THE ADAPTIVE REUSE OF CASTLES IN TOURISM AND SETTLEMENT DEVELOPMENT – PRIMARY IMPACT ASSESSMENT OF SOMOGY COUNTY'S CASTLE HOTELS, HUNGARY

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1. Introduction

The castles and mansions I have studied are part of cultural tourism, heritage tourism. W. Eder describes cultural tourism as such: "In a value-oriented view, cultural tourism provides on-site realistic, comparable and consistent information on past and present events" [1].

Smith wrote about the elements he thought were the different parts of an activity-based list he had created for summarizing cultural tourism, such as: heritage sites, performing arts, visual arts, festivals and special events, religious sites, rural environments, indigenous communities and traditions, crafts, languages, gastronomy, industry and commerce, modern mass culture, special interests [2]. Such cultural heritage values include castles, which fall within the sector of heritage tourism. Heritage tourism is a heritage-based tourism, where heritage is the central element of the product but also the main motivation for tourists to visit sites [3].

Today, according to our concepts, a mansion is described as the residence of the former aristocracy, built in rural, parked surroundings, with a large-scale, complex layout, and is generally a unique, massive residential building [4]. These buildings play an important role in international tourism and within the European Union as well.

Tourism, and particularly heritage tourism, contributes considerably to the income of European countries. In 2018 tourism accounted for more than 10% of Hungary's GDP and the aim for 2030 is to reach 16% [5]. The growth of the tourism sector, the expansion of tourist accommodation, the exploited and unexploited potentials of built heritage all provide opportunities for rural areas and for the exploration of rural heritage. These opportunities are of great importance, especially since the Hungarian capital was the best European destination in 2019 [6]. With the emergence of over-tourism, which is threatening Budapest as well, we need to rely more on our rural assets in the countryside. The question is whether the results of investments, initiated by different rural tenders and subsidies (such as the Kisfaludy Tourism Development Programme [7] and Modern Villages Programme [8]), are going to be enough to attract tourists from the capital to the rural areas or not.

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The values of certain nations are gaining more and more attention both at a national and international level. When talking about the tourist value of a region, several regional categories and heritage types come to mind. My research focuses specifically on rural areas and their heritage values.

As the concept of rural areas can be defined in many different ways (for example Szabó [9] defined it as: Budapest - rural area, densely populated - sparsely populated areas, developed – underdeveloped areas), I would like to clarify that I use the classification based on the legal categories of settlements, thus, the basis of my research is the town-village dichotomy. Accordingly, we can assume that cities have rural areas [10], which does not only manifest in the territorial pattern of the division of labour, but also in the differences in living conditions and types of tourism. In the past 50 years, a large number of the rural population has moved to the cities – because of the benefits of urban lifestyle - while city dwellers crave the rural idyll, indicating that villages could be the perfect setting for recreation [11]. Simultaneously, as a result of the "colonization" of rural areas by city dwellers, the number of rural homes and the recreational land use of rural areas has increased [12]. These processes indicate that the image of tourism has become stronger in villages, which could contribute to a decrease in the differences between the quality of life of villages and cities. At the end of the last century, Swarbrooke [13] had already pointed out that the development of rural tourism was one of the priorities in Europe because, after the relapse of agriculture and as a result of urbanization, rural areas were in crisis, and his argument might still hold true today. As a result of their historically different land use, diverse settlement heritages developed (untouched natural environment, farm system, manors) thus rural areas have great tourist potential.

The research examines elements related to residential architectural built heritage, such as castles, chateaux, mansions, churches and other local structures with the principal focus being an analysis of castles and their related cultural tourism. This type of built heritage is usually located in rural areas with low levels of anthropogenic impact; the unspoilt natural environment consequently increases the attractiveness of this built heritage [14]. Due to its history, Hungary has an abundance of castles and mansions. The reason behind the building of these castles was to represent the splendour of the aristocracy. The most splendid, largest and illustrious castles were built during the Baroque and Renaissance eras and bear the different characteristics of the given era. These castles served as homes for noble families where luxury was part of their everyday life. Over time, during periods of war, this type of building fulfilled a more defensive function, thus more massive, closed and isolated fortified castles were built. Over the years, several transformations were carried out on the exterior and interior of castles in the style of the given era or owner. After the transformation of land policies, the maintenance of these buildings became more difficult, and the socialist era undoubtedly had the most negative effects (after the wars). In most cases, until the regime changed, these castles were used for completely different purposes or were totally neglected in the name of nationalization. The castles were taken away from their former owners, thus their maintenance should have been the responsibility of the state, but in many cases, the state failed to comply [15].

