

# **The Economic, Social and Environmental Benefits of Heritage Conservation:**

## **An Annotated Bibliography**

**Prepared for:**

**Heritage Resources Branch  
Department of Culture, Youth and Recreation  
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**GREAT EXCURSIONS**

## **Introduction**

The Heritage Resources Branch of Saskatchewan Culture, Youth and Recreation administers programs that provide for the protection, conservation and promotion of heritage property in Saskatchewan. An important part of this work includes raising public awareness of the ways in which heritage conservation contributes to the economic social and environmental sustainability of Saskatchewan communities.

In the spring of 2006 “The Social, Economic and Environmental Benefits of Heritage Conservation: An Annotated Bibliography” was prepared by Great Excursions for the Heritage Resources Branch (HRB). The Bibliography features, in alphabetical order, are brief descriptions of the contents and relevance of several dozen key articles and books on the topic of heritage conservation. While primarily intended for use by the HRB in developing tools to support the promotion of heritage conservation, the Bibliography may be of interest to those individuals, groups and community officials who want to learn more about the benefits of conservation. Where possible, web links to the documents described have been included.

The study was completed as part of Saskatchewan’s commitment to the Historic Places Initiative. The Historic Places Initiative is a Federal/Provincial/Territorial partnership established by the Government of Canada in 2001 to foster appreciation for historic places and increase Canada’s capacity to conserve and maintain these places.

**The views expressed in this report are those of the consultant and do not necessarily represent the views of Saskatchewan Culture, Youth and Recreation nor the Historic Places Initiative Partners**

**Abelson, P. 2002. Valuing the Public Benefits of Heritage Listing of Commercial Buildings. In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century* (Conference Proceedings 2000). Canberra: Australian Heritage Commission.**  
<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

From the abstract: “This paper reviews the main methods of valuing the benefits of heritage listing of commercial buildings to the community and examines the application of these valuation methods to seven listed properties in Sydney. The main public benefits considered are benefits to businesses and residents in the precinct, to tourists and other visitors to the area, and to the general public. The main valuation methods considered are stated preference, hedonic property valuation, travel cost method and economic impact analysis. Of these methods only stated preference techniques have much general application and these techniques require careful implementation and considerable resources. These general observations are confirmed by detailed analysis of the valuation issues that arise for seven heritage listed commercial buildings in Sydney. The paper concludes with a suggested approach for valuing the public benefits of these or other heritage listed commercial buildings in a large city.”

**Abelson, P. and Dominy, C. 2001. *Economics of Heritage Listings*. New South Wales Heritage Office. [http://www.heritage.nsw.gov.au/docs/economics\\_parta.pdf](http://www.heritage.nsw.gov.au/docs/economics_parta.pdf)**

The report finds that there is no simple method for valuing the public benefits of heritage conservation. “The main public benefits of a heritage building are benefits to businesses and residents in the precinct, to tourists and other visitors to the area, and to the general public who may appreciate the cultural ambience but rarely, if ever, visit the area.”

The one section that is of particular interest in the document is comprised of seven case studies of heritage buildings in Sydney and the discussion around them.

**Allison, G., Ball, S., Cheshire, P., Evans, A., Stabler, M. 1996. *The Value of Conservation? A Literature Review of the Economic and Social Value of the Cultural Built Heritage*. London: The Department of National Heritage, English Heritage, and the Royal Institute of Chartered Surveyors.**

This is a good review of literature up until 1995 with ample references and commentary.

**Althaus, H.-J., Kellenberger, D. Doka, G., and Kunniger, T. 2005. *Manufacturing and Disposal of Building Materials and Inventorying Infrastructure in Ecoinvent*. Ecomed Verlagsgesellschaft mbH.**

From the Abstract: “The ecoinvent data provide a harmonized basis for different kinds of building materials. Even though not all data sets could be established on the same level, the results generally are believed to be comparable. Since data are generic, they are, however, not suitable to directly compare specific products. Disposal is relevant for the environmental burdens of uses of building materials. Complete life cycles have been assessed. For this purpose, cumulative energy demand (CED) is not suitable.” Everything from stucco, brick, cement, timber and gypsum fibre board is discussed at various levels.

**Artlab Australia. 2005. *Submission to the public inquiry of the Productivity Commission: Conservation Of Historic Heritage Places*. Adelaide: Artlab Australia.**  
<http://www.pc.gov.au/inquiry/heritage/>

Among other things, this company provides expertise and offers services for the conservation and restoration of murals and decorative paintwork, historic interiors, mosaic and terrazzo floors, stained glass windows, carved timberwork, carpets and curtains, furniture and other fittings such as lights, balustrades and decorative railings. Artlab is also involved in the broader management of heritage buildings and sites. Here is what they say:

“At Artlab we recognise the international importance and potential of a vigorous conservation profession and we are seeking to expand our expertise and our markets. A strong domestic heritage industry will be a strategic diplomatic asset for Australia as well as a potentially important export service. Cultural heritage conservation has been demonstrated on many occasions to be a valuable diplomatic tool. The very processes of conservation inherently convey a deep respect for the cultural heritage being conserved. Australian organisations have used cultural heritage conservation to build close and long lasting relationships in the South Asian region.”

And further:

“Demand for heritage conservation in Asia is growing at an increasing rate and there is very little local supply capacity. There is considerable potential for the export of Australian heritage services and products in the Asian region over the next several decades. Artlab has been active in Singapore, Indonesia, Malaysia and recently Taiwan. But for the Australian industry to remain competitive over this timeframe it must continuously innovate. This must include broadening the approach to heritage conservation to embrace more fully the cultural context of living heritage including intangible cultural heritage.”

**Asabere, P.K., Huffman, F.E. and Mehdian, S. 1994. *The adverse Impacts of Local Historic Designation: The Case of Small Apartment Buildings in Philadelphia*. In *Journal of Real Estate Finance and Economics*, 8: 225-234. Kluwer Academic Publishers.**

Abstract: “This paper examines the sales effects of local historic preservation. Using the hedonic framework our study shows that small apartment buildings experienced a 24% reduction in price compared to nonlocally certified properties. Our variable for federal historic districts, however, produced statistically insignificant results. The results suggest that historic control (as practiced in Philadelphia) is confiscatory. The study illustrates an outcome of public regulation that impinges on private property rights.”

**Australia ICOMOS. 2005. *Submission to the Productivity Commission*. Canberra: Australia ICOMOS (International Council on Monuments and Sites).**

This submission brings to light some of the more difficult to gauge aspects of the value of cultural heritage:

“We are concerned that an holistic view of heritage, and the integrated ways in which communities perceive and experience it does not allow for the boundaries around ‘historic heritage’ to be drawn as neatly as the Inquiry assumes. This issue is partly acknowledged by the Inquiry's Issues Paper, which solicits input regarding the need for historic heritage to be considered in an integrated way with natural and Indigenous heritage, and we encourage the Inquiry to keep this artificial delineation of 'historic' heritage firmly in its view. We are concerned that the Inquiry should acknowledge that the whole of our continent is a richly layered cultural landscape, inextricably linked with the qualities and history of the natural environment and a human history of great antiquity. Further, from the earliest moments of arrival by Europeans in Australia, Australia’s ‘historic’ heritage is a shared heritage and cannot exclude the associations and experiences of Indigenous peoples. The full range of heritage values associated with a place or landscape must always be recognised and appropriately managed.”

The authors state: “Our cultural heritage is varied. It comprises a complex network of buildings, archaeological sites, collections, landscapes, activities and practices, works and precincts. Cultural heritage is a living part of our modern environment and way of life, not just a static object for preservation. The importance of conserving the relationships between heritage places is increasingly being recognised with networks making up the historic landscape being a focus of conservation, not just individual isolated sites. It is important in any discussion of whether we should continue to conserve our cultural heritage and how, to first understand why heritage and heritage places are important and how we benefit from their conservation. Today heritage is recognised as something that permeates daily life, bringing a sense of meaning and identity to an increasingly dislocated world. Heritage is, by its very definition, what people value.”

This is truly a thought provoking paper: “Historic cultural heritage is typically characterised in both statute and practice as value for future generations as well as for the present community. However, its concurrent role as potentially developable real estate does not necessarily accommodate this inter-generational perspective. Property owners, whether private or corporate, are ultimately investors who can take a myopic view and, in many cases, do not consider, let alone seek to retain, what may be of value to future generations, in an unregulated context.”

**Australian Council of National Trusts. 2005. *Submission to the Productivity Commission Inquiry into the Conservation of Australia’s Historic Heritage Places*. Canberra: Australian Council of National Trusts.**

<http://www.pc.gov.au/inquiry/heritage/subs/sub046.pdf>

From the submission summary: “Historic heritage conservation is a fundamentally important element of Australia’s social capital, and this Inquiry provides the Commission with an opportunity to value that capital, and to identify government programs that expand (and do not erode) that value.”

This is basically an advocacy piece: “The historic heritage market is characterised by significant externalities, and the market is unable to operate at its economically efficient level without public funding to address areas of market failure and to provide greater clarity to owners of historic heritage places about their rights and responsibilities.”

**Australian Government (Productivity Commission). 2005. *Conservation of Australia's Historic Heritage Places: Productivity Commission Draft Report*. Canberra: Australian Government.**

<http://www.pc.gov.au/inquiry/heritage/draftreport/index.html.051216>

This draft report was recently released for consultations and has triggered mixed reviews in some circles because of the chiefly economic parameters with which it looked at the benefits of heritage.

Here is how the Productivity Commission describes its mandate: “The Productivity Commission, an independent agency, is the Australian Government’s principal review and advisory body on microeconomic policy and regulation. It conducts public inquiries and research into a broad range of economic and social issues affecting the welfare of Australians.”

The Commission is to examine: “the main pressures on the conservation of historic heritage places; the economic, social and environmental benefits and costs of the conservation of historic heritage places in Australia; the current relative roles and contributions to the conservation of historic heritage places of the Commonwealth and the state and territory governments, heritage owners (private, corporate and government), community groups and any other relevant stakeholders; 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; emerging technological, economic, demographic, environmental and social trends that offer potential new approaches to the conservation of historic heritage places, and; possible policy and programme approaches for managing the conservation of Australia’s historic heritage places and competing objectives and interests.”

The Government will consider the Commission’s recommendations, and its response will be announced as soon as possible after the receipt of the Commission’s report, which should be submitted in 2006.

**Australian Heritage Commission. 2001. *Australian Historic Themes: A framework for use in heritage assessment and management*. Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/generalpubs/framework/pubs/themes.pdf>

This innovative resource comes with a foldout separate document made up of the themes and sub-themes themselves. Both are available as a pdf files. The Thematic Framework comprises nine Theme Groups which encompass and are elaborated by a network of more specific themes: tracing the evolution of the Australian environment; peopling Australia; developing local, regional and national economies; building settlements, towns and cities; working; educating; governing; developing Australia's cultural life; marking the phases of life.

“The consistent organizing principle for the Thematic Framework is activity. By emphasizing the human activities that produced the places we value, and the human response to Australia's natural environment, places are related to the processes and stories associated with them, rather than to the type or function of place. The themes do not

invalidate classifications such as type and function. Themes are simply another way of investigating and interpreting the history of a place.”

I recommend this piece to anyone who is looking to articulate within structures or wishes to create structures networks.

**Australian Heritage Commission. 2001. *Successful Tourism at Heritage Places: a Guide for Tourism Operators, Heritage Managers and Communities*. Canberra: Australian Heritage Commission. <http://www.ahc.gov.au/publications/tourism/index.html>**

We are told that this document was reviewed in 2005. But I haven't found the updated version. It is self-descriptive. This is a good primer on heritage tourism with an Australian perspective. Successful tourism at heritage places depends on understanding the different perspectives of tourism operators, heritage managers and communities and then establishing common ground, building relationships and then forming partnerships. The guide shows how to achieve this. There is a mention of indigenous tourism development; 10 case studies; a glossary of heritage tourism and references. It is a fine resource, especially from the point of view of heritage tourism products.

**Australian Wind Energy Association and Australian Council of National Trusts. 2005. *Wind Farms and Landscape Values: Stage One Final Report - Identifying Issues*. Melbourne: Australian Wind Energy Association and Australian Council of National Trusts. <http://www.auswea.com.au/auswea/downloads/Landscape%20Values%20Stage%201%20Report.pdf>**

This is a very interesting document because it actually looks at the value of landscapes. This particular document completes the first stage of a this three-stage project that aims “to ensure that valued Australian landscapes are protected while enabling wind farming development to occur within an agreed national framework, and to find creative solutions to landscape assessment issues and sustainable energy development, in the context of society's evolving understanding of landscape values and concern about long-term climate protection.” The authors see this report as the essential first step towards achieving our goal of determining agreed approaches to the assessment of landscape values and the potential landscape impacts of wind developments.

“The aim of Stage One is to identify, analyse and develop priorities for key issues and then develop a Stage Two Business Plan to guide that phase of the Project. Stage Two will involve developing an agreed methodology for assessing the landscape values of wind farm proposals. Stage Three will involve road-testing the methodology.”

**Balmain Precinct Committee. 2005. *Submission from Balmain Precinct Committee to the Inquiry into the Policy Framework and Incentives for the Conservation of Australia's Historic Built Heritage Places*. Balmain Precinct Committee. <http://www.pc.gov.au/inquiry/heritage/finalreport/heritage1.pdf>**

This submission by a local Australian Committee makes its point succinctly:

“Balmain provides a rich display of Australia's early development. This includes workers' cottages dating back to the early 1840's, marine villas, townhouses, shops,



hotels and other business establishments. The layout of our streets reflects the early tracks and delivery routes. All of this still has direct impact on our daily lives today. In some respects, our access and movement across the peninsula has not changed greatly in over 120 years. Very few areas in Australia reflect 205 years of European settlement as does Balmain. There is evidence to suggest that Balmain might be the oldest planned residential area in Australia.”

**Barber, S. 2003. Municipal Tax Incentives in Victoria, British Columbia—A Case Study. In *Plan Canada (Vol. 43, Number 2).***

From the Summary: “ Tax incentive programs to stimulate the rehabilitation of historic buildings have been used for years. Similar programs in Canada are beginning to demonstrate the same benefits in revitalizing communities, preserving heritage buildings and combating urban sprawl.

