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Approaches to sustaining people–place bonds in conservation planning: from value-based, living heritage, to the glocal community

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Abstract

This review paper explores approaches to sustaining the enduring connection between communities and heritage places in conservation planning. Amidst global overtourism, the gradual outmigration and sudden displacement of local communities from heritage places disrupt not only physical ties between people and places but also shared traditions, memories and emotional bonds. These intangible qualities constitute the social dimension of heritage and are pivotal to its cultural significance. However, existing conservation approaches to safeguarding this social dimension often rely on the continued presence of local communities, which may yield limited effectiveness in restoring people–place bonds amidst challenges posed by overtourism and displacement. This review unpacks the term 'social value' within the framework of value-based assessment and progresses towards a dynamic conception of 'sense of place'. In response to the changing social composition of 'local communities' at heritage places, this review examines approaches for conserving the social dimension of heritage, aiming to sustain the enduring continuity of people–place bonding. It proposes a broader definition of 'sense of place' that transcends the preconceived notion of stakeholder groups as a geographically defined community and suggests leveraging digital social platforms to re-establish these bonds. The review concludes by advocating for the 'glocal community' approach, acknowledging the personal emotional connections that individuals form with a heritage place regardless of their places of residence. This approach has the potential to complement existing methods, such as value-based assessment and the living heritage approach, which are commonly practised in contemporary conservation efforts.

Keywords social value, sense of place, continuity, conservation area, community, urban conservation

1 Introduction

The escalating issue of overtourism has become an increasingly conspicuous phenomenon, exerting pressure on the conservation of physical remnants, social fabric, and cultural customs in the historic environment. Over the past few decades, cultural tourism, which is widely recognised as a lucrative and mass-market industry, has been viewed as a double-edged sword by the heritage management community. On the one hand, the augmented revenue derived from tourism serves as a compelling political and economic justification for financing heritage conservation and management,

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notably the restoration of tangible heritage (McKercher and Du Cros 2002). On the other hand, the surge in tourism activities propelled by economic advancement has adversely presented a precarious threat to the retention of local communities and even the survival of heritage assets. Cities such as Venice, Barcelona, and Dubrovnik stand as prime examples of places that are experiencing a decline in their long-term resident populations, which is a phenomenon attributed partly to overtourism and partly to associated factors such as escalating housing prices and diminished quality of life (Trancoso González 2018, Hospers 2019, Abbasian et al. 2020). The World Tourism Organization (UN Tourism) has defined overtourism as 'the impact of tourism on a destination or parts thereof, that excessively influences perceived quality of life of citizens and/or quality of visitors experiences in a negative way' (World Tourism Organization et al. 2018, 4). As tourism traffic intensifies, concerns surrounding the consequences of overtourism have centred on the metamorphosis of historic 'places' into tourist 'attractions', eroding the authenticity of historic places and severing the bonds of local communities to these places. In response to these challenges, UN Tourism has underscored the importance of prioritising the sustained involvement of local communities and their emotional connections to their respective locales (World Tourism Organization et al. 2018). This recognition of people–place bonding highlights the delicate interplay between promoting tourism and safeguarding heritage places while nurturing the well-being of the communities residing therein.

While overtourism often triggers a gradual decline in the local population and weakens people–place bonds, the government-led displacement of local residents considerably severs the connections between individuals and their places. This issue is particularly acute in China, where the disruption in people–place ties largely results from heritage-led regeneration, predating the surge in tourist activities in historic areas. The displacement of residents from historic districts appears to be an inevitable and imperative step in China's conservation practices, which are rooted in the country's legacy of socialist policies. The transition from private housing to socialist housing and workers' accommodations was set in motion starting with the socialist housing reform in 1949 (González Martínez 2019). Subsequently, the 1982 constitutional declaration that established state ownership over all urban land and heritage properties was enacted (The National People's Congress of the People's Republic of China 1982). These policies entrenched property rights forfeitures, displacement of original families, and the conversion of numerous single-family traditional houses into multifamily dwelling units. Individuals were relocated from their ancestral homesteads to allocated accommodations where ownership rights were not granted. A significant urban population resided in subdivided dwelling units carved from traditional courtyard houses, mansions, and shophouses. By the 21st century, relocating these then-displaced-but-now-established local communities had become a fundamental precursor for regeneration, aiming to catalyse gentrification. This phenomenon has been observed across numerous heritage-led regeneration projects, especially in economically developed metropolises such as Beijing and Shanghai (He and Wu 2005, Shin 2010, Ludwig et al. 2020, Zhu and González Martínez 2022).

The displacement of long-term residents in China has invariably been facilitated by public–private partnerships and has had far-reaching impacts on both the physical and social fabric of historic neighbourhoods and cities. The dominant public–private partnerships model, which has been in place since the 1990s (Ruan and Liu 1999), typically involves local governments appropriating property and offering relocation compensation. Government-led property acquisition and relocation efforts pave the way for developers and mostly state-owned enterprises in the private sector to initiate physical regeneration in the name of the common good, all while generating profits. However, these forced evictions have ramifications that extend beyond severing physical ties. They erode local traditions, shared memories and social cohesion, which are integral elements representing the social dimension of heritage and the cultural significance of historic places. Notably, in the early days of China's conservation practices, the relocation of local communities often preceded the demolition of structures, such as the hutong courtyard dwellings in Beijing and the Lilong housing in Shanghai (He and Wu 2005, Shin 2010). This resulted in the irreversible loss of traditional lifestyles, place memories and material authenticity. In some cases, to create distinctive historic urban landscapes, conservation has often been accompanied by fabrications and, occasionally, inventions of traditional architecture (González Martínez 2016, Peng 2017, Fu and Hillier 2018, González Martínez 2019). While recent approaches to conservation have sought to preserve most of the existing physical structures and, in some cases, the social fabric, the challenges of overtourism remain and present ongoing hurdles.

