



SUPPORT DOCUMENT OF THE STUDY HERITAGE HOUSES FOR EUROPE

2. Illustrative Practices on innovative business model cases of European family-owned heritage houses



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Support documents:

1. EU Funding guide to family-owners of heritage houses
2. **Illustrative Practices on innovative business model cases of European family-owned heritage houses**
3. Illustrative Practices on the socio-economic contribution of European family-owned heritage houses
4. Technical Sheet on existing business models of European family-owned heritage houses

Heritage Houses for Europe. Exchange & Innovate.

This document is part of the European project "Heritage Houses for Europe. Exchange & Innovate".

This project has been granted by the European Commission in July 2018 to the consortium European Landowners' Organisation, the European Historic Houses Association and IDEA Consult.

The aims of the project are to:

- ▶ Highlight the positive impact of family-owned heritage houses in Europe;
- ▶ Analyse innovative replicable business models;
- ▶ Create tools (such as the EU funding guide) supporting private owners in the sustainable preservation of their family-owned heritage houses;
- ▶ Raise awareness on the sector of family-owned heritage houses; and
- ▶ Issue recommendations to EU institutions in order to unleash the sectors' full potential.

About these Illustrative Practices on innovative business model cases of European family-owned heritage houses

Out of the 67 case studies of business models presented in Support document 4 (Technical Sheets on existing business models of European family-owned heritage houses) we selected 14 Illustrative Practices on innovative business model because of their exemplary role using innovative business models (use of specific building blocks differentiating their business models from the others). 13 out of those 14 case studies were studied on site. These 13 cases were chosen based on the innovative aspect(s) of their activities (activities directly linked to building blocks identified during the study) and the way those were integrated in the business strategy of the family-owned heritage house. The idea was to go deeper in the analysis and highlight the uniqueness and innovation of those houses. Initially only 10 illustrative practices on innovative business model were foreseen. We had the opportunity to include 4 more. We were however not able to meet and visit Flanderhof (Romania). This is the only illustrative practice not studied on site.

Credit:

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Photo Contest

1. Monsignor della Casa Country Resort & Spa

Italy

Location

Via di Mucciano 7, Borgo San Lorenzo (FI), Italy

Located in the countryside

<https://www.monsignordellacasa.com>



General description

Located just 30 minutes by car or by train from Florence, in the heart of Mugello, land of the Medici family, rich in art and culture, Monsignor della Casa Country Resort & Spa is an estate where you can have a short escape from the city or a longer holiday a few kilometers from Borgo San Lorenzo, surrounded by the beautiful landscapes Tuscany can offer.

The Monsignor della Casa Country Resort & Spa is surrounded by nature, but only 3 km from Borgo San Lorenzo, 5 km from Scarperia and 27 km from Florence.

The region plays a center role in the history of Italian art, only two kilometers from the birthplace of the painters Giotto, Beato Angelico and Andrea del Castagno.

The beautiful Renaissance Villa La Casa was the birthplace, in 1503, of Giovanni della Casa. Known as "Il Monsignore", Giovanni became a cleric in Florence after studying law in Bologna. In Rome, he was close to many prominent personalities, including Cardinal Alessandro Farnese, who appointed him to important offices around Florence. In 1555 he was made Secretary of State of the Holy See and he died in Rome in 1556.

Giovanni della Casa is most famous for his treatise *Galateo*, which remains a milestone in Italian literature and still known throughout Europe as a reference for polite behavior and courtesy.

The estate offers hotel rooms, apartments and villas to rent. Visitors have a choice between several activities: wellness and spa, restaurant, sports. The main villa can also be used to organise meetings and weddings.

Size



Land use

The estate includes forests and agricultural land including a small vineyard. Part of the estate is managed for hunting and nature conservation. While the surrounding land is of great value to the resort (it is recognized by the Italian government as a special landscape area) the main source of income is directly related to the heritage house (the villa and the adjacent Tuscan farmhouses). Most of the visitors' accommodations are located in the farmhouses.

Investments

Principal investments made are related to the restoration of the farmhouses the villa and the garden. The estate has a wellness centre and well-maintained sport infrastructure.

Access

Access only for invited guests (clients of the estate).

Number of visitors

1001-5000

Type of visitors

The estate is attracting national and international visitors whose visit includes at least one overnight stay. Most visitors stay for several days.

Average spending

>250 €

Activities

Commercial activities

- Rooms, apartments and villas for rent
- Wellness and spa
- Restaurant, meetings and wedding

Education, research, community or environmental activities

- Hunting and nature conservation without direct commercial interest.
- The resort is recognized by the Italian government as a special landscape area

Cultural or leisure

- cooking classes & tastings of local products
- truffle hunting
- hiking, touring, and e-bike trips

Products

Wine and olive oil

Turnover

A large part of the income is generated by the renting of rooms, apartments and villas. The restaurant is an important additional income generator. It is open for as well guests of the estate

as for third parties. Weddings, meetings are good for a limited percentage of the turnover. Products and additional activities organized by the estate are an important part of the business strategy but hardly contribute to the turnover.

Price differentiation

The estate offers accommodations in several size (and price) classes ranging from rooms up to apartments and villas (with or without a swimming pool).

Employment

The estate is an important employer (20-30 persons in high season) in the hospitality sector in the region. Personnel includes maintenance personnel, gardeners, personnel for the restaurant and a limited number of people responsible for the daily management. Most of the personnel is locally sourced.

Volunteers

The estate is not making use of volunteers.

Focus on local suppliers

Yes

Selling channels

Wholesale – Retailer – Direct

Key partners

- commercial national and international organizations active in the hospitality sector including travel agents
- food suppliers

Communication

Newspaper – Magazine – Online – Directories – Social media – Direct mail – Leaflets

While marketing is important the high number of returning visitors enables the estate to keep a personal contact with their customers making use of direct mail. The most important marketing channel are the catalogues of travel agents and the website. Social media is becoming more and more important. Care is taken to react fast and correct on negative messages with a personal message to the client. Occasional advertisement in magazines is taken.

SWOT

Strengths

- ☒ Property includes land
- ☐ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☐ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☒ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Customer intimacy

Customer intimacy and product leadership are competing business strategies in the management of this Estate. While offering high quality rooms, apartments and houses the management slightly favours the customer intimacy business strategy. This results in visitors really feeling at home and having a personal relationship with the owners.

Innovation

Anchorage of/in local community/economy

The estate is an important local employer.

Focus on uniqueness and story-telling

Story telling is an important marketing instrument (the story of Giovanni della Casa). At the end of their stay visitors get the possibility to visit the villa and the garden of the villa once belonging to Giovanni della Casa. The owners take the opportunity to educate the visitors on the estate's history and to give their visitors additional information on local products, habituated and history.