In 1998, the City of Victoria became the first municipality in British Columbia to use a new heritage planning tool: property tax incentives introduced by the provincial government in 1994. The City introduced a program that provides property tax exemptions for up to 10 years to developers who convert vacant or underused upper storeys of downtown heritage buildings to a residential use. Thus the City has created 98 new residential units downtown and stimulated \$32 million of private investment in the substantial rehabilitation of 10 heritage buildings.”

**Bennett, J. 2000. Natural Heritage Valuation Methods: Applications to Cultural Heritage. In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century (Conference Proceedings 2000)*. Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

This presentation by an economist is relevant because the situation facing decision makers with responsibilities in the natural heritage arena is similar to that facing those who determine policies for the management of cultural heritage. In both cases, information for decision-making is derived from a complex mixture of market and non-market sources. The paper explores the potential for cultural heritage applications of Choice Modelling, a non-market valuation technique that has been developed in the context of environmental protection. “A feature of Choice Modelling is its ability to yield a breakdown of the value a heritage protection proposal provides into its component parts—such as the so-called “ use” and “ non-use” values. Furthermore, Choice Modelling applications enable market data to be more accurately extrapolated to cover circumstances for which no data are currently available—such as is the case where a protection proposal will generate entirely new market conditions. It is concluded that these and other features of the technique provide it with some significant advantages over competing valuation techniques such as the Contingent Valuation Method.”

The author concludes that much of the developmental work that has been done on techniques to further the economic evaluation of proposals to protect natural heritage assets would appear to be readily adaptable to the case of cultural heritage assessment.



**Boyle, J.F., Ginsberg, S. and Oldman, S.G., revised by Rypkema, D.D. 2002. *A Guide to Tax-Advantaged Rehabilitation*. Washington: National Trust for Historic Preservation.**

Originally published in 1986 and updated by Rypkema in 2002, this 16-page guide was reissued to “remind preservationists and investors that, while diminished from earlier years, the federal historic rehabilitation tax credit remains a valuable tool for saving historic buildings and revitalizing towns and cities throughout America.”

**Brandes Gratz, R. 1999. *Cities Rebuilt, Cities Reborn*. In *The Journal of the National Trust for Historic Preservation*. Vol. 13, Number 2. Washington: National Trust for Historic Preservation.**

The Journal’s entire issue is made up of speeches from the 52<sup>nd</sup> National Preservation Conference of the National Trust for Historic Preservation. This particular speech by an award-winning journalist and urban critic, lecturer and author is impassioned and compelling for the case it makes for the preservation of historic districts and their inherent ability to draw citizens. She notes: “Thirty years ago Pasadena cleared a historic site in the center of town and built an enclosed mall to renew the city. The mall failed and is now almost vacant. Plans are under way to open the streets again and remove the roof ... So many city leaders lack confidence in the inherent value of their existing retail downtown districts that they seek big financing and big investment to reinvent, rebuild and replace them. This kills a genuine downtown. The replacement never matches the quality lost.” Brandes Gratz believes that rebirth is happening, and that it is happening in small modest steps. “Just as deterioration occurred in small bites, rebirth occurs in small bites. It is happening in traditional neighbourhoods and old districts where the urban fabric has not been eviscerated by parking, enclosed malls, stadiums, convention centres and other replacement mega projects. It is happening where people are moving in, opening new businesses, making modest investments, repopulating once-vibrant areas, generating 24-hour activity and street life.”

**British Government. 2004. *Government Response to ODPM Housing, Planning, Local Government and the Regions Committee Report on the Role of Historic Buildings in Urban Regeneration*. London: British Parliament.**  
<http://www.communities.gov.uk/index.asp?id=1143396>

This document is comprised of 25 key recommendations around the role of historic buildings in urban regeneration. Here is recommendation number 1:

“The historic environment has an important part to play in regeneration schemes helping to create vibrant interesting areas, boosting local economies and restoring local confidence. When historic buildings including churches and theatres are no longer needed for their original use, they are capable of conversion for a wide range of other purposes.”

Each recommendation is followed by a comment or examples of how the recommendation is or should be implemented.

**Butler, R. 2000. *The Loss of Regional Heritage and the Development of Regional Heritage Tourism in Western Countries: a Reoccurring Paradox?* In *Heritage Economics*:**

***Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century (Conference Proceedings 2000). Canberra: Australian Heritage Commission.***

<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

From the abstract: “It is paradoxical that during a period in which the rural heritage and landscape of many western countries is changing radically and even disappearing, tourism based on perceptions of that heritage has grown tremendously. The paper briefly examines these changes in the rural landscape and the replacement of many traditional activities and lifestyles with activities associated with leisure and tourism. While many of these activities were thought to be compatible with the traditional rural milieu and what was perceived to be the rural idyll, in reality tourism and leisure have themselves caused significant change in rural areas. The most recent forms of tourism and leisure activities practiced in many rural areas in western countries have little in common with anything rural beyond the location. The paper explores some of the issues and difficulties posed by this pattern of development, and reflects on the likely implications for the future.”

Butler concludes: “It is essential that residents in rural areas, which are exposed to tourism, be made aware that tourism is more complex and problematic than is generally thought. There are crucial differences between expectations and realities of tourism in rural areas. Under the traditional expectations little planning for tourism is done, assumptions are made as to its role and effects, and positive outcomes are expected. In reality tourism is a major economic force, the second largest industry in the world and one extremely difficult to plan and control. It has a wide variety of impacts seldom appreciated by decision-makers, and is capable and often guilty of changing, and sometimes destroying the environment, physical and human, which has been its rationale (Butler, 1990; Mathieson and Wall, 1982). If expectations are not tempered with reality, frustration and disappointment can, and frequently do result. It is essential that if tourism is to be introduced to, or allowed to permeate an area, that it be planned for and integrated into the normal pattern of activity.”

**Canadian Tourism Commission. 2003. *Canadian Heritage Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)*. Ottawa: Canadian Tourism Commission.**

[http://www.canadatourism.com/ctx/files/publication/data/en\\_ca/research/ market\\_research/canada\\_a\\_marketing/canada\\_heritage\\_tourism\\_enthusiasts\\_tams\\_executive\\_summary\\_2002/canada\\_heritage\\_TAMS\\_exec.pdf](http://www.canadatourism.com/ctx/files/publication/data/en_ca/research/ market_research/canada_a_marketing/canada_heritage_tourism_enthusiasts_tams_executive_summary_2002/canada_heritage_TAMS_exec.pdf)

This report focuses Canadian heritage tourism enthusiasts who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities when they travel. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years and have included at least four of some of these activities or visits listed here: historical replicas of cities/towns, historic sites, general history museums and local festivals or fairs. This is just a sample.

Of the 23.3 million Canadian adults in 2000, about 2.6 million are heritage tourism enthusiasts (11%) according to the report. Of these, over 8-in-10 claim to have taken a leisure trip within Canada during the past two years or so. Thus, the domestic market for Canada’s heritage products is approximately 2.2 million adults. Canadians from all parts

of the country are represented in the Heritage Tourism Enthusiast segment. This document is loaded with factual information on this growing market segment: like:

“Heritage Tourism Enthusiasts are also somewhat more affluent than is the “typical” domestic traveler in Canada, with an average household income of \$60,000 compared to \$54,900 for the typical leisure visitor in Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-quarter of Heritage Tourism Enthusiasts have at least one university degree (28%) and a further 42 per cent have had some post-secondary education.”

**Canadian Tourism Commission. 2004. *Defining Tomorrow's Tourism Product: Packaging Experiences*. Ottawa: Canadian Tourism Commission.**

<http://www.tirc.gov.yk.ca/pdf/Tomorrow'sTourismProductPackagingTAMS.pdf>

From the Executive Summary: “The purpose of this study was to gather group travel information that would assist companies, on a business-to-business level, to better understand the types of visitor experiences that are in demand and gain insights that will assist in ‘*packaging experiences*.’ This study also investigated how organizations create memorable traveler experiences and determined what travelers were willing to pay a premium for value-added benefits. In Feb 2004, focus groups were used to gather insights from travel planners, tour operators, travel suppliers, and destination marketing organizations, representing nine countries. Each organization packages, sells or promotes group travel to affinity groups and educational travelers – audiences that are predisposed to purchasing experiential and learning travel programs.

“The types of visitor experiences in demand included: reaching into the community in ways that enable travelers to meet local people and participate in day-to-day community experiences. The three most popular vehicles were via kitchen parties, home visits, and farm visits; experiential, hands-on, or interactive activities and ‘no-cost, low-cost’ activities that creative companies have included in their tours through innovative use of their core assets; special access and behind-the-scenes tours that go beyond the traditional tourism offer, are unique and in some cases, not available to mass market travelers; learning and discovery that is participatory, involves two-way communication and interaction with locals, and fosters personal growth. These opportunities were not perceived to be value added, rather it was a core expectation of travelers; and, travel that promotes shared experiences with family, friends and fellow travelers.”

A good primer on how one might build on heritage places by creating new value-added products.

**Canadian Tourism Commission. 2003. *U.S. Heritage Tourism Enthusiasts: A Special Analysis of the Travel Activities and Motivation Survey (TAMS)*. Ottawa: Canadian Tourism Commission.**

[http://www.canadatourism.com/ctx/files/publication/data/en\\_ca/research/market\\_research/product\\_development/travel\\_activities\\_and\\_motivation\\_survey\\_tams/us\\_heritage/tams%20report%20U.S.%20heritage.pdf](http://www.canadatourism.com/ctx/files/publication/data/en_ca/research/market_research/product_development/travel_activities_and_motivation_survey_tams/us_heritage/tams%20report%20U.S.%20heritage.pdf)

This report focuses United States heritage tourism enthusiasts who have taken leisure trips in Canada and exhibit a particular interest in heritage-oriented activities when they travel. As such, they have taken leisure trips in Canada and, in many cases, to other destinations in the past couple of years and have included at least four of some of these activities or visits listed here: historical replicas of cities/towns, historic sites, general history museums and local festivals or fairs. This is just a sample.

Of the 200.4 million American adults in 2000, about 34.5 million are heritage tourism enthusiasts (17%) according to the report. Of these, almost 1-in-4 claim to have taken a leisure trip within Canada during the past two years or so. Thus, Canada's market for the heritage segment is approximately 8.3 million American adults.

Again, this is a valuable resource in helping us understand demand for heritage tourism products.

**Cegielski, M., Janeczko, B., Mules, T. and Wells, J. 2001. *Economic Value of Tourism to Places of Cultural Heritage Significance: A Case Study of Three Towns with Mining Heritage*. Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/index.html>

This study on three comparable towns has provided some benchmark data on the value of tourism at regional locations possessing heritage attractions. The locations were all part of the history of Australia's mining development of the 1800s, and in each case the legacy of the mining boom has been assets, mostly buildings and other historical constructions of interest to visitors. Visitors to such locations have shown clear preferences for well-maintained attractions with good amenities and good information. The most valuable information to them is in the form of brief summaries of the offerings at each location.

The study has led to subsequent work and research in Australian heritage tourism development.

**Center For Governmental Responsibility, University Of Florida Levin College Of Law, Center For Urban Policy Research , Rutgers University. 2002. *Economic Impacts of Historic Preservation in Florida (Executive Summary)*.**

<http://www.law.ufl.edu/cgr/pdf/Tech-Exec-Summary.PDF>

This great documents lists benefits by sector: Economic Impacts of Florida Historic Rehabilitation, Heritage Tourism, Historical Museums, Parks & Sites, Historical Resources Grants-In-Aid Program and Rehabilitation Tax Incentives, and of Historic

Districts on Property Values. The information is further broken down by sector. Very well presented.

**City of Broken Hill. 2005. *Heritage & Cultural Tourism Initiatives, 1986 - 2005: Information For Productivity Commission Enquiry*. Broken Hill: City of Broken Hill.**

From the Key Findings: “Heritage and cultural tourism have become an integral part of Broken Hill’s future. The fixed life of the mining industry has led the city to focus on sustainable cultural tourism as an important area of growth with heritage as its major selling point. Most importantly there is now a new attitude and pride within the population of Broken Hill and as the city embarks upon the new millennium this sense of confidence is critical for its community spirit. Strong leadership is a key factor and Broken Hill’s strong community spirit and civic pride is a critical component of its future. Broken Hill provides a unique model for managing heritage at the local level and has established an integrated approach to conserving heritage buildings and revitalising public streetscapes. Innovative plans have been implemented by the City with cooperative efforts between local government and the community, resulting in a renewed sense of pride in the community. Heritage and the heritage programs have played a significant role in the economy of Broken Hill. The tourism experience and the sense of place have been enhanced. Tourism numbers have increased over recent years. The last census showed that more people are employed in commercial sector than in mining, indicating that the economy is robust in itself not just relying on tourism. There has been a trend for retirees to move to Broken Hill given its affordability, and there is considerable anecdotal evidence that the appearance of the city has been a determining factor in the choice of location of the retirees in question.”

**Clarion Associates. 2005. *The Economic Benefits of Historic Preservation in Colorado (2005 Update)*: Denver: Colorado Historical Society.**

This well put together updated version of a 2002 report with new research examines statewide economic impacts associated with the rehabilitation of historic buildings and heritage tourism. It focuses on economic issues that are especially important to owners and users of historic properties, such as the availability of affordable housing in older neighbourhoods, and property value trends in locally designated residential historic districts. In essence the authors find historic preservation is not only about protecting and appreciating the past, it is a key strategy for successful community planning and economic development.

For example, since 1981, rehabilitation activities in Colorado have created almost 29,000 jobs and generated a total of over \$2 billion in direct and indirect economic impacts. In a single recent year, heritage tourism in Colorado created \$3.4 billion in direct and indirect economic impacts and another 60,964 jobs throughout the state. Heritage tourism is perceived as a key industry in Colorado. That is a key message.

**Commonwealth Scientific and Industrial Research Organisation (CSIRO). *Embodied Energy*. <http://www.cmit.csiro.au/brochures/tech/embodied/>**

From the website: “The reuse of building materials commonly saves about 95% of embodied energy which would otherwise be wasted. Some materials such as bricks and

tiles suffer damage losses up to 30% in reuse. The savings by recycling of materials for reprocessing varies considerably with savings up to 95% for aluminium but only 20% for glass. Some reprocessing may use more energy, particularly if long transport distances are involved.”

