

Main theses of the PhD dissertation

Doctoral School of Earth Sciences

**Analysis of the problems of castle utilisation in Hungary, with
special regard to the South Transdanubian Tourism Region**

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1. Introduction

There are hundreds of castles in Hungary, but many of them are completely unused or underutilised. This is why studies on the geography of tourism, which deal with the issue of castle utilisation, are extremely important. The relevance of this research is also reinforced by the increasing value of heritage tourism and the negative situation of rural spaces, among other factors. In my dissertation, I investigate the problems of castle utilisation in Hungary by considering the castles in the South Transdanubian Tourism Region from the analytical point of view of tourism and urban development.

One of the most important tasks I have been working on since 2014 is the creation of a database of castles in the study area. In this thesis, I will focus on the castles that are operating as hotels, as this is the closest to their original function. All in all, the thesis is a complex study where castles are not only heritage but also resources and not only for tourism but also for urban development.

2. Aims of the study

The main aim of this thesis is to highlight the achievements and potentials of the castles' valorisation process, so I have formulated the following objectives:

- The conceptual positioning of castles at the intersection of tourism and urban development
- Assessing buildings as a resource and protected heritage
- Typification of the castle utilisation
- Tourism attraction development opportunities for underused castles
- Analysis of the physical and human geographical features of the region from the point of view of tourism
- Creation and analysis of the castle register of the South Transdanubian Tourism Region
- Analysis of castle hotels in the study area through case studies

To achieve these objectives, I have formulated more specific research questions, which partly overlap with and partly complement the objectives of the dissertation:

Q1: How compatible is the utilisation of castles with the principles of heritage protection?

Q2: Is there a demonstrable link between the quality of life of the inhabitants and the socio-economic changes generated by the utilisation of castles?

Q3: What are the complex effects of the utilisation of castles for tourism in a given area?

Q4: To what extent are the principles of sustainability implemented in the operation of a castle hotel?

Q5: How does the utilisation of castles, especially for tourism, affect the sense of identity of the inhabitants and the image of the municipality?

3. Research methods

Secondary sources

Among the secondary sources, the most important element is the appropriate quantity and quality of *domestic and foreign literature* on tourism, urban development, and castles. The legal context cannot be ignored in the analysis of the utilisation of castles, so the analysis of the relevant *laws and tenders* is also of great importance among the secondary sources. Among other things, the Hungarian Central Statistical Office provides data on the number of overnight stays and guests, the average length of stay, and the population of the municipalities between 2015 and 2020. The results of the Eurobarometer Cultural Attitudes Survey 2017 are also important secondary *statistical data* for this thesis, which I analyse using *mathematical and statistical methods*. In addition to the descriptive, raw data, however, we must not forget the broad perspectives that can only be provided by *conferences*. Innovative secondary data processing will also be used in the dissertation, with the *analysis of media content* focusing mainly on underutilised buildings.

Primary methods

Primary sources form the bulk of the basis of this dissertation, of which *questionnaire surveys* are one of the most important primary methods:

- Conducting a questionnaire survey in 2019 among the frequent travelers of a travel agency (GEOTOUR Travel Club) to find out their travel habits (164 respondents);
- In 2018, a guest survey (416 respondents) was carried out in the framework of the project EFOP-3.6.2.-16-2017-00017;
- Public attitudes survey carried out in Kutas in summer 2018 (low response rate, only 12 out of 150 questionnaires were fully completed).

The semi-structured interviews I conducted (Table 1) form another large set of primary sources in the dissertation:

Table 1. The subjects of interviews

Name	Title	Date	Location/Way
István Gyenesei	Hertelendy Castle – general manager	2018. 02. 07.	Kutas, personal
Szabolcs Útő	Mayor of Kutas	2018. 02. 05.	electronic
Virginia Mocsai and Lajos Mocsai	Bánó Estate – owners	2019. 02. 01.	Felsőmocsolád, personal
Tamás Mocsai	Mayor of Felsőmocsolád	2019. 02. 02.	electronic
Judit Németh	Szarkavár – castle hotel operator	2019. 02. 05.	electronic
László Kollár	Puchner Castle – owner	2019. 11. 08.	Bikal, personal
Edit Belasics	Szent András Castle	2019. 11. 29.	Sümeg – conference presentation

The basis of the research carried out in this dissertation is the *castle register of the South Transdanubian Tourism Region*, which I had created. After collecting the data, I used the ArcGIS 10.2 software to create the *map representations* found in the dissertation.