Contributing to physical and mental health and well-being

The wellness and spa facilities are especially in the lower season an added value to the estate

Service-oriented

Main focus of the business strategy is delivering an exceptional service to clients. This becomes clear in the personalized service to each of the visitors. Service oriented is combined with high quality lodging.

Multifunctionality

Next to lodging the estate has a number of other activities including agriculture, wine, meetings and weddings.

2. Miravel

France

Location

Domaine de Miravel, 34 390 Vieussan, France

Located in the countryside

<https://www.miravel.eu>



General description

The main house of Miravel - Moulin de Graïs is a large 18th century manor house newly renovated to 21st century standards and equipped for max 32 persons. The house has been renovated for 8 years with respect for the environment, traditions and high-tech functionality and quality.

Miravel aims to combine environmental, social and economic sustainability with a modern and comfortable life. This translates in practice into a conscious choice of organic materials, equipment and optimal use of resources, notably sun, water and wood.

In these days of growing awareness of man-made impact on the environment including on climate change, Miravel made conscious choices regarding energy and water resources saving in particular.

Size

Floor area heritage house	Total land area				
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha

Land use

The manor house is surrounded by 4 ha of land bordering directly the river Orb in the heart of the Natural Park of Haut Languedoc. This Mediterranean garden is naturally divided into three vegetation systems.

Closest to the house and the swimming pool, playground and old mill areas are a few beds of flower and fragrant terraces and paths with Mediterranean and exotic plants. Further away, overarched by the majestic hall mark of the property, a several hundred years old pine tree, the orchards are grown in terraces with olive, almonds, truffle oak, cherry, peach, apricot, orange and fig trees, along with grapes and capers. The original garrigue is maintained in the outermost parts of the

garden, with shady evergreen oaks and ficus (prickly pear), juniper, cactus and shrubs, naturally limited by the river Orb or small spring beds in the rocky ground.

A particularly rich fauna populates the garden, from singing birds of all sizes, forms and colours, humming honey bees, whistling cicadas and splashing fish and frogs to silent bats and owls at night.

Investments

Most of the investments made are directly related to the restoration of the house and its surrounding garden. The building has been renovated from 2000-2007 with quality materials and equipment including organic painting and insulation materials, wood from sustainably managed forests, reuse of tiles and other materials (like doors and furniture) whenever possible. In addition, natural materials (wood, cotton, wool, linen, etc.) and traditional methods have been preferred for synthetic industrial ones.

Access

Access only for invited guests (clients of the estate).

Number of visitors

101-1000

Type of visitors

The estate is attracting national and international visitors travelling in groups up to 35 persons. The estate is an ideal location to give courses to groups of like-minded people.

Average spending

10-50 €

Activities

Commercial activities

- Renting of the house for short periods
- Meetings, conferences

Education, research, community or environmental activities

- Restoration with organic only materials
- Durability is the leading theme
- Conservation actions for bats
- Participation in numerous local activities

Cultural or leisure

- Concert
- Fishing, canoeing
- Hiking & biking
- Nature discovery

Products

Limited production of olive oil

Turnover

A large part of the income is generated by renting the house. Meetings and courses organized in the house are good for a limited percentage of the turnover. Products and activities organized by the estate hardly contribute to the turnover.

Price differentiation

There is a seasonal differentiation in renting prices.

Employment

The estate is small employer, mainly focusing on the maintenance of the house and the garden. All of the personnel is locally sourced and gets contracts giving them extra social security compared with other similar activities in the region.

Volunteers

The estate is not making use of volunteers.

Focus on local suppliers

Yes

Selling channels

Direct

Key partners

- companies providing the estate with ecofriendly solutions and products ranging from cleaning products, bedding up to organic building materials
- local construction companies

Communication

Online – Social media – Leaflets

Main marketing tools are the website, social media, internet tools (trip advisor, ...) and flyers. Many of the visitors are returning. They provide the main marketing tool by informing third parties on the possibilities of the house. The estate is collaborating very closely with Gites de France, Parc nationale de Languedoc, tourism information offices and 'bio'-labelled producers.

SWOT

Strengths

- ☒ Property includes land
- ☐ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☐ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☐ Increasing interest from the public

Threats

- ☒ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Customer intimacy

Customer intimacy is clearly the main business strategy resulting in a personal contact with the owners who will do everything they can to make your stay as comfortable as possible. The strong focus on durability in every aspect of the management of the estate is typical for a product leadership strategy but is here the consequence of the owners' vision on the need to conserve biodiversity and act against climate change wherever possible. Durability is however not the main selling or marketing strategy but is used as a differentiator within the large number of holiday houses in the region following a customer intimacy strategy.

Innovation

Anchorage of/in local community/economy

Local employer.

Service-oriented

The owners have personal contacts with most of their customers. They support their visitors as much as possible in realizing their objectives when giving courses, meetings, ...

Sustainability

Sustainability is the main differentiator of this estate. Central heating is provided by a high tech – high efficiency wood combustion stove. Connected to this are the solar panels which primarily produce the sanitary hot water. In addition, small wood fueled stoves are placed in several living rooms to ensure full comfort also when the central heating is not required in spring and autumn. Energy saving (A category) household machines are provided for dish and laundry washing, and low energy bulbs and timers are used whenever possible. Water savings are provided by special installations, for example toilets with 1/2 and full flush, only few water efficient bathtubs, water saving household machines (dishwasher and washing machine), rainwater collection, etc. The energy is produced via producers of renewable resources and energy resources.

All the above efforts would be vain if not complemented by environmentally sound every day gestures which are summarised in recommendations to dwellers at Miravel. The estate is having the Clé vert label for the past 10 years.

3. Château de la Ferté-Saint-Aubin

France

Location

2-4 rue du Général Leclerc, 45240 La Ferté Saint Aubin, France

Located at the border of a village

<https://www.chateau-ferte.com>



General description

The castle of La Ferté-Saint-Aubin (Château de La Ferté-Saint-Aubin) is located at the border of a village, La Ferté-Saint-Aubin, in the French department Loiret. The castle was built in the 16th century commissioned by Henri de Saint-Nectaire. During the last centuries the castle was owned by different families. In 1987 it was bought by Jacques Guyot who started a major renovation. Today the castle is owned by his son, Lancelot Guyot. The Guyot family is renowned for developing business plans to make profitable enterprises from the castles they own.

Size

Floor area heritage house	Total land area				
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha

Land use

The castle is surrounded by moats and consists of two parts. The smaller part (on the left side) was built between 1590 and 1620. The larger part was built in the seventeenth century. The surrounding park is 40 ha. Originally a French garden it was transformed into a landscape garden in the 19th century. In 1992 the restoration of the garden was started based on the original plans of the landscape garden.

The surrounding land is an added value to the castle but is not a source of financial income as such.