Nowadays, the task of managing cultural heritage is carried out by the Ministry responsible for the protection of cultural heritage, in accordance with laws on heritage protection. Since the change in regime, entering the European Union has brought about significant changes. Both the state and the European Union have made the

protection and utilization of these buildings a priority and they both provide significant financial resources for this cause [16]. The function of castles has changed over time, from being the houses of nobles, to offices for collectivization, to schools and museums, but the buildings themselves – irrespective of whether they are utilized or not – belong to Hungary's built heritage. This type of heritage is characterized by a high level of localization; castles are tied to their environment through unique elements, giving the region a unique character [17]. The heritage in a given settlement greatly contributes to its image, to the identity of the inhabitants and the local economy and it can interact with the region in many other ways. The heritage values of the past stand out in the present too, the value system changing according to the given economic circumstances [18]. Its value, therefore, as well as its protection and enhancement, have an accentuated importance at international level. "The main goal of cultural heritage management is to conserve a representative sample of our tangible and intangible heritage for future generations" [19]. The IESA programme - which was established in compliance with the directives of the UNESCO - formulate the concept of heritage management as follows: "Cultural heritage management is about striking a balance between developing the tourism industry, generating revenue while still conserving the physical integrity of sites, promoting and celebrating their educational, historic and cultural values" [20].

All in all, we can say that the studied heritage values can help local economies, strengthen localism and improve the image of settlements – even at a level of the integrated protection of values. The integrated protection of values is an approach that aims to utilize built heritage and devote attention to its physical, economic and cultural potentials [21]. Thus, castles are not only the subject of cultural heritage research, they also fall into the field of economic geography where castles are part of the market generating income – both directly and indirectly – for the owners, the settlements and the state as well [15].

2. Study objectives and methodology

This study is based on my earlier research, thus collecting the secondary data was not difficult. My former research data was then updated on the basis of the related literature, laws and tender opportunities. In this research methodology, primary sources have a greater importance, since the studied phenomena have unique characteristics, are located within different settlements and have different historical backgrounds. Therefore, the research is mostly based on soft factors and defined by the information collected during fieldwork. Fieldwork is essential to study the castle hotels of Somogy County. On these fieldtrips I had the opportunity to gather the information about the castles personally. I also interviewed the castle owners and operators, as well as the local mayors, either personally, on the phone or via e-mail. The interviews were semi-structured. Since each castle is unique, I made room for the individual opinions of these people. The interviews included questions about the operation, renovation and development of the castles as well as an assessment of the emotional and financial situation. It was also important to assess the role of the residents within the system, either as guests using the recreational opportunities, or as workers and as inhabitants with a local identity. In many cases, the data on the income, number of quests, taxes (tourism and business taxes) paid to the local government and wages were not available, as the Central Statistical Office of Hungary (KSH) does not publish information which would violate the rights of individuals. For example, if a settlement has several accommodation establishments, then the data of the individual accommodations cannot be traced, therefore the role of primary data, collected during fieldwork and interviews is important. The castle hotels of the studied area, Somogy county, were illustrated on a map and their basic information was recorded as well. The data are stored in Microsoft Excel tables, while the maps were created using ArcGIS 10.2.1 software.

3. Castle hotels in Hungary

Castles were the residences of nobles, built in rural areas with huge parks, to celebrate their grandeur and perpetuate their power [4]. Mansions are a smaller version of castles, and are not to be confused, since functionally, they have always been completely different. Castles play a major role in international tourism, and are not only attractive tourist destinations, they can also be the basis for the development of settlements as well [22]. The utilization of castles for tourism raises the question of heritage preservation because, since they are protected, their modernization and rebuilding can only be carried out under conditions strictly regulated by law. Furthermore, during their utilization the buildings, adjacent parks and the surrounding land can deteriorate, resulting in a decrease in value.

On the other hand, if they are not utilized, they might be demolished. The real question is, what exactly is heritage protection/preservation? Is it passing these historical values down to the future generations in their original state, weathered by age, or reconstructing and authentically rebuilding them, thus conserving the building, but changing its original personal character? This study does not aim to solve this eternal dilemma but would like to introduce examples of practical solutions/approaches.