4. Summary of results

4.1. The role of domestic castles in the 21st century

The novelty of the *clarification of the concept of castles* is that, in addition to examining the aspects of tourism and urban development, I also analyse castles in the intersection of the two disciplines.

The role of castles in tourism is very diversified, as the castles in the region under study stand out among the heritage assets, attracting cultural and heritage tourism. Guests engaged in castle tourism visit the former manor houses because they are looking for unique products. However, this experience derives not only from the built heritage but also from the intangible and natural heritage closely linked to it.

Castles can also be a tool for tourism development integrated into urban (and in many cases rural) development through the right level of cooperation. The conservation and preservation of heritage sites is a priority in development policy guidelines, where they are included alongside their use in tourism as potential economic boosters.

The examined heritage assets are mostly located in rural spaces (former farmsteads) (only 14 of the 119 castles in the surveyed region are in cities), and thus offer a solution to rural problems (Figure 1).

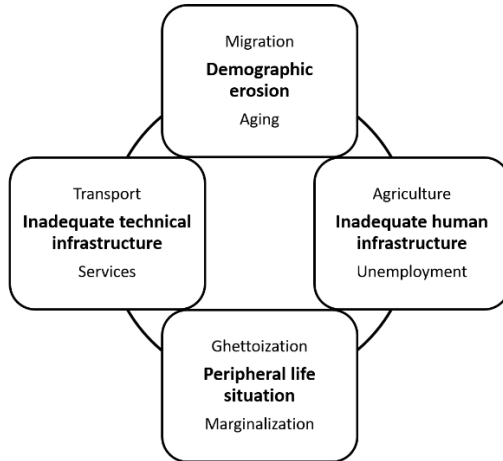


Figure 1. The structure of rural problems

Source: Based on Csátári, B. (2004) and Kovács, A. D. (2015), own editing 2019.

The natural environment and cultural heritage of the region under study also offer potential that could be exploited to help prevent the process of disintegration. The restructuring of rural space could be a solution to a number of problems, making the countryside a place for recreation, even based on its built heritage.

Castles and their associated areas can be a resource for many types of tourism products, but they can also enhance the competitiveness of a municipality or region. In addition, integrated value conservation may emerge, taking into account the physical, economic, and cultural potential of the available building stock when utilizing the existing built heritage. The creation of castles as a "rural asset" was not based on tourism, but today these heritage sites are part of the tourism resources. The *analysis of the physical and human geographical features of the South Transdanubian Tourism Region from a tourism perspective* also confirms that there is a great deal of potential in the area, which is important for tourism and the development of settlement

Castles are a heritage that the present generation considers worth passing on to the future. They are seen by the public as a key element of national, regional or local identity, and their visit, study or cultivation is of particular importance to certain social groups. Castles also have material, spiritual, and natural heritage values, which can only be commodified if sustainability is ensured. The preservation of the heritage of buildings is a constant challenge for their owners, and it is this struggle that provides the theoretical framework for what I have called the *perennial heritage conservation dilemma*. The basis of the dilemma is how to preserve the

ensures the long-term maintenance and financing of the building. Touristic utilisation of the castle also allows for a greater degree of historic preservation, as well as accessibility and visibility. Disadvantages include high capital requirements and slow payback periods

I have included residential and administrative buildings in the *other category*. Of all the private utilisations of castles, the residential function is the closest to their original purpose. Nowadays, a castle is too large for a family to live in, so parts of the building are made available for guests and rented out to the owners or opened as a museum.

4.3. Castle Register of the South Transdanubian Tourist Region

During the compilation of the database of castles in the South Transdanubian Tourism Region, buildings were grouped according to their use, ownership, and condition, but these factors change over time, so the inventory needs to be continuously revised.