Investments

Major renovation works were carried out when the castle was bought by Jacques Guyot in 1987. Those

renovation works were necessary to save the castle from further decline. The further renovation works were spread over time and even today the renovation is still the most important investment in the estate.

Access

Open to the public. An entrance fee is asked.

Number of visitors

>50000

Type of visitors

The estate is attracting national and international visitors. However a large share are French families with children attracted by the many activities organized by the owner.

Average spending

0-10 €

Activities

Commercial activities

- Entrance fee to the castle and park
- Additional fees for events
- Bed and breakfast

Education, research, community or environmental activities

- Discovery tour
- Museum telling the history of the castle
- Collection of old games and dolls

Cultural or leisure

- Discovery trail trying to find the secret room
- cooking demonstrations and degustations
- escape room & mystery games/plays
- Adventure trail and family games
- Easter egg run & Christmas event
- Activities in the park

Products

Tourist shop with local products and toys

Turnover

Most of the income is realized by the entrance fees and fees to participate in the different activities organized throughout the year.

Price differentiation

The entrance fees are differentiated by age, activities chosen, interior vs exterior activities, mobility of visitors and number of visitors (reduction for larger groups).

Employment

The day-to-day management is carried out by 2 full time staff members. During high season an additional 4 full time equivalents are supporting the staff members.

Volunteers

When organizing larger events (e.g. the eastern egg run) volunteers support the staff members.

Focus on local suppliers

Yes

The most important suppliers are building companies specialized in the restoration of heritage houses. More than 75% of all expenses involve local companies and organisations.

Selling channels

Retailer - Direct

Entrance fees are payed by visitors directly to the castle. For renting the Bed and Breakfast rooms the castle is making use of specialized webcompanies including booking.com, trip advisor, ...

Communication

Newspaper – Magazine – Radio –Online – Social media – Direct mail – Leaflets – Billboards

There is a broad marketing mix ranging from radio advertisements to internet and social media, printed mail, flyers and billboards.

SWOT

Strengths

- ☒ Property includes land
- ☐ Long term strategic planning
- ☐ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☒ Limited financial resources
- ☒ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☒ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Product leadership

The owner clearly has chosen for a product leadership strategy in the field of history telling games, including adventure games, escape rooms, animated visits. Where in the past innovations in this field were only copied after 10 years this period is now closer to 3 years. So there is a need for more innovation making sure you have to offer something other heritage houses in the same regions do not have.

Innovation

Focus on uniqueness and story-telling

Story telling is at the center of the business plan of this estate. There is a mix of educational and gaming activities. All of the activities make use of the history of the castle.

Networking between heritage houses

As the owner manages another two castles and the family is owning several others there is strong networking within the family. The family is also keeping close contact with other castle owners.

Service-oriented

The main focus of the business strategy is to animate the visitors. Games are developed based on the experience and feedbacks of customers.

Multifunctionality

Visitors can visit the castle and the park including several exhibitions. They can also play games inside or outside at different difficulty levels. The castle is also offering a limited amount of rooms to be rented as bed and breakfast. There is a large room which is regularly used for weddings. Also meetings can be organized in this part of the castle.

4. Rūmene Manor

Latvia

Location

Kandava district, LV-3120, Latvia
Latitude: 57.058213210287455
Longitude: 22.727837562561035

Located in the countryside

<https://www.rumene.lv/en>



General description

Rūmene Manor is located in the countryside of Latvia not far from the capital city. The countryside surrounding the house offers exquisite views of blooming meadows, fields of grain and forests. The manor house is a 19th century Neo-Gothic building, surrounded by a seven hectare landscaped park nestled at the shore of its own lake. Rūmene Manor is the country residence of the 5 star Hotel Bergs, a Small Luxury Hotels of the World. The Manor House offers five quiet, private apartments, the largest of which occupies two storeys, with access to a spacious terrace and a splendid view of the park and lake. Two additional two-storey apartments are located on the second floor of the house, while two more secluded, romantic one-room apartments are located on the third floor.

The Stable has five two-storey apartments, each furnished and decorated in a light, airy style, and each with a separate entrance through a small garden. The Garden House features four comfortable double occupancy apartments and a terrace facing the park. The Rūmene Manor has several common rooms available for celebrations. Each space has a slightly different atmosphere, allowing guests to choose the most appropriate for their particular event.

The first floor and parts of the basement of the manor house have been designed as public spaces to host banquets, larger dinners, chamber concerts or meetings. Five private apartments are located on the second and third floors. The Rūmene Manor concept corresponds with the internationally recognised categories of resort and executive retreat. Hence, the numerous opportunities for recreation, as well as corporate meetings and

events with full-service facilities are aimed at clients who appreciate rural elegance and value the privacy provided by the manor.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
Total land area					

Land use

The Rūmene Manor is surrounded by an extensive park covering nearly seven hectares. The park has been restored along with the manor buildings and contains some of the 364 original rare tree specimens, as well as an orchard and quaint gravel roads, as is typical in this type of rural landscape. In the spring of 2015 Rūmene Manor has opened a private 4-hole golf course next to the property.

Investments

Main investments are directly related to the restoration of the house and the decoration of the rooms.

Access

Access only for invited guests (clients of the estate).

Number of visitors

1001-5000

Type of visitors

The estate is attracting national and international visitors whose visit includes at least one overnight stay. Most visitors stay for weddings and conferences organized at Rūmene Manor.

Average spending

>250 €

Activities

Commercial activities

- Apartments and houses for rent
- Wellness and spa (Latvian bath house)
- Restaurant
- Meetings and wedding

Education, research, community or environmental activities

- hunting and nature conservation

Cultural or leisure

- golf
- cooking classes & wine tasting
- musical presentations
- porcelain painting classes
- hiking, touring, biking and boating

Products

None

Turnover

A large part of the income is generated by renting space for weddings and meetings. An important additional income is generated by the renting of rooms, apartments and houses. Often they are rented to guests present because of the meetings and weddings organized at Rumene Manor. Individual reservations are offered in certain periods of the year.

Price differentiation

The estate offers accommodations in several size classes ranging from rooms up to apartments and houses with different surfaces.

Employment

Most of the personnel is coming from the capital, Riga. This is a logic choice seen from the business strategy implemented (product leadership). Preference is given to personnel living up to the high standard of the guests visiting the house.

Volunteers

The estate is not making use of volunteers.

Focus on local suppliers

No

Quality is the most important differentiator. Where the suppliers are coming from is of less importance.