**Conway, B. D. and Arnold, A. L. 2003. *Historic Preservation and Land Use. Michigan Land Use Leadership Council.***

<http://www.michiganlanduse.org/resources/councilresources/Historic-Preservation.pdf>

The environmental angle from which the issue of historic preservation is approached in this paper makes it valuable.

“Historic preservation promotes downtown revitalization, neighborhood stabilization, affordable housing, and cultural tourism while preserving community character. Reusing underutilized resources in traditional neighborhoods and downtowns: returns them to the tax base; enables communities to put funding into the maintenance of existing infrastructure rather than the construction of new infrastructure; reduces greenfield development and helps to preserve open space and farmland, including historic rural landscapes; keeps building materials out of landfills (24 percent of landfill debris is from construction); results in greater neighborhood diversity of people and properties due to the variety, size, and cost of the housing types found in traditional neighborhoods; promotes mixed-use development in downtowns; makes economic sense

Historic preservation tax credits offer incentives to developers to rehabilitate abandoned or obsolete buildings typically found in urban cores. Historic preservation ensures that compatible development occurs in specified designated areas through the use of design review guidelines developed by the U.S. Secretary of the Interior. Recent studies in Michigan and other states have shown that property values in designated local historic districts almost always increase and never decrease. Property owners—and bank lenders—find local historic district designation a protection for their investments. An outcome of stable neighborhoods is that they attract single-family property owners to downtowns. Historic districts are also often noted as the most diverse of community neighborhoods.”

**Cotterill, D., Knight Merz, S. and Nohel, T. 2000. *The Economic Benefits of Heritage Restoration. In Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century (Conference Proceedings 2000).* Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

From the abstract: “With limited state budgets, heritage conservation has to compete for funding alongside other essential community services. In order to secure funding Heritage Victoria and SKM Economics prepared a study to identify and quantify the benefits of heritage conservation. The study was based on evaluation of the \$16 million Government Heritage Restoration Program undertaken by the Victorian Government between 1994 and 1998. The results led to Victorian Government establishing new \$15 million Public Heritage Program to run over three years from 1999 to 2002. While the study considered the broader benefits of heritage restoration, because of the need to



justify funding compared with the provision of other services, it put more emphasis on establishing the quantifiable economic benefits of restoration. This paper is based on the study and identifies benefits of heritage restoration as the catalyst for economic development, extension of economic use and the attraction of increased visitation and patronage.

**Cultural Human Resources Council. 2006. *Human Resources in Canada's Built Heritage Sector: Mapping The Workforce and Setting Strategic Priorities*. Ottawa: Cultural Human Resources Council. [http://www.culturalhrc.ca/research/CHRC\\_BuiltHeritage\\_E.pdf](http://www.culturalhrc.ca/research/CHRC_BuiltHeritage_E.pdf)**

Human resources in the built heritage sector encompass a broad range of occupations. From the formulation of policy, to the design and execution of intervention strategies, along with ongoing maintenance of heritage structures and related cultural and interpretive programming. A key conclusion of this report is that the built heritage sector is distinct from both new construction and ordinary renovation and repair. Employment in the built heritage sector requires fresh attitudes, specialized training and experience, and distinct skills. This applies equally to professional and technical occupations and to skilled tradespersons, the report finds. It also looks at human resources strategies in the U.S.A., U.K., Ireland and Australia. The report examines professions; identifies needs and makes recommendations in regards to: supporting the professional work force; architecture and engineering professions in the built heritage sector; the relationship between the built heritage sector and the construction industry; rectifying data deficiencies; and maintaining the current momentum in the sector.

**Davies, S. 2004. *Regeneration and Renewal in the South West*. Bathpool: South West Museums Libraries & Archives Council. <http://www.mlasouthwest.org.uk/docs/regeneration-renewal.pdf>**

While pertaining more directly to the context of museums and libraries in South West England, the concepts evoked in this great document harbors potential applications in historic preservation initiatives:

“Regeneration has been defined as the transformation of a place (whether residential, commercial or open space) that has displayed the symptoms of physical, social and/or economic decline.

“Iconic cultural buildings can contribute to the economic, as well as cultural and social regeneration of an area, bringing in new money and creating jobs and opportunities for local people. A great building - whether a new one or a refurbished one - can put a place on the map and generate economic growth. It can become a symbol of an ailing community that it is not prepared to simply lie down and die. It is hard to underestimate the importance of outward design in a successful building. The presence of striking architectural landmarks on our landscape adds significantly to our cultural heritage and sense of place. The Government recognises this: for example, it created the Commission for Architecture and the Built Environment (CABE), and the Prime Minister's Award for Better Public Building, which acknowledges a project which has been successful in all its components not only for design.



In a MORI poll commissioned by CABC in 2002, 81% of people said they are interested in how the built environment looks and feels, with over a third saying they are “very interested” and another third wanting more of a say in the design of buildings and spaces. 85% of people agreed with the statement “better quality buildings and public spaces improve the quality of people’s lives” and thought the quality of the built environment made a difference to the way they felt.”

**Deodhar, Vinita. 2004. *Does the Housing Market Value heritage? Some Empirical Evidence*. Sydney: Macquarie University.**

[http://www.econ.mq.edu.au/\\_data/assets/pdf\\_file/15000/3-2004\\_Mar04.pdf](http://www.econ.mq.edu.au/_data/assets/pdf_file/15000/3-2004_Mar04.pdf)

From the abstract: “This paper discusses an empirical study conducted in Sydney’s upper north shore with the primary aim of estimating the market price differential between heritage-listed and regular, unlisted houses using the hedonic price technique. The research also examined the relationship between market price and the *level* of heritage significance of heritage houses. After controlling for main property attributes, heritage-listed houses were found to enjoy a premium over unlisted houses. This premium is a measure of the combined value placed by the market on both, the heritage character of houses *and* their statutory listing status. The level of heritage significance was also found to have a positive influence on price.”

**Department for Culture, Media and Sport (Britain). 2005. *Better Places to Live: Government, Identity and the Value of the Historic and Built Environment*. London: Department for Culture, Media and Sport.**

[http://www.hha.org.uk/downloads/better\\_places\\_live.pdf](http://www.hha.org.uk/downloads/better_places_live.pdf)

This document is a powerful essay written by the British Culture Secretary Tessa Jowell – a key member of Tony Blair’s cabinet who recently had to “separate” from her husband because of some shady real estate transaction, in order to remain in cabinet.

She writes: “This essay is an attempt to highlight some of the values associated with ‘heritage’. I hope it will be a spur to organisations such as English Heritage, the Historic Houses Association and the National Trust who must work together with us if we are to transform the way in which we tackle the historic and built environment; and a reminder to Government of the importance of remembering who we are and where we came from.”

It is a personal work written in the name of her Department, but it uses vivid examples such as the destruction of the World Trade Center during 9/11 to describe the impact of our built environment on our collective consciousness.

**Department for Culture, Media and Sport (Britain). 2005. *Culture at the Heart of Regeneration: Summary of Responses*. London: Department for Culture, Media and Sport. [http://www.culture.gov.uk/NR/rdonlyres/8667CB79-7686-4266-9723-8B93131C9D23/0/cathr\\_summary\\_of\\_responses.pdf](http://www.culture.gov.uk/NR/rdonlyres/8667CB79-7686-4266-9723-8B93131C9D23/0/cathr_summary_of_responses.pdf)**

This departmental initiative follows the launch of the ‘Culture at the Heart of Regeneration’ consultation document on 30 June 2004. The consultation ran until 15 October 2004, 132 responses were received. This summary sets out who responded and what they said, therefore the views do not reflect those of the Department itself.

Here is a sample of the questions:

“How can we make sure that landmark cultural buildings achieve the right balance between maintaining cultural excellence and relevance to their local communities?”

“What role does culture have to play in tackling the complexities of rural regeneration, and what evidence is there of what works best?”

“What incentives could be put in place to align developers’ short-term objectives with the longer-term cultural and social aspirations of the community?”

The summary states that in general the views were positive. A full delivery plan is to follow this document and will analyze the responses in order to inform the Department’s next steps.

**Department for Culture, Media and Sport (Britain). 2002. *People and Places: Social Inclusion Policy for the Built and Historic Environment*. London: Department for Culture, Media and Sport. <http://www.britarch.ac.uk/conserv/pap.html>**

From the executive summary: “This document sets out why the built and historic environment is important when considering issues of social inclusion. It shows how organisations can play an important role in combating social exclusion. The main policy objective is to make social inclusion a priority for all organisations engaged in planning, producing and promoting the contemporary and historic environment.”

The document notes that organisations working with the historic environment should consider the following issues: Access (making historic buildings accessible to everyone); outreach and education (how the historic environment can contribute to life-long learning); bringing about social change (how the activities of heritage organisations can contribute to overcoming social exclusion and achieving broad social change); and, the historic environment and the community (new ways of using historic buildings to make them relevant to all sections of the community). It looks at consultation and how engagement with the built environment can contribute to active citizenship.

**Department for Culture, Media and Sport (Britain). 2001. Including and Involving People. In *The Historic Environment: A Force for Our Future*. London: Department for Culture, Media and Sport. [http://www.culture.gov.uk/NR/rdonlyres/7C24CABE-41F7-44FA-97D9-3CA9786FC0E6/0/historic\\_environment\\_review\\_part2.pdf](http://www.culture.gov.uk/NR/rdonlyres/7C24CABE-41F7-44FA-97D9-3CA9786FC0E6/0/historic_environment_review_part2.pdf)**

This chapter is part of the publication of a Statement that concludes the most wide-ranging review of policy in this area for several decades in England. The entire document acknowledges that historic buildings, landscapes and other physical survivals from our past all around us are a rich backdrop. “But the historic environment is more than just a matter of material remains. It is central to how we see ourselves and to our identity as individuals, communities and as a nation. It is a physical record of what our country is, how it came to be, its successes and failures. It is a collective memory, containing an infinity of stories, some ancient, some recent: stories written in stone, brick, wood, glass, steel; stories inscribed in the field patterns, hedgerows, designed landscapes and other features of the countryside.

“Building materials and styles can define and bind regions, localities and communities just as potently as ethnic background, dialect or sporting loyalties. Historic landscapes or iconic buildings can become a focus of community identity and pride and proclaim that identity and pride to the wider world.

“Internationally, the imprint of history on our environment is a powerful aspect of our image as a nation. And the value of this rich legacy as a magnet for tourists is massive in economic terms.”

This particular chapter addresses how to make the historic environment accessible to everyone and ensure that it is seen as something with which the whole of society can identify and engage (in the English context).

**Department for Culture, Media and Sport (Britain). 2001. Optimising Economic Potential. In *The Historic Environment: A Force for Our Future*. London: Department for Culture, Media and Sport. [http://www.culture.gov.uk/NR/rdonlyres/6F0F4CD6-DBC9-41E7-8E2C-DC6485149BC3/0/historic\\_environment\\_review\\_part3.pdf](http://www.culture.gov.uk/NR/rdonlyres/6F0F4CD6-DBC9-41E7-8E2C-DC6485149BC3/0/historic_environment_review_part3.pdf)**

This chapter focuses on ensuring that the historic environment’s importance as an economic asset is skillfully harnessed. Of special interest is a statement on the historic environment and regeneration:

“The contribution of the historic environment to regeneration has been powerfully demonstrated in two key English Heritage studies: Conservation led Regeneration and The Heritage Dividend. English Heritage’s research has indicated that every £ 10,000 of its investment attracts £ 48,000 of matching funding from private and public sources and delivers 177 square metres of improved commercial floorspace, two new or safeguarded jobs and an improved home.”

**Department for Culture, Media and Sport (Britain). 2001. Protecting and Sustaining. In *The Historic Environment: A Force for Our Future*. London: Department for**

**Culture, Media and Sport.** [http://www.culture.gov.uk/NR/rdonlyres/7C24CABE-41F7-44FA-97D9-3CA9786FC0E6/0/historic\\_environment\\_review\\_part2.pdf](http://www.culture.gov.uk/NR/rdonlyres/7C24CABE-41F7-44FA-97D9-3CA9786FC0E6/0/historic_environment_review_part2.pdf)

This chapter addresses how to protect and sustain the historic environment for the benefit of our own and future generations (in the English context).

**Department for Culture, Media and Sport (Britain). 2001. Realising Educational Potential. In *The Historic Environment: A Force for Our Future*. London: Department for Culture, Media and Sport.** <http://www.culture.gov.uk/NR/rdonlyres/EB6ED76A-E1C>

This chapter of the British Government's historic Environment policy aims to realize the full potential of the historic environment as a learning resource.

“Whether at school, in further and higher education or in later life, the fabric of the past constitutes a vast reservoir of knowledge and learning opportunities. This is as true of the oldest archaeological remains as it is of buildings of the last fifty years. The history of buildings and places is also the history of the age in which they originated and of the eras in which they flourished. They can tell us about the individuals and the institutions that created them and occupied them and about the societies and the local communities they served. Nor is the educational significance of the historic environment confined to the teaching of history. It is also relevant to subject areas as diverse as economics, geography, aesthetics, science, technology and design. Buildings and places can also play a role in developing a sense of active citizenship; by learning about their own environment and how they can participate in its evolution, people feel a greater sense of belonging and engagement.

“On another level, preserving the fabric of the past requires knowledge and expertise. Half the annual turnover of the construction industry relates to repairs and maintenance. Training in traditional craft skills is essential to ensure that existing buildings are satisfactorily maintained. This is a mainstream economic activity and we need to address the current severe lack of skills by developing an integrated approach to conservation training to ensure that the necessary skills are fostered and passed on from generation to generation.”

**Department for Culture, Media and Sport (Britain). 1999. The Disposal of Historic Buildings: Guidance for Government Departments and Non-departmental Public Bodies.** London: Department for Culture, Media and Sport. [http://www.culture.gov.uk/NR/rdonlyres/26A9CDAF-FF3E-436A-9FD5-3659EDE188F2/0/Disposal\\_Historic\\_report.pdf](http://www.culture.gov.uk/NR/rdonlyres/26A9CDAF-FF3E-436A-9FD5-3659EDE188F2/0/Disposal_Historic_report.pdf)

This policy guidance was first issued in February 1995 by the then Department of National Heritage. It was updated in 1999. It makes 10 key points regarding decisions to dispose of historic buildings. Here is the first one:

“before deciding to vacate a historic building, the feasibility of adaptation and alternative uses should be considered; most older buildings, with sensitive adaptation, can give long-term cost-effective service. In making financial assessments of alternative options, full

account should be taken of the cost of responsible disposal, including any potential costs and risks incurred in maintaining and protecting the building if it becomes vacant.”