Similar to historic cities in China, many global destinations facing the challenges of overtourism also face a related critical dilemma: how to preserve the intricate social dimension of heritage and maintain connections between people and places in the absence of long-standing communities. This review paper aims to explore a range of approaches that contribute to retaining and restoring people–place bonds within conservation

planning. Since the inception of the *Burra Charter* in 1979, the scope of the conservation agenda has broadened to emphasise the social dimension of heritage (ICOMOS Australia 2013, Jones and Leech 2015). It transcends the conventional notion of heritage as a 'site', recognising it as a socially constructed 'place'. This aligns with the current prevalent understanding that 'the heritage we define and seek to protect is what we make it' (Pendlebury 2008, 214), highlighting heritage as 'a social process' (Smith 2006, 42) or a 'social action', wherein it is 'something that people create and use actively to maintain the connections between themselves and other places and things' (Smith 2006, 42, Pendlebury 2008; Harrison 2010, 38; ICOMOS Australia 2013). This shift in perspective highlights the importance of understanding how individuals value the intrinsic qualities of a place, thereby elevating the concept of 'social value' to a status equivalent to historical, aesthetic, and scientific values in the framework of value-based assessments (Jones 2017). However, while the notion of social value has undoubtedly contributed to our understanding of the 'cultural significance'—i.e., the sum of heritage values—attributed to material heritage, its practical application appears limited in fully capturing the multifaceted fabric of people–place relationships. These limitations become particularly evident when faced with the challenges posed by overtourism and the pervasive influence of social media and the Internet, both of which have transformative effects on these intricate relationships.

2 Understanding 'social value'

2.1 Its historical origins, definition and evolution

In contemporary heritage management, the incorporation of social aspects into conservation policies and practices has given rise to the concept known as 'social value' within the framework of value-based assessments (Avrami et al. 2000, Hobson 2004, Gibson and Pendlebury 2009, Jones and Leech 2015). However, the recognition of the social aspects of heritage can be traced back to the inception of modern conservation philosophies.

In the 19th century, John Ruskin championed the idea that the true significance of historic buildings extended beyond their original fabric and physical structures. Ruskin (1866, 216) emphasised that '[t]he greatest glory of a building is… in its age, and in that deep sense of voicefullness' and the living spirit that historic buildings inherently possess. He argued that the 'possess of life' and the 'passing waves of humanity' constitute the profound essence of historic buildings, as human experiences shape and give meaning to a building over time (Ruskin 1866, 216). This perspective illuminates the holistic view of heritage conservation, which encompasses both the tangible and intangible aspects of a place. Ruskin valued the intangible qualities a place holds, which is nowadays known as 'social value'. His critique of 'restoration'—as 'the most total destruction which a building can suffer' and an attempt 'as impossible as to raise the dead' (Ruskin 1866, 224)—suggests his caution against the use of conservation treatments that erase the traces of past lives and stories. His advocacy for retaining the layers of human intervention in buildings over time signifies his emphasis on human connection with the historic environment. This connection encompasses personal experiences, individual memories and social interactions associated with historic buildings. Debatably, Ruskin would likely interpret 'social value' in contemporary conservation practices as the living essence of heritage sites, encompassing their ability to evoke a sense of connection, belonging, and shared history among individuals and communities. His philosophical belief in conservation practices underscores the imperative of safeguarding both the physical fabric and the intangible threads of meaning that link people to the past, fostering an enduring bond with the historic environment they inhabit.

Moving into the early 20th century, the Austrian conservationist Alois Riegl pioneered the categorisation of heritage values, sowing the seed for value-based assessment, which became prevalent at the end of the century (Jokilehto 1999, Ahmer 2020, Pendlebury and Brown 2021, Brown, Davidovic, and Hasan 2021). However, throughout the first half of the 20th century, social aspects gradually lost prominence within the conservation agenda. The introduction of the Venice Charter (ICOMOS 1964) and the World Heritage Convention (UNESCO 1972) solidified a canon that centred on the original fabric and material authenticity, while recognising historical, aesthetic, and scientific qualities as the core heritage values. It was not until the mid-1970s that the social aspect of heritage regained its position of prominence in conservation debates and practices. The release of the *Burra Charter* by the Australia International Council on Monuments and Sites (ICOMOS) in 1979 reintroduced the social dimension of heritage into the conservation framework. This marked the inclusion of social value as a critical component in the assessment of 'places of cultural significance' (ICOMOS Australia 1999, Jones 2017). The subsequent revision and refinement of this document in 1999 is widely acknowledged as a key milestone that firmly established 'social value' as a distinct category for evaluating cultural significance (ICOMOS Australia 1999). As defined in the *Guidelines to the Burra Charter*, '[s]ocial value embraces the qualities for which a place has become a focus of spiritual, political, national or other cultural sentiments to the majority or minority group' (ICOMOS Australia 1988, Article 2.5).

Originally published as a piece of national legislation in Australia, the *Burra Charter* garnered global attention for its recognition of cultural heritage extending beyond physical forms and structures. It shifted the perception of heritage from a static 'site' to a dynamic 'place' enriched with both 'tangible and intangible dimensions' (ICOMOS Australia 2013, Article 1.1). This place-oriented terminology gained traction and became prevalent in subsequent international charters, conventions, national heritage legislation, and conservation principles. For instance, *The Convention on the Value of Cultural Heritage for Society*, known as the *Faro Convention* (Council of Europe 2005a), extends the concept of a heritage community to encompass not only heritage professionals but also individuals who share humanist values or historical ties with the place. Although the *Faro Convention* does not explicitly elaborate the notion of social value, the emphasis on the 'commonplace heritage of all people' underscores the consideration of social aspects (Council of Europe 2005b, 4).