Selling channels

Wholesale – Retailer – Direct

Key partners

- Building companies specialized in the restoration of heritage houses. Latvian architect Zaiga Gaile led the reconstruction of the Rūmene manor house, adding modern amenities to the property and garnering the Latvian Association of Architects award for Best Reconstruction Project in 2008.
- Food and beverage suppliers
- Maintenance
- Park maintenance
- Greenkeeper (golf)

Communication

Newspaper – Magazine – Online – Directories – Social media – Direct mail – Leaflets

Marketing is especially done through travel agents selling high end visitors' accommodations. Travel sites on the internet complement this. Rumene Manor also makes use of a mix of marketing instruments (magazines, flyers, newspaper articles, ...) all with the aim to reach a public with high quality demands.

SWOT

Strengths

- ☒ Property includes land
- ☐ Long term strategic planning
- ☐ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☒ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☐ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Product leadership

Rumene Manor has chosen for a straightforward product leadership strategy where quality is put at the forefront of whatever they do. The award-winning renovation of the manor was completed to the most exacting standards in 2009. Rumene Manor is the country residence of the 5 star Hotel Bergs, a Small Luxury Hotels of the World, and provides a wealth of activities in a haven of luxury for discerning guests from near and far. Everything in the house appears touched by a fine patina of time, while the furnishings and built-in items are genuine and handmade.

Innovation

Focus on uniqueness and story-telling

Story telling is an important marketing instrument but is only supportive to the offering of high quality accommodation.

Contributing to physical and mental health and well-being

The wellness and spa facilities (Latvian bath house) are especially in the lower season an added value to the estate

Networking between heritage houses

Travel agents are carefully chosen and most often have a specialty in high quality offers. The owners participate in several networks bringing together heritage house owners.

Multifunctionality

Next to lodging the estate has a number of other activities including golf, wine, meetings, weddings, exclusive courses (cooking, painting, ...).

5. Palácio Fronteira

Portugal

Location

Largo de São Domingos de Benfica nº 1, 1500-554
Lisboa Portugal

Located in the city

<https://www.frenteira-alorna.pt>



General description

The Fronteira palace is a well-known seventeenth-century heritage house in Lisbon. It holds the largest collection of seventeenth-century azulejos (Portuguese tiles) preserved in situ. The beautiful seventeenth-century gardens have a collection of decorations inspired by Portuguese History. The palace was built around 1670. Originally it was used as a second residence by the Mascarenhas family. After the Lisbon earthquake the family main downtown residence was destroyed and they moved to this house in 1755.

The palace is preserved in a form very close to its original design. It is classified as a national monument. The Fronteira palace is home to the "Foundation of the Houses of Fronteira and Alorna," a private non-profit organization. The Foundation is very active in the cultural arena, raising public awareness about the preservation and diffusion of cultural heritage, supporting research on the material and cultural heritages related to this site, and attracting new audiences to cultural events. It offers a regular program of activities open to all, which includes classical music concerts, a book club, lectures, courses and workshops, poetry recitals and conferences.

The Palace's extraordinary collection of azulejos, as well as its seventeenth-century gardens and architecture make it an interesting stopover for tourists visiting Lisbon. There are guided tours every day, all year round, except on Sundays and on bank holidays. During the tours to the interior of the palace, visitors have access to the main state rooms: the Battles room, Panels room, Juno room, Library, the Terrace of Liberal Arts and the Chapel. Outside, visitors can walk through the gardens and enjoy both the Casa do Fresco (House of Freshness) and the King's Gallery and lake at the South end of the formal garden.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m2					
500-2500 m2					
0-500 m2					
	Total land area				

Land use

The palace has 5,5 ha romantic gardens full of fountains, lakes and statues. The garden was built in the 1660s.

Investments

Preserving a seventeenth-century Palace and its surrounding gardens and woods is a never-ending task, which demands care, continuous financial investment, and a long-term restoration policy

Access

Entrance fee

Number of visitors

>50000

Type of visitors

The Palace's extraordinary collection of azulejos, as well as its seventeenth-century gardens and architecture make it an interesting stopover for tourists visiting Lisbon.

Average spending

0-10 €

Activities

Commercial activities

- Guided (house) & non-guided visits (garden)
- Renting meeting rooms for cultural initiatives

Education, research, community or environmental activities

- Thematic tours guided by experts
- Reading groups (thematic)
- Library, including online access
- Publications on cultural topics
- Research topics linked to the objectives
- Educational service targeting schoolchildren

Cultural or leisure

- Bridge tournaments
- Cultural activities, expositions, conferences
- Musical & poetry recitals
- Meetings on themes of history, art history, (landscape)architecture, literature, etc.

Products

Products related to the house and the activities of the foundation

Turnover

The Friends Association regularly organizes fund-raising activities, such as dinner-debates, concerts, dances, conferences, tea-parties and canasta (card game) tournaments

Price differentiation

Price differentiation based on the type of visit: guided tour to the house, non-guided tour of the garden. Some of the activities of the foundation are free, for others an entrance fee is asked. Friends of the foundation (membership 5,-€ have discounts on entrance fees).

Employment

Most of the employment is related to the maintenance of the house and the gardens, including restoration work, gardeners, ... To support the main events of the foundations a small team is involved on a full-time basis. Especially during the touristic season several guides are active.

Volunteers

Several volunteers are involved in the different activities of the foundation.

Focus on local suppliers

Yes

Selling channels

Retailer – Direct

Key partners

- Cultural organisations
- Artists
- Musicians
- Lisbon tourism office

Communication

Newspaper – Magazine – Radio – Television – Online – Directories – Social media – Leaflets
Marketing efforts are limited. The main marketing tool is the website of the foundation. Due to the high number of tourists visiting the heritage house a lot of additional information is available through websites and social media.

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☒ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☒ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Customer intimacy

The foundation is making use of a customer intimacy strategy. Activities are focused on the demand of their visitors interested in culture. The foundation aims to organize cultural activities accessible to the larger public maintaining a high-quality standard. Due to the large number of visitors, especially during the summer season, you could expect a larger interest in operational excellence. This is however not the case resulting in sometimes negative comments from visitors on opening times, waiting time, ...).

Innovation

Anchorage of/in local community/economy

The foundation cooperates closely with local artists, musicians and cultural organisations. There is a mix of local volunteers and local employment. Several activities are focusing on the local communities (e.g. canasta tournament)

Connecting communities

Volunteers and visitors are the main marketeers of the foundation.

Focus on uniqueness and story-telling

The main objective of the foundation responsible for the heritage house is educating the public on cultural topics. Formal story-telling through exhibitions, guided tours, cultural events plays a very important role in most of the activities organized.

Multifunctionality

Diversifying the sources of income has proven to be a resilient strategy and a sustainable business model. This model has been in place for the last thirty years. It has enabled the institution to survive as a private entrepreneurial non-governmental organization, and made it possible for this ancient manor house to adapt to modern times while serving the public good.