- There are 119 castles in the region that meet the conceptual constraints of the category (Figure 3).
- 42% of the castles (50 buildings) are not in use, while 58% are utilised (Figure 4).
- Most of the mansions under social use are hospitals (Mosdós), children's homes (Bóly), social and retirement homes (Csertő), schools or kindergartens (Dunaszekcső).
- In the case of buildings used for tourism, there are several castles used as museums, exhibition spaces or event venues (Hosszúhetény), in addition, the provision of accommodation (Bikal) also appears to a greater extent.
- Buildings of other types of utilisation are mostly home to institutions and services of local importance, such as an office building (Bár), the mayor's office (Hidas), a community centre (Pusztakovácsi), a library (Bonyhád) or a police station (Babócsa).

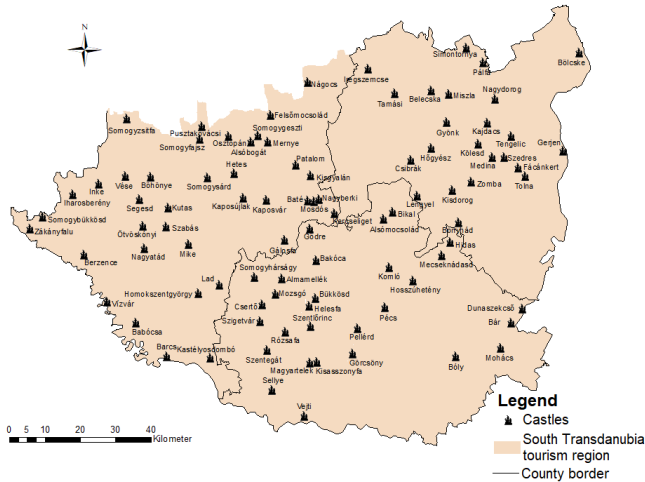


Figure 3. Location of the castles of the Southern Transdanubian Tourism Region

Source: self-editing based on data collection, 2020.

- The proportion of privately owned buildings in the region is 42.8%, the proportion of castles under other kinds of ownership is 36.9%, and there is no clear data on the ownership of some buildings (19.3%).
- The majority of the unused castles (65%) are privately owned. The lack of utilisation can be attributed to a number of problems, but the most common reasons are lack of capital, changing legislation and, weak heritage protection sanctions.

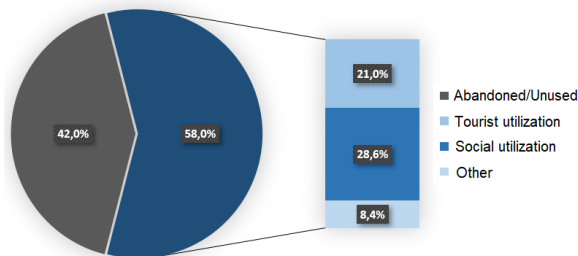


Figure 4. Categorisation of the castles of the Southern Transdanubian Tourism Region according to utilisation

Source: self-editing based on data collection, 2020.

- In the analysis of the condition of the castles, I created four main categories: renovated, under renovation, average, and decaying (Figure 5).

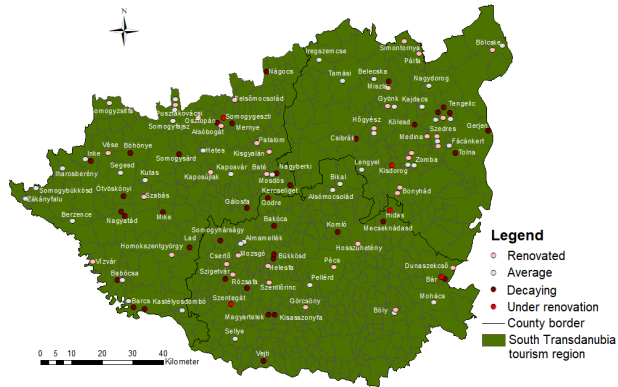


Figure 5. Distribution of castles in the Southern Transdanubian Tourism Region by condition

Source: self-editing based on data collection, 2020.

4.4. Analysis of the castle hotels in the study area

Among the types of touristic utilisation of castles, the most prominent are buildings that function as castle hotels. A complex impact assessment of castle hotels in the region is analysed through case studies. Although the accommodations in each monument have different ownership and different revenues in different settlements (Figure 6), there are many similarities between them.

Among the castle hotels, I have examined are the *Puchner Castle Hotel in Bikal*, the *Bánó Castle Hotel in Felsőmocsolád*, the *Hertelendy Castle in Kutas*, and the *Szent András Castle in Bölcske*. The research also included an analysis of the role of accommodations in quality of life change, social responsibility, protection of the natural and built environment, sustainability, and identity.