At the national legislation level, heritage legislation has also begun to incorporate social values into the process of designation, assessment and management. Countries such as Australia, Belgium and the United Kingdom have launched various initiatives to engage the general public in identifying, assessing and designating historical buildings and sites that are of historical interest at the local level (Byrne et al. 2003, Ludwig 2016, Lesh 2019; Augustiniok et al. 2022). Notably, the integration of 'social value' into legislation empowers local stakeholders, often nonexperts, to actively participate in decisions relating to heritage designation and management. The *Conservation Principles* established by English Heritage (later succeeded by Historic England), for example, exemplify the growing emphasis on the social value associated with heritage (English Heritage 2008). Drawing inspiration from the philosophy and concepts of the *Burra Charter*, the *Conservation Principles* employ a broader term: 'communal value'. This term is one of the four core values, alongside evidential, historical, and aesthetic values, that contribute to the cultural significance of a place. The term encompasses 'the meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory' (English Heritage 2008, 31). Within the broad category 'communal value', 'social value' is a subcategory that stems from 'the resonance of past events in the present, providing reference points for a community's identity or sense of itself'. Notably, it is 'less dependent on the survival of historic fabric' and can persist even if the original physical structures and materials are replaced, as long as the social and cultural characteristics of the place are met (English Heritage 2008, 32). The impact of the *Burra Charter* is evident in how it has reshaped the discourse on cultural heritage, foregrounding the significance of human connections to places over time, akin to the sentiments expressed by Ruskin.

In China, the legislative system of conservation has been developed since the promulgation of national heritage law in 1982, and recent policies have undergone changes to address the significance of public participation practices. In line with national heritage law, the revision of the *Principles for the Conservation of Heritage Sites in China* issued by ICOMOS China in 2015 expanded the depth of 'social value' in cultural significance assessment. This document parallels the *Burra Charter* with its emphasis on place-oriented heritage planning. However, the term 'social value' in the *China Principles* is explained as the 'social benefits' of cultural heritage in its history and dissemination of meaning to society (ICOMOS China 2015, 6–7). Unlike the *Conservation Principles* in the UK, which draw attention to how people value a place, the *China Principles* focus more on the physical fabric and historical facts and why heritage is important to society. Although the *China Principles* place different emphases on social values, it shares the position of the *Faro Convention,* which states that '(the) heritage community of people who value specific aspects of cultural heritage' should be engaged in the conservation process (Council of Europe 2005a, ICOMOS China 2015). In recent planning legislation in China, the need for public participation in the process of plan-making has increasingly been observed as a result of the policy shift from large-scale demolition towards incremental regeneration. For instance, the *Regulations on Conservation of Beijing Historic City* issued in 2021 stress that intangible features such as traditional lifestyles and local knowledge are crucial for sustaining the continuity of heritage places, and active engagement with local communities is mandated in the document (Beijing Municipal People's Congress 2021, Article 67).

2.2 Social value in question

Despite a renewed interest in the social dimension of heritage, the application and assessment of social value in real-world practice has proven problematic in three aspects.

First, in the field of value-based assessment, social value is still largely determined by heritage professionals rather than by the general public. Indeed, social value has been recognised as a fundamental heritage value that encapsulates the intangible connection between people and heritage places. However, social values have always been linked to, and to some extent subordinated to, aesthetic and historical values. Although social value has gained resonance in international charters and national legislation, it has rarely (if ever) stood alone as the sole

justification for listing a property as a heritage asset (Waterton et al. 2006, Gibson and Pendlebury 2009, Pendlebury 2012, Wang et al. 2015). Undeniably, there has been an inevitable discrepancy between experts and the general public in terms of how the significance of a place is appreciated. In practice, social values are usually derived from surveys that measure people's perceptions, experiences or memories of a heritage place. In many cases, however, these perceptions are not explicitly recognised as social values; rather, they are employed as raw material for value assessment from the perspective of heritage professionals. The assessment of a historic place by experts may not consistently align with the varied perspectives within a diverse society, thereby posing challenges to the conservation of social value, especially when long-standing communities have been relocated elsewhere and gradually become detached from the heritage place where they formally reside. These challenges potentially raise questions about the validity of social value in capturing the bonds that people share with these places (Waterton et al. 2006, Poulios 2014a, Jones and Leech 2015).

Second, while the *Burra Charter* conceptualises social value as a place-based concept, places are in fact dynamic entities, and the values associated with them are subject to individual perceptions (Worthing and Bond 2008). Originally defined as the 'collective attachment to places', social values represent the aggregated perceptions shared by place-based communities and should be assessed with a set of 'historical attachments' (Johnston 1992, 10). On the one hand, the physical conditions of a place may be constantly evolving due to factors such as new development, regeneration and accumulated incremental change; for this reason, the place meanings attached by local communities are evolving and somewhat transitory, as no historic cities, towns or districts could be perfectly preserved. On the other hand, the meanings captured may not be explicitly expressed or universally agreed upon. This complexity is vividly illustrated by the paradox of two housing estates in England: the conservation of the less-favoured Park Hill council housing in Sheffield and the demolition of the beloved Robin Hood Gardens estate in London (Forbes 2009, Bell 2012, Wang 2012, Thoburn 2018). The controversy surrounding postwar housing heritage in England highlights that 'the social values of places are not always clearly recognised by those who share them, and may only be articulated when the future of a place is threatened' (English Heritage 2008, 32). Therefore, it is questionable whether social values can critically reflect the dynamic nature of a place, as they represent experts' assessment of the meanings attached to a place by a community at a particular moment in time, which are ephemeral, lack consensus and are likely to evolve continuously over the years.

Third, the conventional notion of social value, which is rooted in a place-centric perspective, has become increasingly questionable, as local communities or legitimate stakeholders have gradually disappeared from a place due to the displacement of long-term residents and/or the escalating problem of overtourism. The changing demographic composition of a community, driven by factors such as physical regeneration and gentrification, further complicates this matter. The evolving nature of social values necessitates ongoing reassessment; however, the practicality of conducting frequent reassessments of heritage places to capture changing social values is challenging, particularly when many places remain to be documented, assessed and protected. Furthermore, the traditional method of identifying social value tends to be selective, often highlighting the history of ethnic or social groups associated with the material remnants designated as 'heritage'. This selective interpretation of heritage fails to encompass the vast array of tangible and intangible cultural attributes associated with different ethnicities and socioeconomic classes (Ashworth 2011). As such, the emotional attachments collected from individuals are ultimately distilled to resonate with broader communal identities on a regional or national scale (Pendlebury 2008, 2012). Selective social values are expressed as collective meanings and identities, with less emphasis placed on the complexity of individual relationships with places (Jones and Leech 2015). As tourism development allocates new uses and the composition of the community or the users of a heritage place constantly changes, the meanings attached to the place continue to gain depth and richness. However, the value assessment inevitably prioritises the preservation of material heritage, often focusing solely on the social dimension of thriving local communities, thus overlooking the evolving 'community' and the changing attachments people have developed to heritage places (Poulios 2014a, 2014b).