Common sense laid to paper.

**Department of the Environment and Heritage (Australian Government). 2004. *Adaptive Reuse: Preserving our Past, Building our Future*. Canberra: Department of the Environment and Heritage.**

<http://www.deh.gov.au/heritage/publications/adaptive/index.html>

The year 2004 was officially designated by Australia as the Year of the Built Environment. To create a positive influence in the spirit of sustainable development, the government published this excellent brochure exploring some of the environmental, social and economic benefits of the adaptive reuse of historic buildings.

The publication explicitly describes demolition as a wasteful process. From an environmental benefit point of view, it makes the argument that new buildings have much higher embodied energy costs than buildings that are adaptively reused. It states that in 2001, new building accounted for about 40 percent of annual energy and raw materials consumption, 25 percent of wood harvest, 16 percent of fresh water supplies, 44 percent of landfill, 45 percent of carbon dioxide production and up to half of the total greenhouse emissions from industrialized countries.

At the social level, keeping and reusing historic buildings has long-term benefits for the communities that value them, including the ability for the local population to keep appreciating them. There is also a mention about how the adaptation of heritage buildings presents a genuine challenge to architects and designers to find innovative solutions. The document then presents 10 case studies of successful examples of adaptive reuses—it makes its point effectively.

**Department of the Environment and Heritage (Australian Government). 2005. *Department of the Environment and Heritage Submission to the Productivity Commission Inquiry into the Policy Framework and Incentives for the Conservation of Australia’s Historic Built Heritage Places*. Canberra: Department of the Environment and Heritage.**

Worth mentioning: “The optimal conservation of historic heritage is not simply a matter of benefit. That the total benefits of historic heritage may be large is not argument enough for its conservation. It should be recognized that conservation of historic heritage comes at a cost and that it is the net benefit from conservation that is relevant to decision-making. There are both direct costs and opportunity costs associated with heritage conservation that need to be considered when making decisions about the preservation of historic heritage. Where a historic heritage site requires restoration to restore the heritage values or alteration for adaptive re-use to retain the heritage values of a site, this will come at a cost. If it is intended that a site retain its historic heritage value then it needs to be maintained to avoid deterioration over time. Maintenance will be an on going cost for the life of the historic heritage asset. It should be noted that the costs of heritage conservation only include the costs of maintaining or restoring the heritage aspects in particular over and above the costs associated with general maintenance. As discussed earlier though it is often difficult to distinguish the heritage values of a place from other

associated values and so may be difficult to distinguish the direct costs associated with the heritage conservation from other property management costs.

When balancing costs and benefits of additional historic heritage conservation it is not only the direct costs of the conservation that should be considered but also the opportunity costs. A decision to conserve a historic heritage building for instance would forego the opportunity to use the site for other purposes. The socially optimal level of historic heritage conservation is said to occur when the social marginal costs are equal to the social marginal benefits. Society would only move to increase conservation where the additional benefits from that conservation are greater than the additional costs associated with the conservation.”

**Department of the Environment and Heritage (Australian Government). 2004. *Second Submission to the Productivity Commission Inquiry into the Policy Framework and Incentives for the Conservation of Australia’s Historic Built Heritage Places*. Canberra: Department of the Environment and Heritage.**

From the introduction: “There is evidence of market failure in the ‘provision’ of historic heritage, as public good benefits are not always reflected in the market values. As a result, the market, left to its own devices, is likely to provide a less than ‘ideal’ level of historic heritage conservation. Acceptance of this view has led governments to intervene, chiefly through regulatory responses and, to a lesser extent, through various incentives measures.”

In its Key Messages, the submission states: “The Department considers that government intervention in historic heritage conservation should be guided by the concept of a sustainable heritage system. It is currently exploring ways in which the national heritage system could be more sustainable, including through increased cooperation with other levels of government and consultation with private and community groups.”

**Dukas, Vilia. 2005. *Desk-top Study of Web-based Heritage Related Educational Resources*. Victoria: Australian Council of National Trusts and Deakin University.**  
<http://www.deakin.edu.au/arts/chcap/HeritageEdStudy.pdf>

This desktop study was commissioned to assist the Australian Council of National Trusts to develop an educational website, and provide a resource for heritage education offered through English-language, heritage related organisations, both in Australia and internationally in order to: scope out the availability of heritage focussed educational materials and programs; provide a strategic overview of existing materials to assist future program development; and to provide a resource for the ACNT educational website currently in development. It is up to date and clearly presented.



**Economics for the Environment Consultancy. 2005. *Valuation of the Historic Environment: The Scope for Using Results of Valuation Studies in the Appraisal and Assessment of Heritage-related Projects and Programmes*. London: English Heritage.**  
[http://www.english-heritage.org.uk/upload/pdf/ValofHistoricEnv\\_eftecExecSumED2.pdf](http://www.english-heritage.org.uk/upload/pdf/ValofHistoricEnv_eftecExecSumED2.pdf)

This study was commissioned because the partners – English Heritage, the Heritage Lottery Fund, the Department for Culture, Media and Sport and the Department for Transport -perceived a joint need for an in-depth review of existing valuation studies concerned with the historic environment. It contributes to heritage management decisions around: strategic needs in the heritage sector; determination of research priorities; expenditure on repair and restoration; expenditure on the environment in which heritage is presented and enjoyed; preservation priorities concerning ‘recent’ heritage; and gathering information on people’s preferences concerning heritage assets. It looks at heritage as an economic good that generates flow of human well-being that may or may not have market prices.

The study uses economic paradigms and formulas to assess the total economic value of the heritage good. Economic value has use and non-use components, the sum of which is total economic value. Where an asset is threatened with disappearance, its entire total economic value constitutes the benefit of preventing that disappearance. It looks at the concept of value transfer, which is a process whereby information regarding economic value in one context is applied to a new context for which an economic value is required. There is a literature review, some case studies, recommendations and conclusions and an annotated bibliography of heritage valuation studies.

**Florida Department of State. (pamphlet) *Return on Investment: Florida’s Cultural, Historical and Library Programs – An Economic Impact Summary by the Florida Department of State*. Tallahassee Florida Department of State.**  
<http://www.flheritage.com/files/roi.pdf>

This is a 2-page pamphlet with useful information on the Florida context:

“• The total impact of historic preservation in Florida is \$4.2 billion a year. This encompasses the impact of job creation, income generated, increased gross state product, and increased state and local taxes.

• 123,242 jobs were created in 2000 from historic preservation activities in the sectors of manufacturing, retail trade, services and construction. State officials estimate that between 60 percent and 70 percent of the budget for a historic rehabilitation project is expended on labor, which benefits local workers. Furthermore, historic preservation added \$2.7 billion to statewide income in 2000.

• Approximately 42.9 million tourists visited the state's more than 135,000 historic sites, historic museums, state parks and archeological sites. These tourists spent a total of \$3.7 billion. Additionally, more than one-half of Florida's museums are historical, welcoming more than 9.7 million visitors in 2002, according to the Florida Association of Museums.



- Historic preservation activities help to maintain property values in historic districts. In a survey of 18 historic and 25 non-historic residential districts across Florida, historic preservation was never found to depress property values. In fact, historic preservation contributed to greater appreciation of property value in at least 15 cases. An example of this can be found in Jacksonville's Springfield Historic District where property values have doubled due to rehabilitation efforts.

- Public funds invested in historic preservation grants are matched many times over with private funds in local rehabilitation projects. Since 1983, state historic preservation grants have been awarded to projects in every Florida county, representing 2,751 projects and a state investment of \$212.1 million. The Secretary of State's office estimates funding is more than doubled by leveraged public and private funds in these local communities.”

**Gale, D.E. 1991. *The Impacts of Historic District Designation in Washington, D.C.* Washington: National Trust for Historic Preservation.**

From the introduction: “In Washington, as elsewhere, proponents have argued that designation is necessary to protect historically significant neighborhoods from encroachment by new office and commercial development. Opponents, on the other hand, have charged that such controls depress property values and may limit business expansion. In more recent years however, a new objection, primarily from renters, it seems, has emerged. The new objection argues that property values will rise as a result of designation, leading to higher property taxes and rents. As a consequence, low- and moderate-income households and small businesses will be forced out of the neighborhood (i.e. the displacement issue).” This is explored.

**Goddard-Bowman, R. 2003. *Something Old is Something New: The Role of Heritage Preservation in Economic Development.* In *Papers in Canadian Economic Development*. Vol. 9. [http://www.historicplaces.ca/downloads/smart\\_growth\\_en.pdf](http://www.historicplaces.ca/downloads/smart_growth_en.pdf)**

This is a good introductory piece on how conservation of the built heritage can contribute to economic development directly and indirectly.

**Government Finance Research. 1991. *The Economic Benefits of Preserving Community Character: A Case Study from Galveston, Texas.* Washington: National Trust for Historic Preservation.**

A decent case study: “The state earned approximately \$1.1 million in sales tax revenues from the historically generated tourism, while the city of Galveston earned approximately \$0.5 million.”

**Hansen, R. 2000. *Urban Heritage Revitalisation—Adaptive Reuse in the Wider Policy Context.* In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century* (Conference Proceedings 2000). Canberra: Australian Heritage Commission. <http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>**

From abstract: “The concept of adaptive reuse of heritage places is instrumental in ensuring the future maintenance, care and well being of these places. For many years, the focus has been mainly on how to achieve appropriate adaptive use with minimal impact on original fabric and protection of the overall integrity of the place. However, in the last decade or so several local planning authorities have formulated and implemented planning and development policies and programs which actively promote this concept as an integral part of injecting life and vitality into our urban environments. These policies generate considerable direct and indirect social, cultural and economic benefits for communities, as well as financial rewards for the owners of these heritage places.

“The use of planning policy to encourage adaptive use of heritage places is successfully being undertaken in the City of Melbourne. A selection of heritage places that have been reinvented and revived as a result of this approach will demonstrate the links between policy and practice. The key ingredients of the Melbourne City Council’s approach will be identified for future policymakers seeking to maximize the benefits of adaptive use of places of cultural heritage significance.”

**Hartford, M.A. 1992. *Promoting Heritage Preservation: Private sector Incentives*. Toronto: University of Toronto (Program in Planning).**

Part of a series titled Papers on Planning and Design, this publication provides a good overview of the Canadian historic preservation incentives in the early 1990s. Examples from Winnipeg, Toronto and Edmonton are provided.

**Heritage Canada Foundation. 2000. *Canadians and Their Attitudes on Heritage: Pollara Survey Results*. Ottawa: Heritage Canada Foundation.**

A Pollara survey conducted for the heritage Canada Foundation in August and September of 2000 found that Canadian do care about their built heritage. 9 in 10 Canadians (91%) reported that conservation is very important (50%) or somewhat important (41%) to Canadian culture and identity. A high number of Canadians surveyed (61%) believed that preserving built heritage was important. Worth nothing is the survey finding that dispels the myth that those interested in preserving heritage buildings tend to be members of the elite. Uniformly, more that sixty percent of all workers interviewed, including white collar, grey collar (those in the service industries) and blue-collar workers believed that preserving built heritage was important.

**Heritage Canada Foundation. 2003. *Proceedings, Heritage Canada Foundation Conference: Discovering Heritage Tourism*. Ottawa: Heritage Canada Foundation.** Hard copy is available from [heritagecanada@heritagecanada.org](mailto:heritagecanada@heritagecanada.org).

In more chronological fashion than the Canadian Tourism Commission’s “Packaging the Potential” document, this account of the 2002 Heritage Canada Foundation convention provides additional insight on how the Canadian Tourism Commission and the tourism industry relate to built heritage and increasingly identify with it in the way they respond to consumer demand for increased authenticity in the experiences offered.

Sessions specifically addressed the topic of built heritages places and heritage tourism. The document addresses how surveys of both Canadians and Americans indicated an

increasing desire to visit historic sites. Some of the results of successful tourism at heritage places include: the recognition of the importance of heritage places; the development of mutually beneficial partnerships; the incorporation of heritage issues in business planning; and the creation of high-quality visitor experiences.

The business of heritage tourism is discussed. This is followed by a presentation on heritage tourism in the United States and the guiding principles for successful and sustainable cultural heritage tourism. Lastly, new trends in conserving and presenting heritage sites are discussed, along with some benefits and trade-offs that come with heritage tourism, like the impact of the shopping culture on local communities.

**Heritage Canada Foundation. 2001. *Exploring The Connection Between Built And natural Heritage: Research Report*. Ottawa: Heritage Canada Foundation.**

<http://www.heritagecanada.org/eng/about/pub.html#>

This publication constitutes a very useful overview of the links between the preservation of built heritage, the conservation of natural resources and the goal of sustainability. It points to an emerging awareness of the environmental elements of the building stock and quotes a number sources on the topic. It is estimated that the embodied energy of Australia's built environment, for instance, is equivalent to ten years of its energy usage. It cites how the Toronto Regional Architectural Conservancy (TRAC) recognizes that by preserving buildings, demolition waste and new construction waste are eliminated and embodied energy in the existing building materials is conserved. The report notes how the current tax structure in Canada often encourages waste generation and provides examples of that. This report is well referenced and includes a bibliography.

**Heritage Canada Foundation. 2003. *Human Resource Issues in the Preservation of Heritage Buildings: Research Report*. Ottawa: Heritage Canada Foundation.** Hard copy is

available from [www.heritagecanada@heritagecanada.org](mailto:www.heritagecanada@heritagecanada.org)

During the last three decades, a workforce of built heritage preservation professionals and trades people has emerged in Canada. However the cohort of trades and professional and professional conservation workers is not adequately recognized or understood, according to this study. If we use the conservative estimate that 10% of pre-1941 buildings possess heritage value, then there are approximately 128,000 residential properties in Canada that require ongoing maintenance, repair and preservation work. The report suggests there is an unmet demand for staff with heritage skills in both the trades and the professions. It makes the case for increased education, training and certification opportunities, as well as for better data collection and analysis.