The owners of the castles attach great importance to *the protection of the natural and built environment*, both during reconstruction and operation. The positive economic externalities generated by hotels include wages and taxes, but also support for local producers and investment in infrastructure. These tangible benefits can also improve the *standard of living and quality*

of life of the people living in the settlement. The hotels surveyed are trying to strengthen their involvement in *social responsibility* by providing charity, discounts or free services. In the case of castles, *sustainability* must not only be an economic issue but also means the wise use, development, and protection of the natural, cultural, and built environment. In the analysis of *identity*, I found that the utilisation of the property as a positive change is recognised by the locals, but the condition of the property does not influence their attachment to the castles.

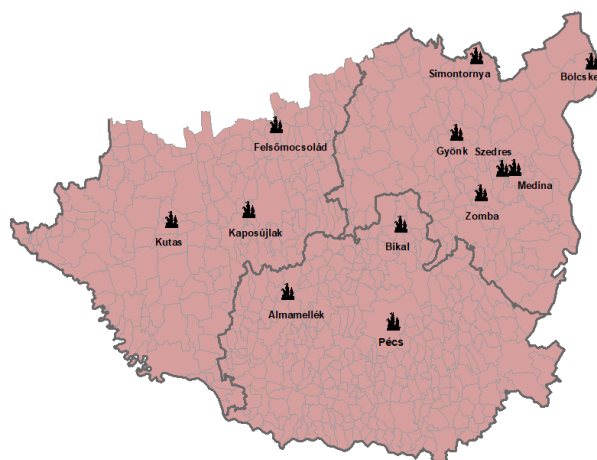


Figure 6. Castle hotels in the Southern Transdanubian Tourism Region
 Source: self-editing based on data collection, 2020.

- A SWOT analysis of the region's castle hotels reveals that strengths include saving and creating value, authenticity, cultural character, and a colourful range of recreational opportunities involving natural assets.
- Weaknesses include the application of heritage conservation principles, constrained spaces, high investment costs with a slow payback period, and high maintenance costs.
- It can be seen as an opportunity to boost the image of the area, offer wellness and spa services, provide a venue for events, link up with a thematic route and boost tourism in the area by increasing employment.
- Forced closure, underutilisation, price competition, loss-making operations and also lack of skilled labour can pose a threat.

4.5. Answering the research questions

Q1: The changes and depreciation from utilisation that come with conversion can negatively affect buildings, but without recovery, deterioration can be much more severe. The intersection between heritage protection and functionality is best reflected in the words of the owner of Szent András Castle in Bölske, who said that old values should be preserved while new values should be constantly incorporated.

Q2: In the case of castles used for profit, the economic contributions can improve the quality of life of the inhabitants of the municipality, but the buildings as environmental assets in their own right also improve the quality of life. The positive change can also be seen through the case studies, with practical examples (improving infrastructure, creating jobs, enhancing image).

Q3: I also looked at the natural, social and economic changes generated by castles. In general, the impact assessment shows that the touristic utilisation of castles has a positive impact on the environment of a municipality. In particular, castle hotels can contribute to improving the quality of life, social responsibility, and the protection of the built and natural environment.

Q4: It is in the interest of the castle owners that the building can be run economically, so economic viability is always a priority. Sustainability must also be applied to heritage assets, as there is no other way of ensuring that the values of the past are passed on to future generations. The use of renewable energy sources is a good example of the pursuit of environmental sustainability.

Q5: Tourism and urban development cannot be without marketing opportunities such as improving the appearance of the settlement, strengthening the image and the hospitality of the locals. I have found that a castle (whatever its condition) can have a positive impact on the image of a municipality, as well as on its sense of identity, and can even have a positive impact on the wider geographical area.

One of the potential uses of this thesis is the *castle register* of the South Transdanubian Tourism Region. The detailed analysis of the case studies and the *presentation of the process of developing the buildings into attractions* could serve as an example for the non-utilised castles. In *designing the potential thematic route*, I have also associated potential with event sites and ruin castles. The further direction of the research is the creation of a national inventory of castles by broadening the analytical aspects, and I also include the study of the impact of the coronavirus pandemic on castle tourism among my future research goals.