These limitations in assessing social values underscore the need to shift the focus towards the dynamic relationship between people and heritage places. Emotional attachments to historic places are very important to people, whereas expert-driven assessments often prioritise historical and aesthetic values over social values. Meanwhile, the intangible bond between people and places is in constant flux, as both heritage places and communities evolve, particularly in the context of overtourism. This calls for a shift in the conservation ethos to recognise the ever-changing nature of the intangible qualities of heritage and to acknowledge that heritage is fundamentally an emotional construct rather than a mere material existence (Smith 2006, Pendlebury 2008, Gibson and

Pendlebury 2009, Harrison 2010). In the following section, we revisit the concept of 'sense of place', which is a term commonly used to describe people's perceptions of a place. This revisitation is an attempt to capture the deepening and enriching connection between individuals and the places they cherish within the framework of conservation practices.

2.3 Revisiting the concept of 'sense of place': a call for a dynamic conception of 'place' and 'value'

In the original inception of the *Burra Charter* in the 1970s, the term 'sense of place' was seen as the primary concept for understanding the social value inherent in historic places, arising from the profound 'attachment of meaning to a specific locality' (Johnston 1992, 10).

The roots of 'sense of place', however, can be traced back to the 1960s, when scholars from various fields, such as environmental psychology, human geography, and urban planning, began to explore this abstract and elusive concept (Relph 1976, Tuan 1979, Punter 1991; Altman and Low 1992, Montgomery 1998). Some studies emphasise that sense of place is critical to the management of the historic environment because it represents the connections between people and places (Shamai 1991; Jorgensen and Stedman 2001). In particular, the humanistic geographer Edward Relph (1976, 4) interpreted 'place' as a complex composition that represents not only a spatial location but also a 'perceptual unity' that conveys individual experiences and functions as 'centres of meanings' among cultural groups. In essence, the sense of place serves as a conceptual bridge, harmonising subjective human perception with the objective attributes of a given place. It can be argued that the concept of sense of place essentially comprises two components—the physical characteristics of a place and the personal encounters associated with it. For the former, i.e., the *objective* attributes of a place, the local distinctiveness of the physical environment provides a visual reference point for individuals to cultivate familiarity and form personal bonds. Within urban design disciplines, for instance, Kevin Lynch (1960) emphasised the 'legibility' of urban landscapes, revealing how distinctive physical elements have shaped citizens' perceptions of urban form and their cognitive understanding of their living environment.

Conversely, sense of place also encompasses a *subjective* component related to personal experiences that form affective bonds to places. As emphasised by human geographers in the 1970s, individuals give meaning to the locales they inhabit primarily through lived experiences (Relph 1976, Tuan 1979). Over time, these personal experiences undergo reflective processes, eventually nurturing 'place attachment' (Johnston 1992). To some extent, 'place attachment' can be seen as a subset of 'sense of place'. Several studies have suggested that sense of place can be classified into different levels based on the intensity of the emotional attachment between individuals and places (Relph 1976, Shamai 1991; Hashemnezhad et al. 2013). For instance, adapting Relph's (1976) seven distinctive types of insideness and outsideness, Shamai (1991, 349–350) proposes the 'scale of sense of place', which consists of seven levels, from the highest to the lowest, as follows: 'sacrifice for a place, involvement in a place, identifying with the place goals, attachment to a place, belonging to a place, knowledge of being located in a place, not having any sense of place'. Hashemnezhad et al. (2013) subsequently condense this seven-level gradation into four distinct levels (Fig. 1). In both instances, 'attachment to a place', i.e., place attachment, represents an intermediate level of sense of place where people have positive emotional connections to a particular place (Altman and Low 1992; Hashemnezhad et al. 2013).

In summary, sense of place consists of the objective attributes of a place and the subjective experiences therein, which represent 'place (environment)' and 'value (experiences)', respectively. Both 'place' and 'value' should be seen as ever-changing entities, akin to the evolving nature of a 'city' and the shifting concept of 'identity'. More intriguingly, the intricate interplay between place and value constantly transforms the 'sense of place'. This dynamic perspective underscores the need for an approach to heritage management that reflects the evolving relationships between people and the places they cherish. In contrast to expertly defined 'social value', sense of place involves the perspectives of the people who are emotionally connected to a heritage place, aligning more closely with the fluid and dynamic notions of 'place' and 'community'. Particularly, capturing the sense of place of 'affected stakeholders' is the key to authentically

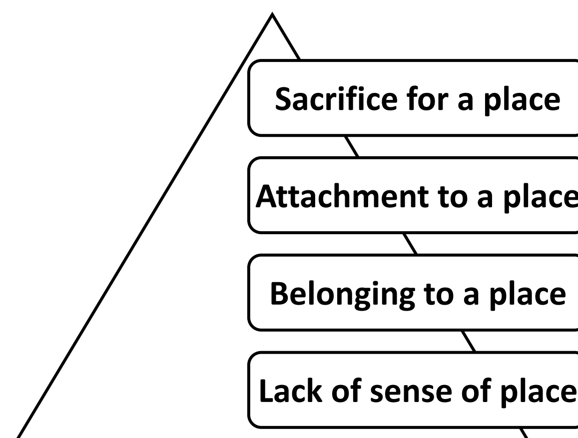

Fig. 1 Different scales of sense of place (Source: Hashemnezhad et al. 2013)

representing the spirit of a place. Nonetheless, another question arises—who are the rightful 'affected stakeholders'? This question will be addressed in the final section of this paper.