6. Heetveldemolen

Belgium

Location:

Munkbaan 1, 1570 Tollembeek, Belgium

Located in the countryside just outside a village

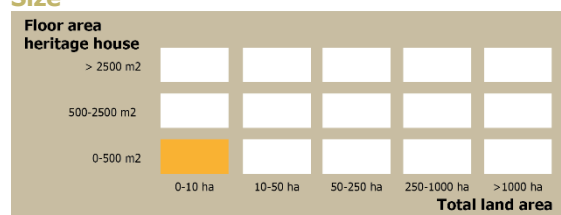
<https://www.heetveldemolen.be>



General description

The 'Heetveldemolen' along the river Mark in Tollembeek, Belgium, is an old but still active water mill. The mill originally belonged to the Castle of Heetvelde. A first reference to the mill dates back to 1440. In 2014 the mill was recognized as an 'active mill' by 'Molenforum Vlaanderen' an organization promoting and supporting owners of mills. In 2018 the Heetveldemolen received the public participation prize of the Flemish Agency for Cultural Heritage. The managing association (an NGO) turned the mill into a meeting point bringing all kinds of people together around an ancient craft. Folklore, education, research, technology, renewable energy, fair trade, art, ... are areas in which this non-profit organization invests, both at regional and national and sometimes even at international level.

Size



Land use

The heritage house is managed without the use of additional land.

Investments

Principal investments made are related to the restoration of the mill.

Access

Access limited to a number of days throughout the year, often combined with specific activities.

Number of visitors

1001-5000

Type of visitors

The mill is attracting especially local visitors (Flanders) participating to one of the public activities organized by the managing NGO.

Average spending

0-10 €

Activities

Commercial activities

- Milling
- Different types of flour for sale

Education, research, community or environmental activities

- Guided tours
- Renewable energy
- Research related to the ancient craft

Cultural or leisure

- Guided tours in combination with hiking trails
- Several events where the mill plays a central role
- Folklore related events

Products

Different types of flour (wheat, rye, oat, spelt)

Turnover

Generated income is used for 100% to maintain the mill and to keep it operational.

Price differentiation

Product based

Employment

Does not apply

Volunteers

All of the activities are supported by volunteers.

Focus on local suppliers

Yes

Selling channels

Direct

Key partners

- Other NGO's sharing the same value.
- Government agencies and NGO's promoting cultural heritage

Communication

Newspaper – Magazine – Online – Social media

Marketing efforts are minimal. Especially the website, newspaper and magazine articles are attracting visitors.

SWOT

Strengths

- ☐ Property includes land
- ☐ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☒ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☒ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Customer intimacy

Activities and visits are directly related to the objective of the managing NGO with a strong focus on the involvement of the local populations and other NGOs sharing the same values.

Innovation

Connecting communities

This project is 100% volunteer driven. Local framers and other NGO's are systematically involved in the activities resulting in a strong interaction between local stakeholders.

Focus on uniqueness and story-telling

Due to the very long history of the mill story-telling is an inevitable part of the guided tours.

7. Fort van Oelegem

Belgium

Location:

Goorstraat 19, 2520 Oelegem, Belgium

Located just outside the city

<https://www.fortoelegem.be/index.html>



General description

The fort of Oelegem was part of the main defense line around Antwerp also known as the 'Stelling of Antwerp'. Construction took place between 1909 and 1914. During the Battle of Antwerp in World War I, the fort stayed outside the attack zone and after the fall of Antwerp it fell into the hands of the German army.

Towards the end of the 1930s, the fort was converted into an infantry support center. During the Second World War, the fort of Oelegem only played a modest role: in 1944 the fort served as a communication center for the Allies defending the port of Antwerp.

After the Second World War, the fort no longer had a military function, it was looted and began to fall into ruins. Fortunately, the fort turned out to be an ideal place for bats. The fluttering mammals have found an ideal wintering place where they can find the peace they need.

When Natuur 2000 (association for nature study and environmental conservation) discovered that the fort was an important wintering place for bats, the organization decided to rent the fort in 1984 from the private owner (a company in which the family has decision power). Over the years, Fort of Oelegem grew into a bats reserve and a center for nature education and, moreover, the building was designated a monument on 9 June 1995 together with the ramparts.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
Total land area					

Land use

45 ha forest and nature are surrounding the fort of Oelegem. This land is managed by the Nature NGO in function of the bat populations present in the fort.

Investments

Principal investments made are related to the conservation of the bat populations present on the fort.

Access

Access limited to guided tours on pre-announced dates or after appointment

Number of visitors

101-1000

Type of visitors

The fort is attracting especially local people interested in nature and nature conservation.

Average spending

0-10 €

Activities

Commercial activities

- No commercial activities

Education, research, community or environmental activities

- Guided visits to the bat populations
- Research on the bat populations present

Cultural or leisure

- Participation to cultural or leisure activities organized by third parties

Products

Not applicable

Turnover

A large part of the income is generated by a contribution asked to participate in the guided visits.

Price differentiation

A discount to the regular price of the guided tours is given to children younger than 12 years or for people over the age of 65.

Employment

Does not apply.

Volunteers

All of the activities are supported by volunteers.

Focus on local suppliers

No

Selling channels

Direct

Key partners

- Since 1984, the Fort Oelegem workgroup, an NGO active in nature conservation and nature research, has managed the

monument and the bats hibernation site of Fort Oelegem.

Communication

Newspaper – Magazine – Online – Social media

No real marketing efforts are undertaken. The website, local newspaper articles and articles in nature conservation magazines are the main marketing tools.

SWOT

Strengths

- ☒ Property includes land
- ☐ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☒ Limited geographical reach
- ☐ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☐ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☐ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Customer intimacy

A customer intimacy strategy is implemented without really making a choice to implement a specific business strategy. With the limited support coming from 100% of volunteers the managing NGO tries to implement as much as possible people with an interest in nature conservation and bat populations.

Innovation

Connecting communities

100% of the activities is supported by volunteers.

Focus on uniqueness and story-telling

Even with the very rich history of the fort related to World War I and II only partial use is made of the unique features of the fort. Story-telling is focusing mainly on the unique bat populations present.

Sustainability

Nature conservation is the main goal of the managing nature NGO, including the protection of the largest bat population in Flanders.

8. Kasteel Hex

Belgium

Location:

Hekslaan, 3870 Heers

Located in the countryside

<https://www.hex.be/en/>



General descriptions

Central to the estate is the castle with the walled gardens and the park. To the west of the castle, in the Broekom valley, lies the Manshoven farm with its rich meadows and behind the farm the beautiful Manshoven forest. To the east of the castle, in the middle of the fertile plateau, you can find the Monnikenhof farm with its vast fields. A third farm is located on the Hekslaan opposite the castle. There are also a number of beautiful old houses in the country style of the 19th century on the Hekslaan, such as the nunnery and the old sawmill. Finally, the old water mill, located lower in the village on the banks of the Herk, also belongs to the estate.