List of publications in this field:

1. **Péterfi J.** (2020): The Adaptive Reuse of Castles in Tourism and Settlement Development – Primary Impact Assessment of Somogy County’s Castle Hotels, Hungary. CONSERVATION SCIENCE IN CULTURAL HERITAGE. In progress. (Q3)
2. **Péterfi J.** (2020): Kastélyok idegenforgalmi szerepben a Dél-Dunántúli Turisztikai Régióban. In: Aubert A. (szerk.): *Esettanulmányok a Dél-Dunántúli Turisztikai Régióból*. PTE TTK FFI Turizmus Tanszék, Pécs. pp. 156-167.
3. **Péterfi J.** – Gászné B. B. (2020): Vendégkör felmérés a várak és kastélyok szerepéről a Dél-Dunántúli Turisztikai Régióban. In: Wirth G. – Köbli Á. (szerk.): *Huncastle II*. Edutus Egyetem, Budapest. pp. 113-122.
4. **Péterfi J.** (2019): A co-operative settlement for the utilization of the Hertelendy Castle. TURISZTIKAI ÉS VIDÉKFEJLESZTÉSI TANULMÁNYOK. 4. évfolyam Különszám 1-2. pp. 75-84.
5. Sümeghy D. – **Péterfi J.** (2019): Menekültek kastélyokban. Egy speciális kastélyhasznosítási forma politikai és műemlékvédelmi hatásai. *MEDITERRÁN ÉS BALKÁN FÓRUM* 13/3. pp. 39-55.
6. **Péterfi J.** – Masinka K. (2019): A vidék problémájának tüneti kezelése – kastélyhasznosítás a településfejlesztés jegyében. In: Wirth G. – Köbli Á. (szerk.): *Huncastle*. Edutus Egyetem, Budapest. pp. 89-99.
7. Gyuricza L. – **Péterfi J.** (2019): Kulturális és helyi értékek, mint motivációs tényezők a szenior utazók körében. Turizmus, fogyasztás, generációk. *II. Nemzetközi Turizmusmarketing Konferencia Tanulmánykötete*. PTE KTK. Pécs. pp. 57-64.

8. **Péterfi J.** – Sümeghy D. (2018): Cultural Heritage in the Central European Region - Mansion Utilization and Development in Hungary. EUROPEAN JOURNAL OF GEOGRAPHY 9. 3. pp. 6-22. (Q3)
9. **Péterfi J.** (2018): The Special Utilization of Castles in Tourism – Festivals in the Heritage Sites. *Journal of Tourism and Hospitality Management* 4. 4. pp. 20-33.
10. **Péterfi J.** (2018): A településfejlesztés és a kastélyturizmus kapcsolata a kutasi Hertelendy Kastélyszálló példáján. TELEPÜLÉSFÖLDRAJZI TANULMÁNYOK. 7/2. pp. 84-99.
11. **Péterfi J.** (2018): Szenárióelemzés egy somogyi romért - a ladi Hoyos-kastély. In: Alpek B. L. (szerk.): *Földrajz, diverzitás, csomópontok: Tanulmánykötet a 70 éves Dövényi Zoltán professzor tiszteletére.* Publikon Kiadó. pp. 203-216.
12. **Péterfi J.** (2018): Kulturális attitűdvizsgálat a Dél-Dunántúlon – a kastélyhasznosítás lokális hatásai. In: Fazekas I., Kiss E., Lázár I. (szerk.) *Földrajzi tanulmányok 2018.* Debrecen, Magyarország: MTA DAB Földtudományi Szakbizottság. pp. 337-339.
13. **Péterfi J.** (2018): Az örökségvédelmi pályázatok kastélyai, mint a kulturális turizmus alanyai és a településfejlesztés erőforrásai In: Reisinger A. et al. (szerk.) *Sport – Gazdaság – Turizmus.* Győr, Magyarország: Széchenyi István Egyetem, p. 42.
14. **Péterfi J.** (2018): A Nemzeti Kastély és Várprogram elemzése a kastélyfejlesztés összefüggésének szemszögéből Somogy megye példáján. TERÜLETFEJLESZTÉS ÉS INNOVÁCIÓ 11/2 pp. 29-39.