3 Capturing and incorporating sense of place in conservation practices

This section reviews the existing methodologies for sustaining people–place bonds and, in so doing, explores alternative approaches to addressing the social dimension of heritage and its conservation. As expounded upon in the proceeding section, the concepts of 'sense of place' and 'social value' both emphasise profound human relationships with the environment. Consequently, they are often used interchangeably, blurring the distinction between the originally captured 'sense of place' and the expertly sanitised 'social value' (Mason 2002). For clarity, this review adopts the definition of 'sense of place' as the individual or collective emotional attachment to a specific place, whereas 'social value' encapsulates the broader cultural significance of a historic place within society. In essence, capturing sense of place represents a crucial aspect of conservation practices, which is manifested in various forms of community involvement. A variety of methods are used by heritage professionals and urban planners to collect 'data' from local residents, such as questionnaires, focus groups, community workshops/charrettes, interviews, or oral history sessions, to uncover the personal experiences and historical memories associated with a place. The amassed raw data—representing the sense of place—are then synthesised, analysed and refined by heritage professionals to articulate the 'social value' of a place in their value assessment. This translation/processing of data provides the information needed to put forwards a succinct statement about the cultural significance of a place, providing a rationale for conservation decisions about its physical attributes, i.e., which parts of a place should be kept, and which parts can be altered or scrapped (English Heritage 2008, Worthing and Bond 2008).

3.1 How to capture one's sense of place?

The conventional methods for capturing sense of place—i.e., the ways in which conservationists and planners collect data from affected stakeholders and local communities—are akin to the research methods adopted in anthropology and ethnography. A range of quantitative and qualitative methods and techniques—surveys and interviews, writing historical narratives, and mapping—have been used to collect perceptual data. Indeed, anthropological and ethnographic methodologies are of interest to heritage fields (Mason 2002, Garcia et al. 2018). Surveys and interviews, which can either strategically focus on key stakeholders or, more broadly, target all the members of the whole community, are most commonly used. In Australia, for instance, an electronic survey was conducted nationwide to solicit suggestions and consider sense of place in identifying planned spaces, settlements and cities of potential national heritage significance (Freestone et al. 2008).

The documentation of historical narratives is a basic humanistic methodology and has been employed in conservation works with two specific approaches, namely, story elicitation and photo-elicitation (Barkley and Kruger 2013, Stewart et al. 2013). People's connections to places are revealed through the sharing of place-related stories and photographs or through memories triggered by revisiting photographs of the place. In practice, a research team from the SUIT project (Sustainable Development of Urban Historical Areas through an Active Integration within Towns) employed the photo-elicitation technique to measure the perceived quality of historic areas, which has also been acknowledged by the ICOMOS CIVVIH since 2006 as an exemplary methodology (Tweed et al. 2002, European Association of Historic Towns and Regions 2007). The survey featured photographs depicting alterations, varying from incongruous to subtle changes, made to the historic environment. By observing participants' reactions to these simulated interventions in the photos, researchers could discern how individuals valued a historic place (Tweed et al. 2002).

In addition, various distinctive types of mapping have been widely used in conservation, ranging from the descriptive recording of the physical condition of heritage places to the interpretative 'cultural mapping' advocated by the UNESCO Historic Urban Landscape (HUL) approach to illustrate the character and identity of a place (Bandarin and Van Oers 2014). As an alternative method of perceptual data collection, cultural mapping is a more comprehensive approach that visually documents heritage places through a combination of historical research and spatial analysis (Stewart 2010, Avrami 2019). Cultural mapping extends the technique of cognitive mapping, which visualises individuals' internalised perception of their living environment. Local communities and stakeholders, rather than professionals, carry out mapping exercises to achieve a thorough identification of community assets and an authentic representation of place attachment. The process involves the systematic documentation of cultural assets and practices within a specific geographical area. Aligning with UNESCO's endorsement of the HUL approach, the city of Ballarat in Australia pioneered

the use of cultural mapping methodology to capture sense of place (Dyke et al. 2013). The Ballarat initiative involved the collection of perceptual data through programmes such as *Ballarat Imagine* and *Peel Street Story,* using both photo- and story-elicitation approaches. The data collected were then mapped, and a digital mapping system was established to facilitate and enhance ongoing communication with local residents.

The sense of place collected through these anthropological methods represents the social dimension of places. However, the incorporation of these findings into conservation planning has varied. In value-based assessment, expert judgement inevitably takes precedence, albeit with community involvement. The captured sense of place serves as a basis for social value assessment, guiding conservationists in making informed decisions on how to conserve the physical structures of heritage (Mason 2002). In recent years, a growing body of literature has also advocated for active collaboration between experts and relevant communities to reach a consensus on how to conserve the intangible aspects of heritage (De la Torre and Mason 2002, Harrison 2011, Jones 2017). This call for collaboration comes from the fact that expert-driven approaches often fall short in acknowledging the fluid and iterative nature of social dimensions in conservation practices.

3.2 How to incorporate: from value-based to living heritage

Progressing towards public empowerment in conservation practices, the evolving strategy for integrating a sense of place into conservation planning underscores community-led initiatives with the 'living heritage' approach (Poulios 2010, 2014b, Wijesuriya 2015). In contrast to value-based assessment, where social dimensions are objectified and encapsulated as professionally defined 'social values', the living heritage approach redirects attention to the physically present community in the heritage place. To ensure the continuity of a place, its heritage is inextricably linked to a particular community, which is referred to as the 'core community', with a long-standing presence in the place. The core community maintains the original function of a place and sustains the enduring people–place association, while other communities that are partially involved in the existence of heritage are categorised as 'broader communities' (Poulios 2014a, 2014b). Recognised as an integral part of heritage within the living heritage approach, the core community is given a central position, relegating both the broader community and conservation professionals to secondary roles (Poulios 2014a, 2014b) (Fig. 2). In conservation practices, this approach embraces the dynamics of sense of place and actively empowers the core community in the decision-making process (Wijesuriya 2015). Nevertheless, it is crucial to note that the living heritage