**Heritage Canada Foundation/Canadian Tourism Commission. 2004. *Packaging the Potential: Discovering Heritage Tourism — Practical Ideas for the Tourism Industry*. Ottawa: Heritage Canada Foundation/Canadian Tourism Commission.**

[http://www.canadatourism.com/ctx/files/publication/data/en\\_ca/product\\_development/cultural\\_tourism/ptpe.pdf](http://www.canadatourism.com/ctx/files/publication/data/en_ca/product_development/cultural_tourism/ptpe.pdf)

This is a useful adaptation of the proceedings from the 2002 Heritage Canada Foundation conference in 2002 that was well received by both heritage and tourism sectors. It

highlights authentic tourism experiences as among the fastest-growing, highest-demand products in the tourism industry today and points out that Canada is in good position to develop the potential of this tourism sector. The domestic market for heritage tourism products is approximately 2.6 million and growing; and the size of the American market for Canadian heritage tourism is more than 8.3 million. From success stories in cultural landscapes interpretation to saving lighthouse structures, the document lays out principles and steps to heritage tourism development in historic sites and parks. It touches on some of the issues that arise from tourism development like over-commercialization. It also proposes innovations and solutions with the premise that tourism helps pay for conservation. (See also “Proceedings, Heritage Canada Foundation Conference: Discovering Heritage Tourism, 2003”)

**Heritage Canada Foundation. 2002. *Proceedings, Heritage Canada Foundation Conference: Preservation Pays – The Economics of Heritage Preservation*. Ottawa: Heritage Canada Foundation.** Hard copy is available from [www.heritagecanada@heritagecanada.org](mailto:www.heritagecanada@heritagecanada.org)

Like many conference proceedings, this compilation provides a broad look at a theme through the eyes of experts speaking on specific sub-themes. These range from the importance of understanding the economic dimensions of heritage conservation, while avoiding the danger of reducing heritage to its economic considerations alone; to utilizing commercial market analysis techniques employed by retail shopping area developers to preserve heritage buildings and districts and strategically aligning heritage areas for them to focus on pleasure shopping. Included in the proceedings is a European perspective on the value of conservation and how public and private sector investment in the conservation of historic architecture is also an investment into quality of life, as it is closely tied to the quality of the urban landscape, and how that contributes to economic development. This survey is followed by a view from the United States and how preservation pays in that country. There is a discussion on heritage tourism; an account on the heritage property business by a developer; and a summary of presentations on the history and heritage of Old Town Toronto—some of the dynamics around values (economic and others), pressures and planning issues.

**Heritage Canada Foundation. 2004. *Proceedings, Heritage Canada Foundation Conference: Stewardship of Heritage Buildings – Are We Committed?* Ottawa: Heritage Canada Foundation.** Hard copy is available from [www.heritagecanada@heritagecanada.org](mailto:www.heritagecanada@heritagecanada.org)

Noteworthy at this edition of the conference is the summary of the presentation made by Michael Tippin of Tippin Corporation in Toronto (pages 18-19). He rehabilitates heritage properties for a living. He describes his real estate business as being about collecting architectural landmarks. He also talks about other heritage property investors who are helping preserve landmarks. In his opinion, well-preserved architectural landmarks deliver extraordinary economic and cultural returns on investment. Since 1998, investors in his 13 projects have received a return of 21% on their money per year. “We are interested in profitability preserving architectural landmarks,” he is quoted as saying. He lays three profit principles he goes by: architecture is art, which is about a subjective emotional value, and architecture should be approached the same fashion; he advocates de-commoditizing property—eschewing price and embracing value; thirdly, Tippin

invites people to brand the heritage character of such landmarks. The actual age of the building matters less than the unique characteristics it is endowed with—it is these that should be promoted.

**Heritage Canada Foundation. 2000. *Proceedings, Heritage Canada Foundation Conference: Towards A National Trust*. Ottawa: Heritage Canada Foundation.** Hard copy is available from [www.heritagecanada@heritagecanada.org](mailto:www.heritagecanada@heritagecanada.org)

Participants at the conference explore whether it is time for Canada to have its own National Trust to be the steward of historic places in the country. Through the proceedings, trends affecting heritage conservation are addressed. Among these are the growth in number of heritage sites; the evolving perception of what heritage is important and why that is; and how the resources with cultural value have changed since the post-First World War Days, affected by events and contexts. Examples of how heritage designation has positively influenced community-building also are cited. There is a mention of heritage information itself makes a useful contribution to environment management and plays a critical role in helping Canadians see themselves as individuals linked to the historic patterns of a greater community.

**Heritage Victoria. 2001. *Heritage Listing & Property Valuations in Victoria*. Victoria: Heritage Victoria.**

From the abstract of this Australian publication: “Research studies, both domestic and international, indicate that heritage listing on a macro level, is not a significant factor in determining property value either at the time of listing or following. However, there are individual cases where the effects are more significant, either positive or negative. The initial effect is often dependent on the stage of the property market. When the market is in a strong upcycle the incentive for redevelopment increases the land value relative to the incumbent building value. In such a climate, the effect of heritage listing may have some impact. However, the impact will largely depend upon the capacity to redevelop the specific property without compromising its heritage significance. It is often difficult to estimate the specific effects of heritage listing on the value of a property since heritage controls do not prohibit development, subdivision or demolition but require that approval be obtained. Where there is some capacity to develop the particular place and achieve additional development on the land without seriously compromising the heritage significance of the place, the impact on values may not be as great as where the capacity for further development is more limited.”

Some interesting examples of actual properties are provided.

**Heritage Foundation of Newfoundland and Labrador. 2004. *The Case for Heritage: Six Heritage Projects of the Heritage Foundation of Newfoundland and Labrador*. St. John's: Heritage Foundation of Newfoundland and Labrador.**

Six case studies from different communities are presented with some before and after photographs.

**Humphreys, J. 2004. *Tax Incentives for Historic Rehabilitation in Western New York*. Buffalo: Bank of New York's Buffalo Branch, [www.newyorkfed.org/regional/rehab1b.pdf](http://www.newyorkfed.org/regional/rehab1b.pdf)**

The Federal Reserve Bank of New York's Buffalo Branch published this study because of how tax incentives provide investors, entrepreneurs and community developers with strategic investment opportunities. In this context these have the ability to create private and public benefits by providing a market-based alternative to government ownership and management of historic properties, explains the report. This is a survey of one state's experience, inspired by the recognition that historic preservation brings all kinds of benefits to all kinds of situations.

**Institute of Field Archaeologists and Atkins Heritage. 2004. *Measuring The Social Contribution Of The Historic Environment*. National Trust (England). <http://www.archaeologists.net/modules/icontent/inPages/docs/pubs/soccont.pdf>**

From the Executive Summary: "Setting the historic environment and social policy background, this report details how with input from experts in other sectors (eg economists, anthropologists and social psychologists) one of a number of potential conceptual models was developed for ways in which awareness of the historic environment might promote social capital and thence a range of social benefits. It reports on preliminary field trials in Stoke-on-Trent, proposes a promising shortlist of indicators for further development, and sets out some of the ways in which further work in Stage 2 would help the historic environment sector 'put heritage to work where it is needed most'."

The methodology and everything is there—a very good resource that touches on environmental psychology and other areas with a decent bibliography and a list of further readings.

**Kass, T. 2003. *A Thematic History of the Central West - Comprising the NSW Historical Regions of Lachlan and Central Tablelands*. New South Wales Heritage Office. [http://www.heritage.nsw.gov.au/docs/thematchistory\\_centralwest.pdf](http://www.heritage.nsw.gov.au/docs/thematchistory_centralwest.pdf)**

A great Australian interpretive resource, "this thematic history was prepared as part of the State Heritage Register Project. This project aims to identify for listing on the State Heritage Register places and items which demonstrate the key stories in the historical development of the districts of the Central West."

Arranged in volumes, it looks at: tracing the Evolution of the Australian Environment; the peopling of Australia; aboriginal cultures and interactions with other Cultures; the convict theme; ethnic influences; migration; developing local, regional and national economies; agriculture; commerce; communication; environment - cultural landscape; events; exploration; fishing; forestry; health; industry; mining; pastoralism; science; technology; transport; building settlements, towns and cities; accommodation; land tenure; towns, suburbs and villages; utilities; working; labour; educating; education; governing; defence; government and administration; law and order; welfare; developing Australia's Cultural Life; creative endeavour; domestic life; leisure; religion; social institutions; sport; marking the phases of life; birth and death; and, persons.



**Kleye, F. E., 1980. *Rehabilitation of Historic Buildings: An Annotated Bibliography*. Washington: Department of the Interior.**

This compilation is an update of a 1976 “Reading List” entitled “A Selected Bibliography on Adaptive Use of Historic Buildings.” It was prepared in response to the increasing number of projects at the time, as a result of the passage of the Tax Reform Act on 1976 and the Revenue Act of 1978 which provided tax incentives for rehabilitating historic income producing buildings.

**Leichenko, R. M., Coulson, N. E., and Listokin, D. 2001. *Historic Preservation and Residential Property Values: An Analysis of Texas Cities*. In *Urban Studies*, Vol. 38, No. 11, 1973-1987. Carfax Publishing.**

[http://geography.rutgers.edu/people/faculty/leichenko/leichenko\\_coulson\\_listokin2001.pdf](http://geography.rutgers.edu/people/faculty/leichenko/leichenko_coulson_listokin2001.pdf)

From the abstract: “While historic designation is generally thought to have a positive impact on property values, evidence on this issue is mixed. One limitation of previous research is that it typically focuses on historic neighbourhoods in one city and thus bases its conclusions on a very limited sample. This study expands upon previous work by examining the effects of designation on property values across a larger set of cities.”

Housing prices in the historic districts and those in comparable neighbourhoods of nine Texas cities are estimated using hedonistic regression models. In real estate economics, hedonistic models are used to adjust for the problems associated with researching a good that is as heterogeneous as buildings. Because buildings are so different, it is difficult to estimate the demand for buildings generically. Instead, it is assumed that a house can be decomposed into characteristics such number of bedrooms, size of plot or distance to the city centre. The Wikipedia Encyclopedia explains that a hedonic regression equation treats these attributes (or bundles of attributes) separately, and estimates prices (in the case of an additive model) or elasticity (in the case of a log model) for each of them. This information can be used to construct a price index that can be used to compare the price of housing in different cities, or to do time series analysis. The study concludes that historic designation enhances property values.

**Leithe, J. and Tigue, P. 1999. *Profiting From The Past: The Economic Impact Of Historic Preservation In Georgia*. Atlanta: Georgia Department of Natural Resources.**

[http://hpd.dnr.state.ga.us/assets/documents/profitting\\_from\\_the\\_past.pdf](http://hpd.dnr.state.ga.us/assets/documents/profitting_from_the_past.pdf)

Here are some of the conclusion elements: Investments in the rehabilitation of historic properties create construction jobs at a greater rate than for new construction, because rehabilitation projects are typically 60-70 percent labor as compared to the 50 percent labor that is typical for new construction. Investments in the rehabilitation of historic properties return under-utilized buildings to property tax rolls and increase property values. Investments in the rehabilitation of historic properties provide cost-effective, affordable housing for low- and moderate-income Georgians. Investments in Georgia's downtowns and neighborhoods maximize use of already existing infrastructure and save local tax dollars from being spent on expensive new sewer, water lines and roads. Investments in historic sites and structures create attractions for heritage tourists, the highest average spenders of all tourists. Investments in historic sites and attractions create jobs for local residents. Historic district designation has protected and enhanced property values in many communities throughout Georgia. Historic preservation programs are



proven engines of economic growth, attracting private investment into Georgia's downtowns and neighborhoods at many multiples of public dollars expended.

“From Native American sites, to sites of the Civil War, to the gold rush era, to the day’s of the Civil Rights movement, Georgia possesses immense cultural and historical resources. The evidence is clear, however, that these resources are also economic assets to the state.”

**Lichfield, N., Hendon, W., Nijkamp, P., Ost, C., Realfonzo, A. and Rostirolla, P. 1993.**  
*Conservation Economics—Cost Benefit Analysis: Principles and Practice.* Colombo: ICOMOS (International Council on Monuments and Sites).  
<http://www.international.icomos.org/publications/93econom.htm>

This economic research compilation resulting from an Italian historic preservation debate following earthquakes in 1980 and 1981 was produced by the ICOMOS International Scientific Committee. It explores a wide range of economic, social and environmental benefits. Conservation economics remains the main focus.

**Listokin, D., Lahr, M. L., St. Martin, K., Francisco, N., and McGlyn, M. B. 2001.**  
*Economic Impacts Of Historic Preservation In Missouri.* Jefferson City: State University of New Jersey. <http://www.dnr.mo.gov/shpo/RutgersStudy.pdf>

Here is another comprehensive document. From the Summary of Benefits:

“Annual direct economic effects, calculated conservatively, include \$346 million in historic rehabilitation spending, \$660 million in heritage tourism spending, about \$5 million in nets Main Street Program activity—for a total of slightly over \$1 billion annually. Since its inception in 1998, the Missouri Historic Preservation Tax Credit Program (HPTC) has cumulatively amounted to about \$300 million in rehabilitation investment. The MHPTC, spurred by cumulative state assistance of about \$75 million in credits (about \$25 million yearly), contributes to the \$1 billion of annual Missouri historic preservation activity.”

**Listokin, D., Listokin, B. and Lahr, M. 1998. The Contributions of Historic Preservation to Housing and Economic Development. In *Housing Policy Debate*. Vol. 9, Issue 3. Fannie Mae Foundation.**  
[http://fanniemaefoundation.org/programs/hpd/pdf/hpd\\_0903\\_listokin.pdf](http://fanniemaefoundation.org/programs/hpd/pdf/hpd_0903_listokin.pdf)

In this American article published by a group concerned with access to affordable housing, it is argued that while historic preservation contributes to housing and economic development with the production of 250,000 housing units through the use of the federal historic rehabilitation tax credit and through heritage tourism, it also has a downside. It can lead to displacement of area residents and hinder new development. Preservation requirements may impede affordable housing production. However, the authors argue, preservationists are working to become more flexible. They suggest ways to practice historic preservation while mitigating some of the negative consequences through the implementation, for example, of tax credit changes, more flexible building codes, and a

“tiered” system of designating historic properties at varying levels of significance. The bibliography contains more than 100 entries.