Size

Floor area heritage house	Total land area				
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha

Land use

A number of formal ornamental gardens can be found in the immediate vicinity of the castle. Louis Fuchs was commissioned in 1871 by the then lord Alfred I d'Ansembourg to redraw the park and surroundings of the castle in the landscape style of that moment. Today, the elongated valley of Fuchs with its slightly undulating character and its selected solitary and tree groups is one of the main attractions of the estate and a textbook example of a landscape park, moreover almost intact. The vegetable garden of Hex is famous throughout the country. The historical framework and its excellent location play a role here. The garden is situated on a slightly sloping surface right in the sun and is protected from the cold wind by a high wall

in the northeast. It has a special quality of sandy loam soil. The combination of fruit, vegetables and flowers makes him a feast for the eyes. On the estate you can find 3 farms. Agricultural land is partly leased, partly used by the family.

Investments

The heritage house is fully renovated. Nevertheless, restoration remains a major activity taking most of the investment funding. Also the daily maintenance of the park and the gardens demand an important investment.

Access

Access is limited. However, the gardens and park are open to visitors twice a year. The garden days of Hex are an excellent opportunity for garden lovers to acquire special plants and to consult with specialists.

Number of visitors

5001-50000

Type of visitors

During the garden festival the estate is attracting national and international visitors who are passionate by plants and gardens. International visitors often stay overnight in the neighborhood of Hex.

Average spending

10-50 €

Activities

Commercial activities

- Garden festival
- Farming
- Forestry

Education, research, community or environmental activities

- Nature conservation
- Part of the estate is Natura 2000

Cultural or leisure

- Occasional guided tours

Products

Agricultural products, forest products

Turnover

Main sources of income are related to agricultural and forestry activities. The garden festival is an additional source of income and gives the public the possibility to visit the castle, the park and the gardens.

Price differentiation

Entrance tickets bought through the castle's website are 15% cheaper compared with tickets bought onsite.

Agricultural and forest products are market regulated prices.

Employment

A limited staff is responsible for the daily maintenance of the house, the park and the gardens.

Volunteers

The estate is making use of volunteers during the garden festival.

Focus on local suppliers

No

Selling channels

The estate is selling tickets for the garden festival using the castle's website. Tickets can also be bought at the entrance of the garden festival. Agricultural and forestry products follow traditional selling channels.

Key partners

- Exhibitors of garden products.
- Producers of agricultural equipment and materials
- Forestry related companies

Communication

Newspaper – Magazine – Radio - Online – Social media – Direct mail – Leaflets

Marketing through own website, magazines and newspaper articles. Direct mailing to former visitors of the garden festival.

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☒ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☒ Regulation
- ☐ Decrease of public funding
- ☒ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Product leadership

A mixed business strategy with the main accent on

product leadership. This results in an excellent management in the field of agriculture, forestry and opening up of the estate. The product leadership strategy is very visible in the organization of the garden festival where quality is more important than quantity.

Innovation

Connecting communities

The estate is making use of local volunteers for the organization of its public events.

Focus on uniqueness and story-telling

The estate has a very rich history. Story-telling is however a side product of the other activities.

When story-telling is used quality remains a major concern when producing communication products resulting in e.g. a very rich illustrated and qualitative book on the history of the estate.

Contributing to physical and mental health and well-being

A medical garden was designed by Isabelle Cornette including a discovery tour through 25 medicinal plants, which are essential to create a healthy garden, to make remedies for the natural family pharmacy and to process the plants in delicious and healthy recipes.

Networking between heritage houses

The owner plays an important role in the local and European network of heritage house owners.

Multifunctionality

A mixed business strategy including several business opportunities including agriculture, forestry and garden festival.

Sustainability

An important part of the estate is part of the European Natura 2000 area.

9. Ledreborg Palace

Denmark

Location:

Ledreborg Alle 2D, 4320 Lejre, Denmark

Located in the countryside

<http://www.ledreborgpalacegc.dk>



General description

Ledreborg Palace was built in 1740-45 by Count Johan Ludvig Holstein Ledreborg.

The palace has a unique Courtyard. The main building contains a unique collection of original furniture and paintings. Ledreborg Palace is one of the finest examples of 18th century architecture and landscape architecture.

The current owner has chosen to live on the ground floor of the palace. The first floor still has its original interior.

During the summer period Ledreborg Castle can be visited with guides.

Ledreborg Palace is a family-run property with agriculture, forestry and hunting activities.

Size

Floor area heritage house	Total land area				
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha

Land use

Ledreborg has a surface of 1600 hectares of which 50% is forest and 50% is arable land. The estate includes a large park and a golf course.

Investments

Major investments were made in the restoration of the house and the surrounding park. From the beginning the restoration of the estate kept in mind the development of multiple activities, including a golf course. A very large part of the estate is managed as forest or as agricultural land. Those activities are asking for continuous investments in equipment and maintenance of this equipment.

Access

During the summer months Ledreborg Palace is open to visitors. Several attractions are set up to attract a additional public. Throughout the year the estate is organizing a number of yearly activities for the larger public. The estate welcomes companies for a number of activities varying from team buildings up to meetings and conferences.

Number of visitors

>50000

Type of visitors

The estate is attracting visitors during the summer months. Throughout the year people are visiting the estate during yearly activities. Companies are welcome throughout the year.

Average spending

10-50 €

Activities

Commercial activities

- Company events, meetings, conferences
- Renting of holiday houses & business space
- Recording of films, TV and commercials
- Fly high
- Lifestyle exhibition

Education, research, community or environmental activities

- Guided tours
- Hunting
- Nature conservation

Cultural or leisure

- Horse riding
- Gold course
- Concerts

Products

Wood, agricultural products, game

Turnover

The total turnover is realized by a combined income of forestry, agriculture and a large range of events and activities organized on and by the estate.

Company events play an important role as it is also the case with the golf course.

Price differentiation

Guided tours are organized with different levels of luxury: a champagne tour can be combined with a dinner on the estate.

The number of visitors in a group is having its effect on the income price. This is also the case with the age of the visitor.

Agricultural and forest products are sold at market regulated prices.

Employment

The estate is an important employer in the region. Most of the personnel is locally sourced. Personal is active in agriculture, forestry, guided tours, event organizing, hospitality, golf course, hunting, ...

Volunteers

The estate is making use of volunteers when organizing large public events.

Focus on local suppliers

No

Selling channels

The estate is selling tickets for its guided tours and yearly activities at the entrance. Pre-booking can be done by mail and telephone. Company events are ordered by mail or phone directly at the booking office of the estate.

Agricultural and forestry products follow traditional selling channels.