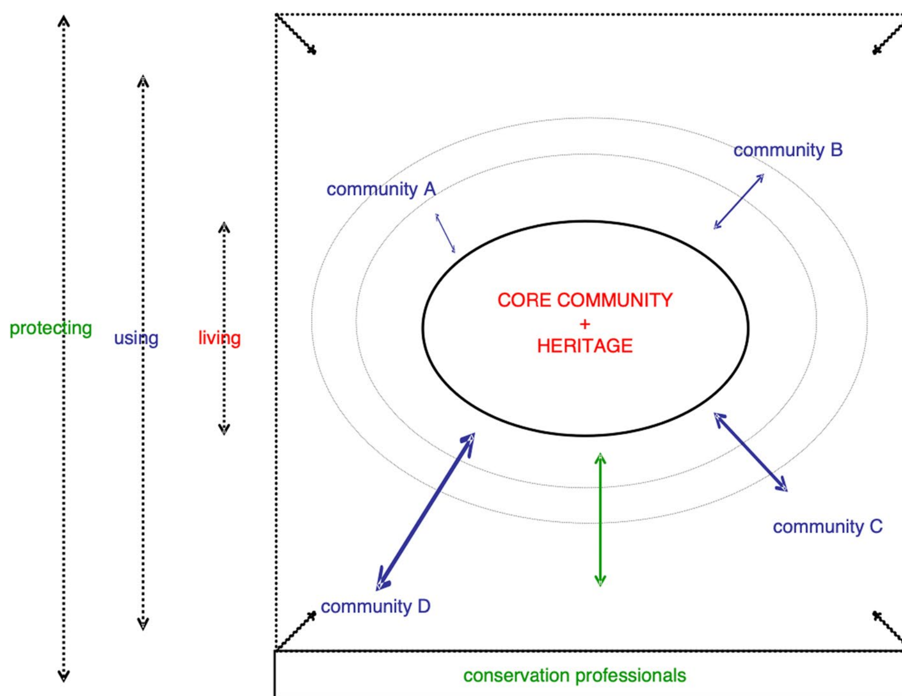

Fig. 2 The living heritage approach (Source: Poulios 2014a)

approach relies heavily on the physical presence of a core community and the preservation of the original function of the place. In situations where a core community has been displaced elsewhere or affected by overtourism, the effectiveness of the living heritage approach may be either compromised or rendered ineffective.

4 Towards a new paradigm: embracing a glocal community approach

As noted in the introduction, the burgeoning phenomenon of cultural tourism has led to instances where local communities have become increasingly detached from their heritage places due to excessive tourism. This issue is particularly pronounced in historic cities that are undergoing either gradual gentrification or the significant displacement of long-standing residents. In cases where established communities are either forced or choose to leave their long-cherished homes, the conventional notion of 'continuity' is rendered ineffective.

Traditionally, the concept of 'continuity' has been premised on the presence of a stable, enduring, and cohesive local community. It emphasises the tie between a place and a geographically defined 'local' community. While this perspective is valid in numerous incidences, it may encounter challenges and exceptions in scenarios involving overtourism or resident displacement. The social dimension of a place is continually shaped by a succession of communities, each of which interacts with the heritage place (Madgin and Lesh 2021). As both 'community' and 'place' are changing entities, addressing the continuity of heritage should not merely focus on the core community but extend to the broader community. For instance, Gamini Wijesuriya (2000) illustrated the case of the Temple of the Tooth Relic, a World Heritage Site in Sri Lanka, where the restoration work involved voluntary participation from Buddhists across the country and beyond. Given its symbolic importance of religion, the restored temple represents the collective attachment that the Buddhist community has had in the past and continues to have today. This sense of place is anchored in a social group that shares emotional connections with the temple, extending beyond the core community living in the immediate vicinity to a broader community in Sri Lanka and beyond. To sustain the temple's original function for the core monastic community and maintain its national significance as a place of worship, the restoration effort engaged not only the local community who resided there but also the broader Buddhist community (Wijesuriya 2000).

4.1 Defining 'glocal community'

The concept of a glocal community appears to be a potential alternative to the traditional concept of a place-based community. In contrast to the term 'museumification', the concept of 'continuity' emphasises sustaining the original function of a place and its core community, thereby connecting life between the past and present (Wijesuriya 2015). However, overtourism and gentrification often accelerate a decline in the local population. This calls for a redefinition of heritage stakeholders to focus on an interest-based community that transcends the confines of territorial and geographical boundaries. Building on sociologist Roland Robertson's notion of 'glocalisation' from the 1990s, the term 'glocal community' encapsulates a fusion of both 'global' and 'local' aspects, highlighting the interplay between global and local dynamics (Robertson 1994).

The concept of a 'glocal community' emphasises the dynamic nature of 'place', 'community', and 'sense of place'. This fluidity is particularly evident in numerous historic neighbourhoods, towns and cities that have become tourist destinations. A heritage site undergoes physical changes when it is gradually transformed into a tourist attraction or a gentrified residential area. At the same time, its community undergoes demographic changes, as tourists, new residents and different user groups move into the area while the original inhabitants move out or are displaced. Therefore, any collected data on sense of place only reflect the place attachment of the 'present' community at a specific moment in time. These shifting parameters cast doubt on the extent to which place-based perception data can authentically represent the sense of place associated with a heritage place (Madgin and Lesh 2021). Building upon this, people–place connections should encompass not only the ties of the indigenous or long-established community to a place but also the expanded attachments, evolving expressions, and site-specific activities occurring at the place over time.

A more rounded approach, therefore, is to consider the affected 'community' within heritage conservation and management as a 'community of interest', as defined by Grofman (1985). This perspective recognises groups of individuals who share values related to a heritage place as legitimate stakeholders, irrespective of their physical proximity to the place (Fig. 3). More importantly, for the displaced and any formerly rooted communities, their historical ties to the heritage place from which they were relocated can be sustained, as they continue to be part of this glocal community (Swyngedouw 2004, Roudometof 2016, Scardigno et al. 2022). This concept offers an alternative approach to address the challenge of continuity by acknowledging the evolving connections, shared values, and interactions between global and local communities (Horelli 2013, Spyros 2019).