**Mason, R. 2002. *Assessing Values in Conservation Planning: Methodological Issues and Choices*. In de la Torre, M. Ed. *Assessing the Values of Cultural Heritage: Research Report*. Los Angeles: The Getty Conservation Institute.**

[http://www.getty.edu/conservation/publications/pdf\\_publications/assessing.pdf](http://www.getty.edu/conservation/publications/pdf_publications/assessing.pdf)

The entire report to which this paper belongs is rich in valuation theory discussion. Mason’s contribution sets the stage nicely: “This paper explores issues, methodologies, and tools applicable to value assessment, and its goal is to generate guidance for selecting appropriate methodologies (strategies) and tools (tasks) to assess heritage values as part of integrated conservation planning. This research goal stems from the realization that the conservation field, at present, is not very proficient at gauging all the values of heritage.”

**Mason, R. 2005. *Economics and Historic Preservation: A Guide and Review of the Literature*. Washington: The Brookings Institution.**

The author Randall Mason teaches in the Graduate Program in Historic Preservation at the University of Pennsylvania’s School of Design, where he is associate professor of City & Regional Planning.

From the abstract: “Nearly any way the effects are measured, be they direct or indirect, historic preservation tends to yield significant benefits to the economy. However, the methods of determining the value of historic preservation vary widely, and several challenges persist in applying economic methods to the field. This discussion paper, which is followed with an extensive and annotated bibliography, reviews the current findings on the value of historic preservation and the methods used to assess that value, making the case for needed improvement if the economics of preservation is to more objectively and rigorously quantify the effects of historic preservation.”

The author finds there is a relative lack of research on the economics of preservation compared to more market-centered areas of economics; and that not surprisingly, the literature is weighted toward advocacy studies.

“One clear research direction identified in the literature revolves around creating hybrid methodologies able to gauge both economic and cultural benefits and values of preservation in more sophisticated ways.”

The annotated bibliography is priceless. It includes a First Ten Readings Section and a thematic listing of titles. Themes include: Environmental Economics and Works on the Notion of Value, among others.

**McArthur, S. 2000. The economic rationale for adaptive reuse-case study of the North Head Quarantine Station. In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century* (Conference Proceedings 2000). Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

From abstract: “This paper will provide a cultural tourism developer/operator’s perspective on generating economic returns from cultural heritage, and the need to develop economically orientated tools to assess the condition and resources to conserve and present the significance of a heritage site. Specifically, this paper will briefly outline the economic arguments and assessment processes that led the NSW National Parks and Wildlife Service to tender out a 45 year lease for the Quarantine Station in Sydney to Mawland Hotel Management. Mawland’s proposed adaptive reuse of the site has been designed to generate sufficient wealth to better conserve the site and increase public access, interpretation and marketing. The Proposal will also return a profit share to the National Parks and Wildlife Service for the conservation of other cultural heritage sites within Sydney Harbour National Park. The Environmental Impact Assessment of the Proposal required Mawland’s consultants to identify the condition of the site, past spending on conservation, public access and interpretation, and the economic impacts resulting from the Proposal. This exercise should provide some ideas and lessons to enhance the economic management of other heritage sites.”

**McCaan, Joy. A Lot In Store. 2002. *Celebrating Our Shopping Heritage*. Parramatta: New South Wales Heritage Office.**

[http://www.heritage.nsw.gov.au/docs/A\\_Lot\\_In\\_Store\\_pp1-9.pdf](http://www.heritage.nsw.gov.au/docs/A_Lot_In_Store_pp1-9.pdf)

A Lot in Store tells the story of NSW shopping and retailing and investigates why shopping heritage there is vulnerable. It investigates how to identify, conserve and interpret historic shops and collections. It also explores opportunities to keep historic shops in business and to celebrate this living aspect of communities. This study aims to give practical suggestions to people who want to look after a particular aspect of NSW shopping heritage. It has a focus on interior fixtures and movable collections and explains how to record information about the shop and its contents. It is a useful guide in assessing the significance of the shop as a whole and not just as an empty building shell.

**Mcdougall & Vines Conservation and Heritage Consultants. 2005. *Broken Hill – New South Wales Verandah Program: Summary Report*. Broken Hill: Broken Hill Verandah Revival Program.**

[http://www.heritage.nsw.gov.au/docs/brokenhill\\_verandahprogramreport.pdf](http://www.heritage.nsw.gov.au/docs/brokenhill_verandahprogramreport.pdf)

Broken Hill is small Australian city with a mining history that heritage conservation advocates describe as of world significance – despite minimal rainfall and extreme summer temperatures it has survived as a settlement with a strong community spirit and civic pride. From 1886 it burgeoned as a mining centre attracting skilled men and labour from all over the world. By 1907, when it was proclaimed a city, 9,000 men were employed on the mines. With mining as its focus the population of the city peaked at 35,000 in 1915 and again at 33,000 in 1952. However since that time the population has

been steadily declining as the mines have closed, and the population was predicted to fall to 15,000 by the year 2000. There are still 20,000 people in the city with 500 employed on the mines. In nine years the last mine will close and the city will need to turn fully to an industry that has been steadily developing – that of cultural tourism.

This report summarizes the achievements of the Broken Hill verandah program which was commenced in 1998 initially as a four year program, jointly funded by the NSW Heritage Office and the Broken Hill City Council. This program continues into the future as a sustainable program working on a revolving fund basis. The Broken Hill Verandah program has developed over the last four years and has the following objectives: to reconstruct verandahs to heritage buildings based on early photographs and other documentary evidence; to identify other buildings in Broken Hill which would benefit from the construction of a post supported verandah, which would continue the verandahed character of Broken Hill; to assist with the reinstatement of the distinctively Broken Hill commercial character in the main street areas, particularly Argent Street, by the reconstruction of verandahs.

This is a good example of how a heritage enhancement projects is counted on to support a cultural/heritage tourism vocation. There are good cost descriptions with photographs of achievements, but little in the way of measured impacts.

**McVittie, E. and Brand, S. 2004. *Economic Contribution of Museums, Libraries and Archives in the South West*. Bathpool: South West Museums Libraries & Archives Council. <http://www.swmlac.org.uk/docs/economic-impact-libs-archives.pdf>**

This study quantifies the regional economic contribution of museums and galleries in the South West of England. The contributions are expressed in terms of Gross Value Added (GVA) and Full-time equivalent (FTE) employment. It is a good example of the type of economic impact studies than can be conducted around this type of institution. It certainly would be useful if the museum or gallery were located in a heritage property, as a way to measure the multiplied impact of the preservation of historic structures.

**Mercer, Colin. 2004. *Museum Impact Assessment: A practical guide*. South West. Bathpool: Museums Libraries & Archives Council. <http://www.mlasouthwest.org.uk/docs/Impact-Assessment-of-South-Hams-Teignbridge-Museums.pdf>**

From the introduction of this resource from England: “This Guide has been produced to help curators, Museum Development Officers and local authority community officers, assess the impact of – and make a case for – the role and contribution of smaller museums. We hope that this guide will also be useful for other museums and heritage attractions, libraries and archives in compiling evidence for community plans, performance assessment and supporting grant applications.”

The guide may be of use when combining valuation of museums that happen to be located in heritage buildings.

**Mules, T. 2000. Regional Economic Impacts of Tourism in Heritage Mining Towns. In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century* (Conference Proceedings 2000). Canberra: Australian Heritage Commission.**

<http://www.ahc.gov.au/publications/generalpubs/economics/pubs/economics72.pdf>

This study measures the economic impact of tourism activity in three historical Australian mining towns chosen for the study because of their high potential for further development as cultural heritage tourism attractions. At least five hundred interviews were conducted in each town, with information being sought on tourist behaviour, impressions, and opinions as well as expenditure. Expenditure details were collected according to category of expenditure, and regional input output models were used to estimate the multiplier effects of the expenditure on each host region. The results provide useful benchmark data should the towns be placed on a National Heritage Register. The economic value through tourism of such listing could then be measured.

A key aspect of this study is the interest that visitors have in various attributes of cultural heritage. In particular, there is interest in knowing whether visitors' preference is for information, entertainment, authenticity, and education. The findings are of very much interest. For instance: "It seems clear that people would find brief summaries of a place's heritage attractions more useful than a star ratings system, or a designated list such as a national register" —food for thought.

**National Incentives Taskforce for the Environment Protection and Heritage Council. 2004. *Making heritage Happen: Incentives and Policy Tools for Conserving our Historic Heritage*. Adelaide: Environment Protection and Heritage Council.**

[http://www.ephc.gov.au/pdf/EPHC/Summary\\_Making%20Heritage%20Happen.pdf](http://www.ephc.gov.au/pdf/EPHC/Summary_Making%20Heritage%20Happen.pdf)

The purpose of this report is to survey the historic heritage incentives currently offered in Australia and internationally; compare them with incentives for nature conservation; rate their effectiveness; and draw conclusions about potential reforms that should be considered to support Australia's historic heritage. The taskforce starts with the premise that heritage places and objects provide us with cultural and physical links to the past; that they enrich people's experiences and understanding, and reflect the community's sense of identity. Heritage assets provide landmarks that serve as economic development foci and community touchstones; they provide one of the most important tourism drawcards in urban centres and regional areas; they assist small-scale and short-stay regional tourism such as local bed and breakfast businesses, small art and craft galleries and open garden schemes; they attract people and investment by enhancing the amenity or liveability of towns and cities; they contribute to sustainable economic development by creating proportionately more jobs than new construction and providing better local expenditure retention.

The report examines 11 main tools: tax incentives; grants and loans; labour and volunteers; recognition and promotion; client and customer relationships, among others. It provides examples such as that of Nova Scotia, where the provincial government provides a 53 percent rebate on sales tax paid on purchase of building supplies destined

to heritage conservation projects. The bibliography is organized in general themes. This is a well thought out document.

**New Jersey Historic Trust. 1997. *Economic Impacts of Historic Preservation*. Trenton: New Jersey Historic Trust.**

[http://www.state.nj.us/dca/njht/publ/downloading\\_partners\\_prosperity.html](http://www.state.nj.us/dca/njht/publ/downloading_partners_prosperity.html)

For 20 years the State of New Jersey has taken unprecedented steps such as selling public debt to purchase recreational lands and open space. It established a multi-million dollar fund for capital projects at historic sites. As this report says, New Jersey went from being “a state of ruins” to leap into the front ranks of states reinvesting in their history. This document of nearly 500 pages is considered a key resource in heritage valuation studies because of its scope. It is very comprehensive.

The study examines the total economic effects from historic preservation; these encompass both the direct and multiplier effects. The information is well organized and there are many hard facts: “The total economic impacts from the \$123 million spent on statewide historic rehabilitation included: 4,607 new jobs; \$156 million in income; \$207 million in gross domestic product; and \$65 million in taxes. New Jersey garnered about half of these economic benefits, and as a result, captured \$93 million in in-state wealth. The other effects were distributed outside New Jersey.”

There is an introduction and summary at the beginning of each chapter to help reader navigate through the study.

**New South Wales Heritage Office. 1999. *Community-Based Heritage Studies: A Guide*. Parramatta: New South Wales Heritage Office.**

<http://www.heritage.nsw.gov.au/docs/community.pdf>

This is a step-by-step guide to conducting community heritage studies. The main difference between the community-based heritage study and the conventional expert-based model is that the community is not just consulted, but is actively involved in researching and nominating items and in considering recommendations for their future management and promotion. This gives the community much greater ownership of the study process and with it the likelihood of less conflict within the community regarding listing and future management.

The guide emphasizes the importance of having a professionally-produced thematic history. It includes examples of briefs, letters and advertisements.

**New South Wales Heritage Office. 1995. *Guidelines for Heritage Trails*. Parramatta: New South Wales Heritage Office. [http://www.heritage.nsw.gov.au/docs/info\\_heritage\\_trails.pdf](http://www.heritage.nsw.gov.au/docs/info_heritage_trails.pdf)**

From the introduction: “Heritage trails and plaques are an increasingly popular means of promoting an area's heritage. These guidelines are directed mainly at professional officers within local government so that they can develop heritage trails and produce high quality interpretive material with minimum reliance on outside consultants.”



**New South Wales Heritage Office. *Heritage Listing: Benefits for owners*. Parramatta: New South Wales Heritage Office.**

[http://www.heritage.nsw.gov.au/docs/heritagelisting\\_benefits.pdf](http://www.heritage.nsw.gov.au/docs/heritagelisting_benefits.pdf)

This is a pamphlet published in Australia pointing out the ways in which there is growing evidence to support the view that heritage listing has a positive impact on property values, and real estate advertisements are starting to reflect this. Two pages—short and to the point.

**New South Wales Heritage Office. 2005. *Interpreting Heritage Places and Items Guidelines*. Parramatta: New South Wales Heritage Office.**

[http://www.heritage.nsw.gov.au/docs/info\\_interpreting.pdf](http://www.heritage.nsw.gov.au/docs/info_interpreting.pdf)

“This document provides guidance about best practice in heritage interpretation. It applies to all types of environmental heritage: natural and cultural (Aboriginal and non-Aboriginal) and also to movable heritage – any natural or manufactured object or collection of heritage significance. The umbrella term item means a place, building, work, relic, movable object, precinct or landscape.”

This piece is about principles of communication around heritage:

“Items may have a range of values and meanings for different individuals or groups, over time.

“Interpretation is only undertaken within the cultural traditions of which it is part, and respecting the culture of the audience. This approach is easy to recognise and appreciate in relation to Aboriginal heritage, but it also applies to non-Aboriginal heritage.”

**New South Wales Heritage Office. 1996. *Investigating Fabric: guideline from the NSW Heritage Manual*. Parramatta: New South Wales Heritage Office.**

[http://www.heritage.nsw.gov.au/docs/hm\\_investigating.pdf](http://www.heritage.nsw.gov.au/docs/hm_investigating.pdf)

From the introduction: “Heritage items can be viewed as three-dimensional ‘documents’ — the fabric telling an evocative story about a cultural heritage which cannot be gained from records alone. This physical evidence provides an accurate record of what happened rather than what was intended or believed to have happened; and it is for this reason that places of heritage are conserved.”

It is a useful short piece because it addresses the built environment in archaeological fashion.