For some, cultural heritage, castles included, should be utilized as resources [17], since they can be tools for enhancing the competitiveness of regions [23]. This supports the idea of Hornyák when he notes that heritage should be part of the market, it should be regarded as a market commodity from the past which aims to satisfy present needs [24]. The above-mentioned statements all point to the fact that using castles as hotels is reasonable, as both tourism and settlement development in rural areas can benefit, and the buildings are also preserved. However, it is important to note that "today's postmodern society is selective and therefore not all cultural or heritage resources are equally attractive" [25]; in Hungary, "due to the monumental nature of its castles, they are perfect for housing ethnographic museums and exhibitions"[26], which are popular among tourists. At present 70 castles operate as hotels in Hungary (Figure 1). Although, not all of them can be categorized as castle hotels because according to the Hungarian Hotel and Restaurant Association (HHRA) a castle hotel is a hotel that meets the requirements of a minimum three-star hotel. operates in a mansion or other castle-like building with a historical background, and has high-quality services. The problem lies in the categorization of castle hotels, there is no database on their classification, number of stars or their operation concerning heritage protection aspects. In many cases, the information that makes classification easier can be found on the websites of castle hotels, but because of the missing data, this research only analyses those castle hotels which are being operated in castles.

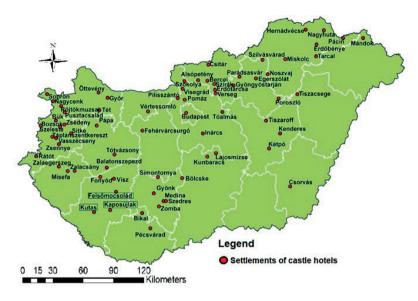


Figure 1. Castle hotels in Hungary (Source: author, based on [27] 2019)

3.1. Castle hotels in Somogy County

Figure 1 shows there are several castle hotels in the studied region but not all of them are part of this study. The castles located in Fonyód and Visz belong to the Bala-

ton Resort Area and are therefore excluded from the study. The area along Lake Balaton boosts both economy and tourism, establishing a completely different structure, thus, the settlements and castles located within this area are not taken into consideration. There is another castle hotel in Somogygeszti, but it is temporarily closed because of changes in ownership and renovation work, therefore it is not represented in Figure 1 either. As a result, the study examines three castles which are operating at present and are located in Somogy county. Primary data collection was also carried out at these locations: Felsőmocsolád. Kaposújlak and Kutas (Figure 2).



Figure 2. Castle hotels in Somogy county (Source: author, 2019).

3.1.1. Kutas and the Hertelendy Castle Hotel

The Hertelendy Castle is unique in the county, because of its geographical location and its characteristics. As to public administration, the castle belongs to Kutas, a linear settlement with 1438 inhabitants [28]. The settlement found in Belső-Somogy (Inner Somogy) has a highly agricultural profile and the rate of unemployment was 9.88% in March 2019 [29]. The technical infrastructure is adequate, different services are also available (shop, post office, office/magistery) and local agriculture is also noteworthy. Its uniqueness lies in its distance from Kutas itself as the castle lies 6 kilometres (as the crow flies) away from the settlement and is not an integral part of it. This gives the structure and its adjoining facilities a sense of isolation and peacefulness [15].



Figure 3. The Hertelendy Castle Hotel in Kutas. (Source: [31]).

The building of the castle was started in 1920 by Andor Hertelendy in a Classicist style. During the Great Depression in 1929 the family suffered great losses, so they were unable to finish the building. Therefore, the southern wing was finished by the new owner, who used contemporary plans and the building was completed in 2006. The castle remained undamaged after World War II, consequently, according to István Gyenesei, the Hertelendy family was able to live there until nationalization [30]. Unfortunately, the family lost all their belongings during nationalization, but it also meant they were able to get rid of their huge debt. After nationalization the State Farm of Kutas took over the castle, but since there was no electricity in this part of the settlement or paved roads leading to the castle, they were unable to find a new function for the castle in the 1950s. Unlike many other rural castles and mansions in Hungary at that time, it was not transformed into a co-operative farm centre, nursing home, school, li-