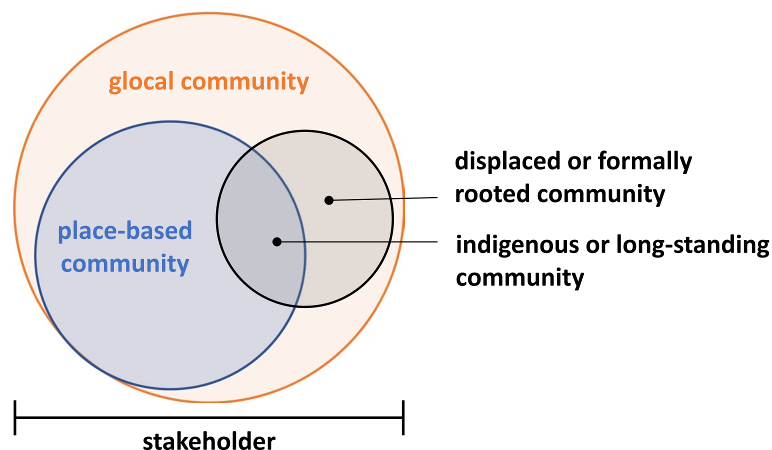

Fig. 3 The glocal community, i.e., an inclusive concept embracing both the place-based local community and the displaced or formally rooted community (Source: the authors)

4.2 Glocal community approach in practice

Characterised by the idea of sustaining historical ties while forging new ties, the glocal community approach empowers individuals and uses digital technologies to capture the sense of place of a heritage place. The advancement of digital systems, such as online forums and social media, facilitates the exchange of information and ideas without the constraints of geographical boundaries and time zones. UNESCO's Recommendation on the Historic Urban Landscape advocates for 'the use of information and community technology to document, understand and present the complex layering of urban area …… to reach out to youth and all under-represented groups' (Article 27, UNESCO 2011, 8). Heritage professionals have also increasingly leveraged the power of social media, employing datasets gathered from these platforms to understand daily life practices and conduct real-time analytics (Giaccardi 2012, Kim and Wang 2018, Bonacchi and Krzyzanska 2019; Ginzarly et al. 2019, Gregory and Chambers 2021).

Leveraging social media platforms, the glocal community approach fosters wider participation beyond the place-based community and worldwide (Giaccardi and Palen 2008; Hosio et al. 2010). It constantly stages a scene for heritage-making and brings together past lived experiences, memories, and personal thoughts about a place. Social media enables people–place connections to be preserved in cyberspace. The emotional responses documented on social media not only evoke nostalgia for the irreversible loss of historic landscapes but also enable interactions between stakeholders to share their memories and attachments to heritage places (Gregory and Chambers 2021). Admittedly, social media platforms have limitations in facilitating in-depth engagement and may pose accessibility challenges to those who are not tech-savvy. However, when used in tandem with traditional anthropological methods of data collection, digital technologies can significantly broaden our understanding of sense of place.

Capturing and documenting place narratives is a fundamental yet vital task when collecting perception data from stakeholders. Narratives in social media help individuals to (re)connect with a heritage place, reinforcing personal or community identity and strengthening place attachment. These narratives, whether oral or textual, legitimise personal experiences and foster a sense of belonging to a heritage place (Giaccardi and Palen 2008). Collective narratives provide a means for the glocal community to share individual experiences and memories related to a place and subsequently encourage wider community engagement. These narratives become part of heritage-making projects, creating an accessible archive with a broader perspective on the meaning of heritage places.

Incorporating diverse memories into a collective heritage 'archive' in the digital era, the concept of a glocal community holds the potential to foster enduring emotional ties (Giaccardi and Palen 2008, Beel and Wallace 2020). By encapsulating the histories and life stories of successive communities, this archive reflects emotional responses or attachments to places across generations. Particularly for globally renowned historic monuments, memories and attachments retrieved from social media platforms and the Internet can be woven into collective narratives, externalising the sense of place to the global community (Beel and Wallace 2020). The speed and scale with which the fire at Notre Dame de Paris swept through social media feeds, with the whole world expressing its grief and dismay online in real time, is a powerful example of how a Catholic cathedral in France is shared by 'us'—a very large and truly glocal community (Heinich 2021).

Fostering community participation, which is a process facilitated by both experts and digital systems, is critical to rebuilding the connection between glocal communities and heritage places. In addition to narrative documentation, the potential of social media data for characterising the urban landscape, visualising the perceived environment, and measuring heritage significance has become an additional resource for place-based conservation and planning (Stefanidis et al. 2013). One of the earliest attempts to visualise people's perceptions of urban landscapes was the 'mental mapping' method proposed by Kevin Lynch (1960). Lynch translated perception data into drawings with five key elements: path, edge, district, node and landmark. Although his interpretation of perception is expert-oriented, the five-element framework helps simplify and effectively visualise sense of place. Different interpretations aggregated from glocal communities can potentially generate simple visualisations using artificial intelligence (AI) (Giaccardi and Palen 2008). AI-powered applications can streamline data collection processes and enable the analysis of large volumes of data (Bonacchi and Krzyzanska 2019). However, what 'gets counted' in data science is largely determined by algorithms, which potentially perpetuates injustice and societal bias (Brown et al. 2021, Bonacchi et al. 2023). Therefore, the glocal community approach should capture sense of place in diverse ways, encompassing oral narrative documentation, memory recording and perceptual visualisation, with an emphasis on reflexivity and transparency in the collection process. In practice, this approach can be curated by any members with a passion for conservation, with or without local knowledge or expertise in specific fields such as history or architecture, while experts provide technical support and assistance for the sustainable collection of perceptual data on digital platforms.