**Newman, A. and McLean, F. 2004. *Capital and the Evaluation of the Museum Experience*. In the *International Journal of Cultural Studies*. Volume 7(4): 480–498. London: Sage Publications.**

From the abstract: “This article aims to contribute to the understanding of how users of museums and galleries make sense of their experience. In order to do this it analyses the results of a research project that aimed to determine the ability of museums to ameliorate the effects of social exclusion. The results are analysed using the constructs of human,



social, cultural and identity capital. The analysis presents a complex picture that contributes to an understanding of how the visitors to the exhibitions and participants in the community development projects considered made use of them as a context to make investments, which had a range of social benefits. The motivation behind these investments was that they allowed the individuals concerned to understand and in some cases modify the social world around them. This was carried out in response to the needs of those individuals at a particular time, which for the respondents was related to their personal experience of exclusion.”

**Newman, A. and McLean, F. 2004. *The Impact of Museums upon Identity. In the International Journal of Cultural Studies. Vol. 12, No. 1, January 2006, pp. 49–68. London: Sage Publications.***

Abstract: “The aim of this paper is to determine how socially excluded visitors to two museum exhibitions and two museum-based community development projects use that experience to construct individual and social identities. In order to do this it will determine the ways in which the contexts of the exhibitions and community development projects were constructed and how and why visitors and participants make meaning in these contexts. To do this it uses the ‘circuit of culture’ as the basis of an analysis, the moments of which are representation, production, consumption, regulation and identity. The paper concludes that the process of defensive identity activity provides the mechanism through which participants and visitors mitigate their experience of exclusion and provides the basis upon which UK government policy using museums as agents of social inclusion might act.”

**Newman, K.N. 2001. *Historic Preservation Policy and Regime Politics in Atlanta. In Journal of Urban Affairs, Volume 23, Number 1, pages 71-86. Urban Affairs Association.***

From the Abstract: “ This research examines the development of the new historic preservation policy, its effects on neighborhoods and commercial, and its connections to regime theory. Rather than being a failure, historic preservation policy in Atlanta succeeded in balancing the interests of developers, property owners, and preservation advocates.”

**O’Hare, D. 2000. *Articulating the Heritage Tourism Resource in Coastal Towns: a Case Study of Noosa. In Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century (Conference Proceedings 2000). Canberra: Australian Heritage Commission.***  
<http://eprints.qut.edu.au/archive/00005053/01/5053.pdf>

From the abstract: “Despite a wealth of coastal cultural heritage recorded in the registers of the National Trust, State heritage bodies and the Register of the National Estate, only a handful of coastal towns in Australia have capitalized on their heritage for economic purposes such as tourism. One of the key requirements, if the cultural heritage of places is to be drawn on for economic purposes, is for there to be a clearly articulated idea of what the place’s heritage assets are. This paper draws from detailed case study research on the popular Queensland resort of Noosa, demonstrating how this place has articulated

and successfully capitalized on its heritage tourism resource through a very public debate over several decades.”

Noosa, like many small coastal settlements in Australia, owes much of its history of development to the growth of a beach holiday culture in Australia and internationally. This study looks at the process and the qualities that are articulated in the local cultural landscape that can be drawn upon for economic goals and objectives.

**Planning Institute of Australia. 2005. *Submission to the Productivity Inquiry into the Conservation of Australia's Historic Heritage Places*. Kingston: Planning Institute of Australia.**  
<http://203.147.162.100/pia/indigo/filelibrary/generalcontent/Productivity%20Commission%20submission.pdf>

This is a planner's perspective: “Amenity – The ‘design dividend’ captured in careful and constructive conservation practices mainly derives from the amenity generated by long-standing, evolving relationships between people and their place. While this may sometimes be understood in terms of ‘authenticity’, the point is that it often conveys permanence, familiarity and security, values which are highly conducive to ‘inward investment’ and can contribute to the sustainable development of an area.

“Design outcomes – The work of those involved in conservation and heritage can contribute substantially to improved urban design outcomes, both built and cultural. The application of conservation principles and strategies at the conception of urban form is also important in mitigating the process of ‘flexible accumulation’. This phenomena has arguably determined the ‘short design-life’ of buildings reinforcing the apparent severance of physical relationships between people and their city (orplace).

“Resource efficiency – The preservation and reuse of urban form is a significant practice in resource efficiency. Conservation/ Preservation principles/ strategies should seek to inform new buildings and environments thereby contributing to their longevity by becoming more easily adapted and reused in the future.”

Some of the success stories provided are compelling: “The development of ‘BridgeClimb’ on the Sydney Harbour Bridge has been a great success since its commencement on 1 October 1998. BridgeClimb offers a unique experience with much of the commentary while on the climb pertaining to the history of the Harbour Bridge thereby making this part of Sydney's history appealing and accessible to many local and overseas people. BridgeClimb has won 30 awards since its inception including the 2004 NSW Tourism Award, 2004 Travel and Tourism Award and in 2003 the Australian Export Award for Tourism. BridgeClimb is a great example of how a heritage asset can be made into a multi-million dollar tourism business. Some of the revenue is returned to the Roads and Traffic Authority (RTA – the NSW State Government agencies which manages the Bridge). This in turn, has enabled the RTA to fund an Interpretation Plan which assist in further enhancing tourism and increasing the economic returns from the heritage asset. The rental return also assist the RTA in funding conservation and maintenance of the Harbour Bridge.”

**Project for Public Spaces. 2005. *How to Turn a Place Around: A Handbook for Creating Successful Public Spaces*. New York: Project for Public Spaces, Inc.**

This is an enlightened, accessible work on how to create better places that people will use. What makes places great? Why public spaces fail? It proposes an alternative to planning public spaces based on simple principles like: the community is the expert; you must build partnerships; start small and develop a vision. The handbook looks at what makes great places; at understanding how places work. Without being scholarly, this publication suggests the use of more or less ethnographic methods of observation and interviews to put it all together. The approach is very much pertinent to some of the other debates around why historic districts work as places. Highly recommended primer on placemaking.

**Rathje, W. and Murphy, C. 2001. *Rubbish! The Archaeology of Garbage*. Tucson: The University of Arizona Press.**

This groundbreaking resource stemming from Rathje's Garbage Project sets the stage for what landfills can tell us about how we live as a society. It does make mention of waste generated by construction and demolition activities. In the Ten Commandments he proposes, he mentions:

"Taken together, two kinds of garbage—paper and construction-and-demolition debris—account for well over half of America's general refuse. Oddly, they receive far less than their proper share of their publicity attendant upon America's garbage problems"

**Real Estate Research Corporation. 1981. *Economics of revitalization: A Decisionmaking Guide For Local Officials*. Washington: Heritage Conservation and recreation Service (U.S. Department of Interior).**

This is probably one of the best really resources on the benefits of revitalization. It is worth looking at.

**Region 4 DoD Pollution Prevention Partnership. 2002. *Construction & Demolition Waste Management and Sustainable Building Design*. In *Best Management Practices Resource Guide*. Region 4 DoD Pollution Prevention Partnership (United States). <http://www.p2pays.org/ref/13/12935.pdf>**

This American resource compiled through the Department of Defense is surprisingly candid about the information it shares with readers. Anything from the average percentages of debris types that end up in landfills to deconstruction plans and savings realized from that are discussed with guidelines and case studies.

**Reynolds, J. 1997. *Appraising Historic Properties*. Washington: National Trust for Historic Preservation.**

This is a good how-to pamphlet. It surveys basic valuation principles; the valuation process; the sales comparison approach; how to assemble the data; converting gross income into value; and, how to reconcile different valuation approaches, among other things.

**Rypkema, D.D. 2002. *Historic Preservation and Affordable Housing: The Missed Connection*. Washington: National Trust for Historic Preservation.**  
[http://www.nationaltrust.org/housing/Missed\\_Connection.pdf](http://www.nationaltrust.org/housing/Missed_Connection.pdf)

This is as impassioned a plea for the preservation of historic neighborhoods as one will encounter. Rypkema shows us where his heart lies when the affordable housing crisis manifests itself. “Affordable housing is no longer just a social service issue. It has become an issue of urban policy, of environmental protection, of community development and particularly an issue of economic development,” he says. “So can America build itself out of this housing crisis? ... there is one fact-of-life in real estate that must be reckoned with—you can’t build new and rent (or sell) cheap—it can’t be done.” He goes on to say that in the last three decades of the 20<sup>th</sup> century, 6.3 million year-round housing units were lost from the national inventory of older and historic homes. Over 80 percent of these units were single-family residences. “There is today almost universal agreement that the urban renewal demolition of large tracts of downtowns was misguided, self-defeating, and ultimately a failure as a revitalization strategy. The sustained success stories in downtown revitalization today are found in those cities that maintained and reinvested in their historic buildings and recognized their character, quality, and ultimate durability.

Rypkema invites us to look at historic neighborhoods without the lens of the educational, cultural, social and architectural values of preservation, but rather, to look at the needs of families: over 40 percent of residents in older and historic neighborhoods are within five miles of work. Less than one in four residents in new housing is that close to their place of employment. Over two thirds of older and historic neighborhoods have an elementary school within one mile. Less than 40 percent of new construction does. Over 60 percent of houses in older and historic neighborhoods have shopping within one-mile. Barely 40 percent of new houses do. Rypkema proposes ten thought-provoking policy initiatives for older and historic neighborhoods. He urges us to act on them now.

**Rypkema, D. D. 1997. *Historic Preservation and the Economy of the Commonwealth: Kentucky’s Past at Work for Kentucky’s Future*. Washington: National Trust for Historic Preservation.**

“Economic development professionals, elected officials, business leaders, and economists today all talk about the importance of the diversification of the Kentucky economy. Typically, diversification means moving away from an over-dependence on one or two industries—coal and tobacco as prime examples in Kentucky. Diversification also means geographic diversity—that economic development needs to take place in every corner of the Commonwealth. A third level of diversification is economic activity on all scales—from multimillion dollar manufacturers to one person service businesses. Kentucky’s historic buildings provide the context for diversified economic development on all three of those levels: industry, geography and scale. Utilizing each community’s unique historic resources can enhance the local economy without diminishing the opportunity to do the same in the adjacent town and actually enhances the ability of a community to attract investment.”

**Rypkema, D.D. 2003. *The Economics of Rehabilitation*. Washington: National Trust for Historic Preservation.**

The purpose of this booklet is to assist preservationists in making the economic benefit argument, Rypkema states at the onset. In an accessible way, he introduces the reader to the world of real estate and some of the terminology it employs. Terms like leveragability, capital appreciation and amortization are explained. He then addresses the myths and realities in the comparison of rehabilitation and new. Quoting studies from a range of sources, he comes up with clear analyses like this one: “if no demolition is required, a major commercial rehabilitation will probably cost from 12 percent less to 9 percent more than the cost of comparable new construction with the typical cost saving being about 4 percent.” He goes on to say that if new construction requires the cost of razing an existing building, the cost savings from rehabilitation should range from 3 percent to 16 percent. This pamphlet dispels 19 such myths. He then proceeds to analyze an actual situation where a developer is trying to decide whether to acquire and rehabilitate an actual structure or raze the existing building and erect a new one. His intent is to give a preservation advocate the resources to help a developer make his or her decision. As the threat of demolition looms, Rypkema lists economic reasons to reinvest in the property: It can generate tax credits and establishes a new and higher depreciation schedule; it extends the property’s economic life. And there are public economic benefits as well: from enhanced quality of life to increased property values. Historic preservation makes sense from an economic development point of view and at the end the author proposes a series of 19 realities to replace the shattered myths of earlier on.

**Rypkema, D.D. 1995. *Virginia’s Economy and Historic Preservation The Impact of Preservation on Jobs, Business, and Community*. Washington: National Trust for Historic Preservation.**

This publication looks at the economic benefits of historic preservation in Virginia:

“In the past ten years, twenty small Virginia “Main Street” communities with populations under 50,000 have seen over \$54 million of private funds invested in the rehabilitation of over 1600 buildings.”

One result: new businesses and new jobs: the investment of over \$350 million in the rehabilitation of some 900 income-producing buildings across the state in the past 15 years through the federal Historic Rehabilitation Tax Credit has provided Virginia with 12,697 jobs and an increase in household income of nearly \$275 million.

On the tourism front, there are compelling arguments as well:

“Historic preservation visitors stay longer, visit twice as many places, and spend, on average, over two-and-a-half times more money in Virginia than do other visitors. The economic impact alone on Virginia’s economy is over half a billion dollars a year.”

**Rypkema, D.D. 1998. *Profiting From the Past: The Impact of Historic Preservation on the North Carolina Economy*. Washington: National Trust for Historic Preservation. <http://www.presnc.org/learnmore/newsletters/winter1998b.html>**

“What we have learned in this analysis is that the economic impact of preservation is significant, complex and widespread.

Here are some of the highlights:

- Since 1976 the federal tax incentives for the rehabilitation of designated historic structures have been used in 732 private-sector, income producing development projects representing nearly 25,000 jobs, \$500 million in household incomes, and a total economic impact on the North Carolina economy of over \$1.5 billion.
- The North Carolina Main Street program—downtown revitalization in the context of historic preservation—has led to 676 business expansions, 3,400 new businesses, 1871 restored facades, 1,500 building rehabilitations, and 7,200 new jobs—in all, \$450 million in new investment.
- Tourism is now the second largest industry in North Carolina with employment of 161,000 people and \$2.5 billion in annual payroll— and the number one reason visitors come to North Carolina is this state’s historic resources.
- The crafts industry in western North Carolina employs 4,000 crafts workers and artists and adds \$48 million annually to those household incomes. While the craft industry is not “historic preservation” per se, often the most effective sites from which to sell those crafts are western North Carolina’s historic buildings and downtowns.
- Likewise, the movie industry isn’t “historic preservation,” but the fabric of the state’s historic commercial areas and residential neighborhoods is a significant draw for the movie industry which has had direct expenditures of \$4.6 billion in North Carolina since 1980.”

**Shanks, M., Platt, D. and Rathje, W.L. 2004. *The Perfume of Garbage: Modernity and the Archaeological*. In *Modernism/Modernity, Vol. 11, Number 1, January 2004*. Baltimore: John Hopkins University Press. Available online, search The Perfume of Garbage.**

This brilliant essay invites us to explore our contemporary built, manufactured and discarded environment archaeologically: from the archaeological dimensions of 9/11 to building “layers” that change at varying rates.