Key partners

- Building companies specialized in the restoration of heritage houses.
- Producers of agricultural equipment and materials
- Forestry related companies

Communication

Newspaper – Magazine – Radio – Television – Online – Directories – Social media – Billboards

Marketing is differentiated. A broad set of marketing instruments including website, social media, flyers, newspapers, magazines, radio and television is used to promote the estate's annual and summer activities. Separate marketing channels are set up towards companies. Here a more direct marketing campaign is organized using personal contacts with companies.

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☒ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Product leadership

A very clear product leadership strategy where quality is at the forefront of everything done or organized.

Innovation

Anchorage of/in local community/economy

The estate is an important local employer.

Focus on uniqueness and story-telling

The estate has a very rich history. Story-telling is however a side product of the other activities.

When story-telling is used quality remains the estate's main concern.

Multifunctionality

The estate is having a very broad range of activities ranging from agriculture, forestry, company events, guided tours, music festivals,... The estate is an example of the use of multifunctionality as an important tool to diversify its activities and to limit income fluctuations.

10. Gisselfeld Kloster

Denmark

Location:

Godskontoret, Gisselfeldvej 12 A, 4690 Haslev, Denmark

Located at the border of a village

<http://www.gisselfeld-kloster.dk>



General description

Gisselfeld Castle was built in 1534 as a defensive Castle - with a surrounding wall, drawbridges, embrasures, shutter holes, and a moat. On three sides Gisselfeld was surrounded by moats - to the north by the so-called Castle lake.

During a period from the beginning of the 19th century Gisselfeld has been replastered and whitewashed before it regained its original red brickwork between 1869 and 1874. From one of the rooms in the west wing a secret staircase led down to a room in the cellar, where Peder Oxen is said to have hidden, after having fallen into disgrace and, therefore, went abroad. Today the Supreme Manager is living in a part of the Castle, whereas other parts of the main building are open to guided tours.

Every year more than 40,000 guests pay a visit to Gisselfeld. They all come to enjoy the old renaissance castle, the beautiful castle park, and the surrounding "pearls" of nature.

The present castle park of approximately 40 hectares was laid out towards the end of the 19th century by H.E. Millner, the famous English landscape architect. An English landscape garden with beautiful oases and botanic rarities which is definitely worth visiting

The greenhouse is inspired on the the impressive growth house "Crystal Palace" at the World Exhibition in London in 1851. Today the greenhouse is leased by Stig Lauritsen, Garden Designer and television celebrity. He is running the greenhouse as a house for sensory experiences, focusing on historical and exotic plants. In the greenhouse you will also find a small shop selling flowers and art ware for connoisseurs.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	Total land area				

Land use

Much of Gisselfeld Klosters earnings is derived from agriculture and forestry, spread over nearly 4,000 acres. Agriculture currently includes nine farms and 1,450 hectares designated as agriculture, brackish, feeding crops and meadows. Forestry activities are 2,350 hectares incl. lakes, bogs, meadows and roads - and acts as a traditional forestry with timber production and a significant production of Christmas trees and greenery. Gisselfeld provides grazing for animals in the corresponding meadows, and parts of Gisselfelds pasture are rented out for crops.

Gisselfeld Kloster has 125 quite different tenancies which are let out to private persons and trade purposes. Most of the houses are one-family houses and a few ones double houses and are situated in isolated places. Bigger or smaller gardens belong to all the houses, and in some of the premises it is possible to keep horses or other animals. From 55 m² to 700 m² beautiful idyll for the tenants who prefer peaceful surroundings.

Investments

Major investments were made in the high quality restoration of the house and the surrounding park. A very large part of the estate is managed as forest or as agricultural land. Those activities are asking for continuous investments in equipment and maintenance of this equipment. An important investment are the 125 quite different tenancies which are let out to private persons and trade purposes.

Access

During the summer period (from the end of March up to the end of November) and during special events the estate is open to the public.

Number of visitors

5001-50000

Type of visitors

The estate is attracting mostly national visitors.

Average spending

10-50 €

Activities

Commercial activities

- Events
- Meetings, parties and weddings
- 125 houses for rent
- Forestry & agriculture
- Restaurant

Education, research, community or environmental activities

- Botanic park

Cultural or leisure

- Classic motor show
- Christmas market & life style fair
- Opera gala & theatre festival
- Fishing & hunting

Products

Agricultural & forestry products, Christmas trees

Turnover

A large part of the turnover is realized with the agricultural and forestry activities. Also, the renting of 125 houses is an important income. There is a considerable income from the entrance fees of the visitors to the castle and the park.

Price differentiation

Visitors to the park are differentiated by age. Discounts are also given to returning visitors who can buy a season ticket or a combined season and Christmas market ticket.

The estate rents houses in several size classes. Agricultural and forest products are sold at market regulated prices. You can also choose self-felling, in which case the client is referred to specific stands. The purchaser is responsible for the entire process of working up the wood himself.

Employment

The estate is an important employer in the region (> 50 persons). Personnel is active in agriculture, forestry, garden and park maintenance. Most of the personnel is locally sourced.

Volunteers

The estate is making use of volunteers, especially for larger events.

Focus on local suppliers

Yes

Selling channels

Visitors to the park and the castle but their tickets at the entrance of the estate.

The website plays an important role in as well attracting visitors as in renting the houses.

Agricultural and forestry products follow traditional selling channels.

Key partners

- Building companies specialized in the restoration of heritage houses.
- Producers of agricultural equipment and materials
- Forestry related companies

- Gardeners

Communication

Newspaper – Magazine – Radio – Television – Online – Directories – Social media

Marketing through own website, magazines and newspaper articles. Television and radio are also regularly used marketing instruments. Social media are playing a growing role in promoting the estate.

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☒ Limited geographical reach
- ☒ Lack of digital tools
- ☒ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Product leadership

The estate uses a mix of business strategies: operational excellence for agriculture and forestry, customer intimacy for the renting of the houses and a product leadership strategy for activities directly related to the heritage house.

Innovation

Anchorage of/in local community/economy

The estate is an important local employer.

Service-oriented

A personal link with people renting the houses of the estate. Where possible people get even involved in the overall activities of the estate.

Multifunctionality

With a combination of agriculture, forestry, renting houses, and a multitude of activities related to the house and the park multifunctionality is a real strength of the estate.

11. Flanderhof

Romania

Location:

Strada principala 175, Daia, comuna Roşia, Jud Sibiu, Romania (45° 48' 4" N, 24° 17' 6" E)

Located in the countryside

<https://www.transylvanian-heritage-housing.eu>



General description

Flanderhof is built around 1720. The estate includes the house and extensive gardens, home to 280 different species including 60 different species of roses. Located at 8 km from Sibiu/hermannstadt, one of Romania's most vibrant cultural hubs, the estate offers a blend of history, natural biodiversity in the contemporary environment of a revitalized estate. The owner shares his passion for art and neuroscience by organizing multiple events on art, music and neuroscience. But individual visitors or groups are welcome as well. They can rent one of the houses or one of the meeting rooms within the estate including the music room, the orangerie, the tower and the courtyard. Companies and organisations are welcome as well and can organize colloquia, special events, conferences, ... The houses on the estate are fully renovated and contain a fully equipped kitchen.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	Total land area				

Land use

The estate includes a large garden containing 280 different plant species including 60 different species of roses.