brary or mayor's office. In the 1970s a construction camp was established in Kozmapuszta. At that time a hostel was also built next to the Hertelendy castle in a "social realistic" style [30]. In 1990, the State Farm went bankrupt, and the building stood empty until 1997, when László Hagyánek bought it. It was he who initiated the preservation works on the building, which saved the castle. However, he was only able to run the building until 2002. Until then it had been operating as a three-star hunting lodge with seven rooms and only four bathrooms. Then in 2004, thanks to a Swiss investor, large construction works started and after about two years, when the 2.5 billion investment was completed, the Hertelendy Castle opened its gates (Figure 3) and became the first five-star hotel in the region [30].

3.1.2. Felsőmocsolád and the Bánó Castle Hotel

Felsőmocsolád is also an agricultural settlement with only 395 inhabitants in the district of Kaposvár (www.nepesseg.com). The Bánó castle and the adjacent estate is located in the centre of the village. The unemployment rate is 5.09%, which is above the country's average (3.6) [29]. The technological infrastructure is adequate and different services are also available. The road leading to the castle was constructed by the present owners and the uniqueness of the castle's location is that it is an integral part of the settlement. The castle was built between 1810 and 1814 at the request of Mihály Kacskovics and the 57 m long, classicist styled masterpiece (Figure 4.) was finished after World War I by Iván Bánó. Unfortunately, just like many other historical buildings, this castle could not avoid nationalization and it became state property. The castle then functioned as a school, welfare house and as a nursing home until 1997, when Sándor Bánó – descendant of the original owners – started renovating the building. The castle, which lies in a beautiful natural environment in Somoov, is still in the ownership of the Bánó family, who manage a three-star castle hotel in the building and are trying to make it even more attractive by expanding and innovating the structure [32].



Figure 4. The Bánó Estate in Felsőmocsolád. (Source: [33]).

3.1.3. Kaposújlak and the Szarkavár

Kaposújlak is also located in the district of Kaposvár, near the county seat, and has 736 inhabitants [28]. It is also an agricultural settlement, but the rate of unemployment (2.61%) remains under the country's average (www.nfsz.hu). The former Somssich castle can be found in the Szarkavár demesne land, about two kilometres away from the settlement. The castle, named after the demesne land Szarkavár, is situated in a green zone together with the former park and farm buildings. Pongrácz Somssich started the construction of the castle in 1831 in a classicist style, while his descendant, József expanded it with eclectic elements in 1885. The estate belonged to the family until 1944, when it was – as many other Hungarian castles – nationalized. Its function was completely different from its original one as a detention camp was established there. This castle was also bought in 1977 during privatization. The buyer was a Ltd company but is only the owner. From 2012 the operators are a Hungarian and a foreign private person. It is a three-star castle hotel (Figure 5) situated in a relaxing environment [34].



Figure 5. The Szarkavár Castle Hotel in Kaposújlak. (Source: [35]).

4. Relationship between the castle hotels and settlements

It can clearly be seen from the previous analysis that all three castle hotels are located in disadvantaged areas. The settlements are agricultural and are found in the inner periphery of the second most disadvantaged Euroregion (South-Transdanubia) of Hungary. However, the situation is even more complex; for example, the great physical distance is usually a disadvantage when it comes to commuting, but in the case of

a castle hotel it can be an advantage. Table 1 summarizes the most important similarities and differences between the castles and is based on the information collected during the interviews.

Table 1. Main characteristics of the castles.

Parameters/ Castle	Hertelendy Castle Hotel	Bánó Estate	Szarka-vár Castle Hotel
Year of opening	2007	2007	2012
Number of stars	5	3	3
Number of spaces	40	50	37
Average price (person/night)	50,000 HUF	20,000 HUF	13,000 HUF
Paid taxes in 2018	2 million HUF	900,00 HUF	n.d.

Source: On the basis of data given by the operators, author, 2019. (Paid taxes: tourism tax and business tax; HUF = Hungarian Forint; n.d.: no data)

4.1. Advantages

The most important elements in Table 1 are the tourism and business taxes, since they are paid by the managers to the settlements, so they appear as revenue on the income statement of the municipality. (The Castle Hotel of Kaposújlak does not publish this information and the budget of the municipality is not available either.) Tourism tax is a type of local tax which generates revenue for municipalities. This amount can be a maximum of 4% of a guest's fee for one night, though the local government has the opportunity not to collect these taxes [36]. In Kutas, for example, the local government collects 3 percent of the castle's net income.