**Shipley, R. 2000. Impact of Heritage Designation on Property Values. In *International Journal of Heritage Studies*. Vol. 6 Number 1. Taylor and Francis.**  
[http://www.fes.uwaterloo.ca/research/hrc/pdf/p\\_value.pdf](http://www.fes.uwaterloo.ca/research/hrc/pdf/p_value.pdf)

Abstract: “ This paper describes research that was designed to examine the assertion that historic designation of properties, under the heritage designation in Canada’s largest province, has a negative impact on the values of those properties. The actual selling price of subject properties was used to establish their value history trends, which were then compared to ambient market trends within the same communities. Almost 3,000 properties in twenty-four communities were investigated, in what is believed to be the largest study of its kind ever undertaken in North America. It was found that heritage designation could not be shown to have a negative impact. In fact there appears to be a distinct and generally robust market in designated heritage properties. They generally perform well in the market, with 74% doing average or better than average. The rate of sale among designated properties is as good or better than the ambient market trends and the values of heritage properties tend to be resistant to downturns in the general market.”

**Shipley, R., Parsons, M. and Utz, S. 2005. *The Lazarus Effect: An Exploration of the Economics of Heritage Development in Ontario*. Toronto: The Architectural Conservancy of Ontario.** <http://www.fes.uwaterloo.ca/research/hrc/lazarus-jan20-verA.pdf>

In the Executive Summary the Conclusions state that most of the buildings that are being given new life in Ontario are private sector projects; there is a healthy and growing business in heritage development; much of the work falls outside the formal heritage process of identification and designation; improving the formal heritage process in order to provide a measure of certainty, protection and financial incentives would help stabilize the field; heritage advocates do not always recognize their allies in the development world; municipalities receive excellent compensation for incentives or tax relief granted to heritage developments; this comes in the form of increases in property value and local tax assessments.

**South Carolina Department of Archives and History. 2002. *Historic Districts Are Good for Your Pocketbook: The Impact of Local Historic Districts in South Carolina*. Columbia: South Carolina Department of Archives & History.**  
<http://www.state.sc.us/scdah/propval.pdf>

This well put together pamphlet is a good example of a communications tactic aimed at influencing perceptions around the benefits of heritage preservation, based on sound information. It provides an overview of the results from four studies in South Carolina jurisdictions aiming to answer a question frequently asked by homeowners in potential local historic districts: “will historic preservation zoning lower our property value?”. The findings were very positive. In Columbia, house prices in local historic districts increased 26% per year faster than the market as a whole. In Beaufort, houses in the locally protected historic district sold for 21% more, all other factors being equal, than similar houses not in the district. In Greenville, establishing a local historic district caused houses prices to go up on average just over 50% in just a few years. The methodology for the study is presented in an engaging way.

The actual questions are listed along with a short presentation of the context for each jurisdiction. Key study author comments are presented, such as (John Kilpatrick) “the influence of historic district designation appears to be continuous over time. In other words, the economic benefits of designation do not flow only to the owners at the time of the preservation ordinance. Rather the benefits appear to flow to subsequent owners as well.” Clear, very useful piece.

**Sydney Engineering Heritage Committee. 2005. *Submission to the Inquiry into the Policy Framework and Incentives for the Conservation of Australia's Historic Built Heritage Places*. Sydney: Sydney Engineering Heritage Committee.**  
<http://www.pc.gov.au/inquiry/heritage/subs/sub164.pdf>

From the Relevant Points section: “Engineering and industrial heritage are significant areas of heritage that are often overlooked and unappreciated. Virtually every facet of our lives owes something to engineering. Our industries, our transport, communication, health, food, water supply and sewerage systems, our buildings in terms of their structure and services, entertainment, and the convenience and comfort of our homes - all rely to a greater or lesser extent on engineering. However, much of this technology is not spectacular or of great aesthetic appeal. Much of it is hidden from view (water and sewerage systems) and because it is commonplace and considered utilitarian, items tend to be discarded and replaced when worn out or no longer wanted. Their heritage value can thus be easily overlooked.”

The submission makes its case effectively as it points out that engineering and industry are an important part of our cultural heritage, and as well as having obvious heritage value, they can amongst other things: demonstrate the stages of technological development; aid understanding of the history of society and the influences on its growth and development; and, demonstrate the nature of work, and changes in working conditions and practices.

**Stynes, D. J., Vander Stoep, G. and Sun, Y.-Y. 2004. *Economic Impacts of Michigan Museums*. East Lansing: Michigan State University.**  
<http://www.pr.msu.edu/miteim/ExecSumMiMuseums.pdf>

Aiming to document the impacts of Michigan museums on state and local economies, on the heel travel industry findings reporting that as many as 65% of adult travelers included a cultural activity or event on trips of 50 miles or more, this document is an honest, if uninventive, statistical analysis. As such, it provides a useful model for conducting these types of studies. It recognizes that heritage/cultural activities are frequently a part of general purpose and vacation trips, particularly those involving long stays away from home. The authors recognize the need for more focused research to identify the unique contribution of heritage/cultural facilities in generating trips and spending.

**Tasmanian Government. 2005. *Submission to the Productivity Commission - Inquiry into the policy framework and incentives for the Conservation of Australia's Historic Built Heritage Places*. Tasmanian Government.**

<http://www.pc.gov.au/inquiry/heritage/subs/sub164.pdf>

From the introduction: “Historic heritage is a critical element of Tasmania’s identity. Its extensive built heritage and places of historic heritage significance, as well as its significant Aboriginal heritage and natural heritage dating back to Gondwana land, make Tasmania unique. Tasmania is home to a significant proportion of the nation’s pre-1840s built heritage and the most complete convict heritage, both physical and cultural, in the country. Tasmania’s unique historic heritage attracts significant community interest and support, and is a key part of Tasmania’s brand. This, in turn, makes it of core interest to Tasmania’s tourists, and as a key component of a tourism industry which contributes \$1.7 billion annually to the Tasmanian economy, it is a strong economic driver for the State. Research undertaken into the Tasmanian brand in April 2005 indicates the key associations with Tasmania include: pristine, green, natural, clean; and, step back in time, different.”

**The Royal Australian Institute of Architects. 2005. *A New Vision for Built Heritage: Submission to the Inquiry into the Policy Framework and Incentives for the Conservation of Australia's Historic Built Heritage Places*. Manuka: Royal Australian Institute of Architects.**

[http://www.architecture.com.au/i-cms\\_file?page=4104/Heritage\\_response.pdf](http://www.architecture.com.au/i-cms_file?page=4104/Heritage_response.pdf)

From the Executive Summary: “This response examines the current status of built heritage in relation to the role and membership expertise of the RAIA. It will address a number of fundamental areas in policy and direction that will ultimately determine the future of built heritage in Australia. Firstly it will explore questions as to the nature and benefit of heritage and the need for its conservation, secondly the economic results and potential stimulators for development of heritage properties and lastly directions for the improvement of conservation outcomes.

“In particular it explores the importance of Cultural Tourism and its potential as an economic driver, the need for case studies and guidelines that assist the development sector and the creation of taxation and in kind incentives to encourage the maintenance and enrichment of heritage places and focuses on heritage of the future. Finally, it shows how significant is the need for a shift in government policy which sees a new and inclusive vision for Heritage. Such a vision will ensure that the heritage of tomorrow is not destroyed by the ignorance of today.”

**Throsby, D. 2000. Conceptualizing Heritage as Cultural Capital. In *Heritage Economics: Challenges for Heritage Conservation and Sustainable Development in the 21<sup>st</sup> Century* (Conference Proceedings 2000). Canberra: Australian Heritage Commission. <http://www.ahc.gov.au/publications/generalpubs/economics/economicjump.html>**

From the abstract: “this paper reviews recent developments in the theory and methodology involved in the evaluation of cultural heritage. Economists traditionally identify three types of capital: physical capital, human capital and natural capital. Recent suggestions that a fourth type of capital should be recognized, namely cultural capital, are reviewed. Cultural capital is defined as an asset embodying or yielding both economic and cultural value. The paper considers the means by which these types of value may be assessed and considers the implications of such assessment for investment decisions in heritage projects. The concept of sustainability in the management of cultural capital is also discussed, drawing parallels with the treatment of natural capital in ecological economics.”

The author lists possible components of cultural value as: aesthetic value; spiritual value; social value; historical value; symbolic value and authenticity value. He concludes that the concept of value, from an economist’s perspective, requires the recognition of both the strengths and limitations of traditional economic concepts and methods. The phenomenon of cultural value is of critical importance to this, he concludes. A significant article.

**Vines, E. 1998. *Street Smart: Corporate Development In Historic Town Centres*. Parramatta: New South Wales Heritage Office. <http://www.heritage.nsw.gov.au/docs/ssmart.pdf>**

From this Australian resource: “This document provides a framework policy for corporations, local government and the community to assess and guide the introduction of new businesses into established townscapes which have heritage character.

“Community awareness of both the social and economic value of historic town centres has risen substantially over the last 20 years. There are now many examples where physical improvements to heritage precincts have led to dramatic turnarounds in the economic fortunes of formerly depressed environments.

“The revolution in Australian eating habits, accompanied by the introduction of outdoor cafes, has changed the nature of street character and use. Streets have become outdoor rooms for the whole community. Australia's temperate climate encourages outdoor eating, street life and social activity.

“The document mentions the relevance of townscape context, a result of spatial patterns set by the relationship between buildings and their settings. It includes features such as setbacks, heights, overall form, landscaping, vistas, landmark buildings and topography. It notes that the essence of this character should be recognized and repeated in any new corporate development.”

**Vines, Gary. 2006. *Submission to the Productivity Commission into Historic Heritage*. Individual submission. <http://www.pc.gov.au/inquiry/heritage/subs/subdr264.pdf>**

This is a personal submission by a consulting historical archaeologist who actually prepared a submission as a result of a mutual exchange with myself about his disillusionment with the work of the Productivity Commission in Australia. Here is an excerpt from his submission:

“If historic heritage is to be considered a "market" then all aspects that contribute to that market should be considered and valued. Much wider definitions of productivity and value need to be included in assessing the ‘economic, social and environmental benefits and costs of conserving Australia’s historic built heritage’.

I believe that the value of heritage should not be determined by monetary measures, but if financial costs and benefits are considered, then they should be expanded to include the ultimate economic and financial values of aspects such as the social, community and aesthetic values to such historic heritage contributes.

Despite my comments about the dangers of ascribing a purely monetary value, historic heritage is now an established “product” with a measurable dollar value in many circumstances. It is used as a marketing tool for real estate, tourism, hospitality, recreation and a wide range of consumer products.

Heritage-based tourism and people seeking the authenticity of a country lifestyle have seen the revival of many country towns such as Maldon, Beechworth, Clunes, Daylesford, Chiltern, Koroit, Port Fairy, etc. etc., which 10-20 years ago had shrinking populations and economies, and were visibly decaying.

Critical to realising the benefits of a vibrant heritage segment, is a sound basis in the accurate assessment and meaningful understanding of what our heritage is, and the best way to manage it.”

**Wills, P. and Eves, C. Newall. 2005. *Heritage Australia: A Review of Australian Material Regarding the Economic and Social Benefits of Heritage Property*. Parramatta: New South Wales Heritage Office. [http://www.heritage.nsw.gov.au/docs/benefits\\_heritage05.pdf](http://www.heritage.nsw.gov.au/docs/benefits_heritage05.pdf)**

This is a well organized resource that surveys: factors affecting the benefits of heritage property; markets and valuation methods; methods of measuring benefits; cost benefit analysis; the hedonistic pricing method; the travel cost method; and the contingent valuation method. It also includes a section titled: Abstracts of Significance, containing a number of pertinent entries—many of which are also covered in this bibliography.

**Winistorfer, P. and Chen, Z. 2004. *Energy Consumption And Associated Greenhouse Gas Emissions Related To Deconstruction And Demolition Of A Residential Structure (review draft)*. Blacksburg: Virginia Tech.**  
<http://www.corrim.org/reports/2005/swst/128.pdf>

From Summary and Conclusion: “Two virtual houses were demolished after 75 years of service. The weight of the two-story house with 2,062 ft<sup>2</sup> of livable space located in Minneapolis was 86,000 kg with wood frame and 89,000 kg with steel frame, and the weight of one-story house located in Atlanta with 2,153 ft<sup>2</sup> of living space was 97,000 kg with wood frame and 106,000 kg with concrete frame. The recycling rate was assumed as 30% and landfill was assumed to be 20 miles from the housing site for both locations. The energy required to move the debris to landfill is 5.7 GJ for the Minneapolis wood frame, 5.9 GJ for the steel frame, 6.5 GJ for the Atlanta wood frame and 7.0 for the concrete frame. These numbers ranging from 2.8-3.3 GJ per ft<sup>2</sup> are in general agreement with the 0.703 kWh/ft<sup>2</sup> (2.5 GJ/ft<sup>2</sup>) that is suggested by the US advisory council on historic preservation (National Trust for Historic Preservation 1981). Emissions during demolition and transport to the landfill were estimated to be 435 kg of CO<sub>2</sub> for the Minneapolis wood frame house, 448 kg for the steel frame and 491 kg for the Atlanta wood frame house and 533 kg for the concrete frame.”

**Xie, P.F. 2003. *Visitor’ Perception of Authenticity at a Rural Heritage Festival: A Case Study*. In *Event Management, Vol. 8 Number 3*. Cognizant.**

Abstract: “Rural Festivals have become increasingly important for creating recreational experiences, revitalizing isolated towns, and generating higher revenues. This article explores visitors’ perceptions of authenticity regarding the Applebutter Festival in Grand Rapids , Ohio, as recorded by responses to a visitor survey. The results show that although visitors express strong interest in heritage festival and contribute significant economic impact to the festival, their perceptions of authenticity of the heritage resources remain superficial. Statistical analysis indicates that a stereotypical view of heritage was common and not all visitors regard heritage as a high priority. The recommendations for the future development of rural festivals are proposed based upon the findings.”

**Zuzanek, J., Luscott, B. and Beglo, J.N.. 1996. *Heritage Preservation: Tradition and Diversity - An Annotated Bibliography*. Waterloo: Otium Publications.**

This is a great resource that the author brought to my attention and which I ended up buying because it has such a Canadian flavour to it. At 343 pages, it is comprehensive. It is organized by subject headings like Heritage Preservation and Urban Planning; Saving Old Buildings, Streetscapes and Neighbourhoods: The Magnificent Obsession; Economics of Heritage Preservation; Selected Scholarly, Professional, and General Circulation Periodicals Covering Heritage Preservation Issues.