The glocal community approach represents a complementary alternative for conserving the social dimension of heritage, especially when faced with the challenges of overtourism and displacement. While the value-based assessment and the living heritage approach place more weight on the presence of a long-standing community, the glocal community approach emphasises enduring emotional connections that transcend geographical boundaries (Table 1). It addresses concerns about continuity amidst declining local populations and changing demographics. By focusing on common interests, the glocal community approach offers a rich source of social constructs that contribute to a more inclusive and diverse understanding of heritage places. In addition to facilitating real-time documentation of the values attached by community members rather than solely by heritage experts, the development of digital platforms provides new avenues for community engagement and garners glocal support for conservation initiatives.

In addition to the community-led management advocated by the living heritage approach, the glocal community approach emphasises participatory and dynamic documentation. This involves recording how individuals engage with heritage places, thus contributing insights to decision-making processes for place-based planning and heritage conservation. Furthermore, by facilitating a democratic and voluntary documentation process, the approach can restore the disrupted people–place bonds caused by excessive tourism and displacement. Participatory documentation provides a virtual platform for formally rooted communities to partake in the social construction of heritage by sharing their traditional knowledge, memories, and stories about the place with a much wider audience and community. This approach can also help decision-makers better understand the central role of existing communities in managing heritage places.

Table 1 Three different approaches to sustaining people–place bonds in conservation planning

Approach	Value-based assessment	Living heritage approach	Glocal community-based approach
Key stakeholder (WHO lead)	Local government/heritage authorities	Indigenous community (long-established community)	Glocal community (heritage professional in assistance)
Long-standing population %	High/medium	High	Low
Level of tourism	Medium/low	Low	High, or even overtourism
Source of sense of place	Place-based community	Place-based community	Interest-based community
How to capture sense of place	Surveys and interviews, writing historical narratives, and mapping	Community-led initiatives	Narrative documentation, memory recording, perception visualisation via digital platform
How to incorporate the captured sense of place into conservation planning	Expert-led assessment to inform decision-making		Participatory & dynamic documentation to inform decision-making

While advocating the glocal community approach as a new paradigm in heritage management, it is crucial to note the associated risks and complications. These include two primary concerns. First, there is the challenge of harnessing the influence of glocal communities for heritage management while mitigating the risk of exacerbating overtourism, which is a negative consequence often linked to the proliferation of social media and the Internet. The prominence of the glocal community as a key stakeholder may raise concerns about the potential eviction of established local communities for redevelopment or regeneration under the guise of online community involvement. Second, there is the inherent danger of relying on social media as a source of information. Social media platforms, influenced by algorithms that can perpetuate injustice and societal bias, are not universally used and may be subject to political censorship (Brown et al. 2021, Bonacchi et al. 2023). Although social media offers an accessible and widely used platform for interpreting heritage sites, it by no means represents an impartial and equitable evaluation of societal attachments to heritage places. Therefore, the extent to and means by which the sense of place captured from social media influences decisions on heritage conservation remain unanswered questions that cannot be definitively addressed.

Notre Dame de Paris stands as a compelling illustration of this complexity. The decision-making process surrounding the reconstruction of Notre Dame has been influenced by various factors, including expert recommendations, funding considerations, technical feasibility, and shifting public sentiments (Otero-Pailos 2020a, 2020b). The French government's initial proposal to replace the fire-damaged spire with a contemporary design, followed by subsequent design schemes shortlisted by international competition, sparked intense and divisive reactions (Pennoyer 2019). While the fire drew global attention to the cathedral's plight, emotional reactions to decisions regarding reconstruction—debating between a faithful replica of Viollet-le-Duc's 19th-century design and a 21st-century intervention proposed by French President Emmanuel Macron, aiming for a result 'even more beautiful than before'—evolved continuously across various mass media platforms over time (Poulot 2020, Heinich 2021). The decision regarding either the restoration or redesign of the spire may have been influenced by opinions expressed by social media users outside Paris and France, but social media was not the sole determinant. This example underscores the importance of considering multiple sources of input rather than relying solely on social media for decision validation.

Thus, the glocal community approach serves as a complement to value-based assessment and the living heritage approach rather than supplanting them. This new paradigm should be viewed as a complementary approach adopted in conjunction with the two existing paradigms to mitigate the potential pitfalls associated with algorithm bias and misinformation. We can view this transition in approaches as 'an incomplete paradigm shift', very similar to Gregory Ashworth's (2011) elaboration on the evolution of our approaches to dealing with remnants of the past, i.e., from preservation through conservation to heritage. In practice, the three approaches to incorporating sense of place into conservation planning and heritage management coexist in real-world contexts.

5 Conclusion

The gradual decline in the local population due to overtourism and the displacement of local residents in urban renewal projects not only cut off the physical ties between individuals and their cherished places but also erode the shared memories and local traditions that represent the social dimension of heritage. For decades, decisions on conserving the physical and social fabric of heritage have often been justified through expert-defined 'social value', which was distilled from the sense of place of a place-based community at a particular point in time. However, there is currently a growing shift towards recognising the dynamic and evolving nature inherent in the social dimension of heritage, prompting a revisit and reconsideration of the concept of 'sense of place'.

This paper examines existing methods for capturing and incorporating sense of place into conservation practices, including value-based assessment and the living heritage approach, and ultimately proposes a new paradigm: the glocal community approach. This new approach places emphasis on the emotional bonds and memories that individuals attach to places, diverging from the emphasis on the physical presence of long-standing and close-knit communities. Recognising the applicability of these different approaches in conservation planning, this paper argues that the glocal community approach broadens the perspective by re-establishing the connections of heritage places with a broader community beyond geographical constraints. The concept of a glocal community, centring upon a 'community of interest', aims to expand the conventional notion of 'continuity' premised on a static local community. The practicality and effectiveness of the proposed new method for capturing sense of place from glocal communities have yet to be verified and scrutinised in real-world practice. Conducting more in-depth investigations into how this transition might either contribute to or exacerbate overtourism would provide a more thorough understanding of the challenges and opportunities associated with the proposed approach and its potential and limitations for wider application in the future.

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