When analysing the advantages of castles from an economic point of view, it becomes clear that not only taxes matter, but also the fact that these castles create jobs. Creating jobs not only strengthens the ability of settlements to maintain their inhabitants (population retention capacity of settlements), but the wages of the locals remain in the settlements, thus generating another positive economic effect.

When further analysing the relationship between the castle hotels and settlements, we cannot ignore its positive effects on local people's sense of identity. Local people are tied to these heritage buildings, as in many cases they went to school there or the buildings were integral parts of their lives in other ways. Local people accept the changes in ownership and the reconstructions in the buildings' life; they are proud of these buildings and consider them important. Value preservation, which is closely related to this, is a process enabled by the owners of the castles, but its results are felt by the locals because, besides saving a heritage building from destruction, the managers of the buildings emphasize the protection of the natural environment and the necessity of taking care of it.

Furthermore, the owners and operators of castle hotels actively practise corporate social responsibility because they provide free entrance to the area, with the castle in Kutas helping local people with donations as well. Besides economic advantages (taxes, wages, infrastructural developments), positive moral and aesthetic effects also ap-

pear in the way castles can contribute to the development of rural areas. Hotel keepers are in active co-operation with local residents and leaders, so the settlements can also benefit from their positive effects. As mentioned earlier, all castles have their own history, method of adaptive reuse and success, depending on their geographical endowments, but they all have their advantages and disadvantages as well.

4.2. Disadvantages

The distance between the building and the settlement (for example in the case of Kutas) could be regarded as a disadvantage, because guests would probably not use the local services and the accessibility of the castle could also be difficult. Apart from the physical distance, there may be a mental distance on the part of the local people, as many of them have nothing to do with the hotels, they are not actively interested in them, it is foreign people who stay there and foreign people who are the owners. If the owner or the operator is a foreigner (Kutas, partly Felsőmocsolád) locals tend to act in an aloof manner. The studied castles are typically open seasonally, which appears to be a disadvantage in terms of income, and it is a disadvantage for the employees, too. Seasonal operation is reasonable, as businesses usually break even, and they generally have to carry out new developments (international sports events and wellness centres) for the rest of the year. This is a good investment because returning clientele can be motivated this way. The guests of the castle hotels - especially in the case of Hertelendy Castle Hotel - are usually wealthy people who provoke negative reactions from local people and even from the local leadership. However, purchasing and renovating a castle is quite costly and if they are not multifaceted (such as the orchard in Kutas, an agricultural asset in Felsőmocsolád), their operation is not profitable. Buying these castles was more of an emotional decision on the side of the owners rather than an economic one. The future of castle hotels is uncertain but as long as they operate, they actively shape the rural area and its inhabitants.

4.3. Castle hotels as solutions to the problems of rural areas?

All the studied castles are found in rural areas where the typical issues of the Hungarian countryside are also present; these in turn have negative repercussions for the nearby villages (Figure 6.). The most striking problems are population decline and the aging population in rural areas, which affect not only Somogy county, but the nation as a whole. The reasons behind demographic erosion are sub-replacement fertility and emigration, both of which are becoming more and more intense. Most of the already disadvantaged villages, and other small villages, and hamlets which are difficult to reach and are situated within the inner periphery, are the first to lose their population. Both human and technological infrastructures are, moreover, poor in these settlements (public services, lack of mobility opportunities, lack of supply, unemployment). All these factors lead to the marginalization of local society and often to segregation based on wealth or ethnicity. As a result of these processes, these peripheral villages are, at times, segregated from the settlements [37]. The question is, will these settlements be able to survive or not?

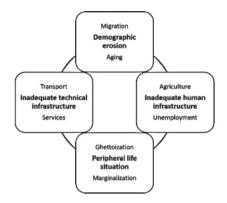


Figure 6. Problems in rural areas. (Source: author, based on [38] and [39], 2019).

If the potentials hidden in the natural environment and the cultural heritage of the countryside in Somogy were utilized, then not only the Balaton region and its festivals, but the idyll of the countryside, the natural environment and the castle hotels themselves would attract tourists and become prominent features of the area. The aim of tourism is to help these new areas catch up and transform their potential attractions, which when complemented with appropriate services and programmes, can become tourist products [40]. "In today's world, rural tourism as a strategy for rural development is widely used and many thinkers and planners pay special attention to it, because they believe that developing rural tourism is a good strategy to drive rural development, helping to face challenges and solve problems" [41]. Rural tourism is more diverse than the present study can show. Active recreation, hiking, traditions and gastronomy, which includes not only local food but also the culture and traditions of the area, are also an integral part of rural tourism. [42].

The utilization of castles in tourism are a possible solution to the problems that have been mentioned. They can create jobs, revenue and donations and improve the economy of rural settlements by decreasing the level of unemployment and the rate of emigration. They can moreover contribute to the amelioration of technological infrastructures by creating the necessary roads, waste disposal systems and even facilitate internet accessibility. The lack of education and low income, together with the agricultural profile, have a negative effect on these regions so that the castles can only help indirectly, and in part provide a solution. It can be clearly seen from these aspects, how the positive externalities generated by the operation of a castle can appear locally.

5. Discussion

The relationship between the reuse of castles and the development of rural areas clearly shows the potentials existing in the value protection of castles and settlements. Reusing castles for tourist purposes is a logical way to give these buildings a new function, as well as a way of preserving them. In my opinion this is one of the best ways to operate these castles in a nearly identical way to their original function. Special attention is paid to value protection during improvements and maintenance work, so the castle structure is properly preserved. As a result of tourism, the settlements obtain

income which can strengthen the local economy and can contribute to improving the quality of life. Nevertheless, integrated value protection could also be a solution to save the castles from total destruction. As to the future of a large number of non-utilized castles, there is unfortunately no possibility of renovating them all with state funds.

The present study has presented the castle hotels operating in Somogy county and their relationship with the local government and local people. After considering the pros and cons, we can conclude that these castles have some economic advantages, so it is worth reusing them. Cooperation between the municipalities, the inhabitants and the owners could be beneficial as well, provided investments are made for the right purposes. As for the question of heritage protection, in my opinion, reusing castles for tourist purposes – especially as hotels – contribute to their preservation as cultural heritage. In addition to protecting heritage, tourism and rural development, two interdisciplinary fields of geography, can coexist. In this study, tourism proves to be a potential instrument for developing rural areas through which the economy of the settlements, the identity of the local people and their quality of life can improve.

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Biographical Notes

Judit Péterfi is a third-year PhD-student at the University of Pécs, Hungary. As a student in the Department of Tourism, she also attends university as a teacher. Her research area is the utilization of castles and their effects on settlements. She has published many studies on the utilization of cultural heritage and she is writing her dissertation on this topic. As a member of the Doctoral School of Earth Sciences, she is committed to sharing her scientific results.

Summary

In Europe and in Hungary, there are a large number of built heritage assets. Nowadays castles can be reused as schools, common lodging houses, hospitals or residential buildings. The optimal way to reuse them is as museums, hotels and event venues for tourist purposes. The current study aims to present and evaluate the adaptive reuse of castles as hotels and assess the interest of local residents, leaders and castle-owners. The research focuses on the advantages and disadvantages of castle hotels in the life of the settlements. The case studies were conducted in Somogy County, where several castle hotels are located. Interviews and surveys are essential research methods. The research emphasizes the need for co-operation, which is indispensable for reusing the castles as hotels, to satisfy all stakeholders.

Riassunto

In Europa e in Ungheria, ci sono un gran numero di beni architettonici. Oggigiorno i castelli possono essere riutilizzati come scuole, alloggi comuni, ospedali o edifici residenziali. Il modo ottimale per riutilizzarli è come musei, hotel e luoghi di eventi turistici. L'attuale studio mira a presentare e valutare il riutilizzo dei castelli come hotel e valutare l'interesse dei residenti, dei gestori e dei proprietari di castelli. La ricerca si concentra sui vantaggi e gli svantaggi dei castelli trasformati hotel per la popolazione. I casi di studio sono stati condotti nella contea di Somogy, dove si trovano diversi hotel castello. Le interviste e le indagini sono essenziali metodi di ricerca. I risultati della ricerca sottolineano la necessità di collaborazione, indispensabile per riutilizzare i castelli come hotel e per soddisfare tutte le parti interessate.