Investments

Main investments are directly related to the restoration and the maintenance of the heritage house.

Access

Access only for visitors to the estate.

Number of visitors

+/- 1.000

Type of visitors

The estate is attracting national and international visitors whose visit includes at least one overnight stay. Often an overnight stay is linked to the participation in one of the many events, congresses, colloquia and courses organized.

Average spending

50-250 €

Activities

Commercial activities

- Rooms and houses for rent
- Bed & Breakfast
- Meetings
- On demand tours
- Discovery trips

Education, research, community or environmental activities

- Nature hikes, hunting
- conferences, meetings, colloquia on neuroscience

Cultural or leisure

- conferences, meetings on art and music

Products

None

Turnover

A large part of the income is generated by the renting of rooms and houses. The occupancy of the houses and the rooms is positively influenced by the organization of several colloquia, and courses.

Price differentiation

Rooms are rented by the day, the houses by the week. Prices are differentiated in function of the accommodation chosen.

Employment

Limited employment in function of the maintenance of the property (rooms, houses and garden).

Volunteers

The estate is not making use of volunteers.

Focus on local suppliers

Yes

Selling channels

Renting of rooms and houses directly with the owner.

Key partners

- Cultural organisations and institutions.
- Scientific organisations and institutions including universities.

Communication

Online

The website is the main marketing tool.

SWOT

Strengths

- ☐ Property includes land
- ☒ Long term strategic planning
- ☐ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☒ Limited geographical reach
- ☒ Lack of digital tools
- ☒ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Customer intimacy

Visitors are getting a very personal service and have direct contact with the owners. Courses and events organized by the owners bring together likeminded people who are often returning visitors to the estate. A customer intimacy strategy is chosen to attract visitors to the heritage house.

Innovation

Focus on uniqueness and story-telling

Story telling is an important marketing instrument. The story-telling not only relates to the heritage house but also to the expertise of the owner in the field of art, music and neuroscience.

Service-oriented

Main focus of the business strategy is delivering an exceptional service to clients. This becomes clear in the personalized service to each of the visitors. Service oriented is combined with high quality lodging.

12. Bran Castle

Romania

Location:

Str. General Traian Mosoiu, nr. 24, Bran, Romania

Located in a village

<http://www.bran-castle.com>



General description

Bran Fortress was built in 1377 both for strategic and economic reasons. Its purpose was to intercept the road that leads to Transylvania, including the gorge, and to ensure the protection of the Magyar customs centre. All the military conflicts that took place at the Bran Gorge were regional military confrontations, which were secondary in importance, and therefore involved only moderate use of military power. This explains the survival of the castle over a period of many centuries during which the castle was changing ownership regularly.

After 1918, Transylvania became part of Greater Romania. On December 1st 1920, the citizens of Braşov, through a unanimous decision of the city's council, offered the castle to Queen Marie of Romania. The Castle became a favourite residence of Queen Maria, who restored and arranged it to be used as a residence of the royal family.

Queen Marie's daughter Princess Ileana inherited the castle. In 1947, Princess Ileana, together with her husband and children, would leave Romania, leaving Bran Castle to the Romanian State's stewardship. During the communist regime, part of the Castle's furnishings and royal objects were dispersed. When the queen died, 2164 royal objects were inventoried. In 1957, ten years after the beginning of the communist regime, Bran Castle became a museum. In 1993 the castle's restoration works, which had started in 1987, were finished. The Castle was reopened as a museum and was reintroduced into the tourist circuit. On May 18 2006, after several years of legal proceedings, the castle was legally returned to the heirs of Princess Ileana of Romania and Archduke Anton of Austria. However, the Romanian Government, through the Ministry of Culture, provisionally administered the castle for another three years. In 2009 the Castle fully re-entered the possession of its legal heirs.

Bram Stoker's character, Dracula, is a Transylvanian Count with a castle located high above a valley perched on a rock with a flowing river below in the Principality of Transylvania. Bram Stoker never visited Romania. He depicted the imaginary Dracula's castle based upon a description of Bran Castle that was available to him in turn-of-the-century Britain. Indeed, the imaginary depiction of Dracula's Castle from the etching in the first edition of "Dracula" is strikingly similar to Bran Castle and no other in all of Romania. Since then the castle has become Count Dracula's home in Transylvania and attracts millions of tourists every year.

Size

Floor area heritage house					
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
	Total land area				

Land use

The estate includes the castle with its immediate surroundings (limited surface). The immediate surroundings were used to build tourist infrastructure: entrance, restaurant, ...

Investments

Principal investments made are related to the restoration of the castle in the development of touristic infrastructure to welcome visitors to the castle, including a restaurant.

Access

Paid access for visitors throughout the year.

Number of visitors

>50000

Type of visitors

The estate is attracting national and international visitors. Most of the tourists visit the castle due to its connection to 'Count Dracula'.

Average spending

10-50 €

Activities

Commercial activities

- Events: dinners, weddings, company events
- Private visits
- Film and photo shoots
- Restaurant
- Yearly events (e.g. Halloween)

Education, research, community or environmental activities

- Audioguide
- Guided tours
- Exhibitions related to the castle's history

Cultural or leisure

- Exhibitions related to the castle's history

Products

Tourist gadgets related to the castle and the Count Dracula story

Turnover

With 5 million visitors per year the entrance fees are the major source of income. Food, beverages and tourist gadgets complement the entrance fees.

Price differentiation

Entrance fees vary in function of the age. An additional fee is asked for the audioguide and for access to the exhibitions. When special events are organized the ticket price increases.

Employment

The estate is an important employer in the region. Most of the personal hired is directly linked to welcoming the 5 million visitors per year. Next to this maintenance personnel is an important source employment.

Volunteers

The estate is not making use of volunteers.

Focus on local suppliers

No

Selling channels

The estate is not making use of volunteers.

Key partners

- commercial national and international organizations active in the hospitality sector including travel agents
- food suppliers

Communication

Newspaper – Magazine – Radio – Television – Online – Social media – Leaflets – Billboards

Marketing on national and international level making use of all media including flyers, advertisement, television, radio, magazines, newspapers. The castle profits of international campaigns attracting tourists to Romania. In most of those campaigns the castle plays a lead role.

SWOT

Strengths

- ☐ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☐ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Operational excellence

With 5 million visitors per year operational excellence is the logic choice as a business strategy. The management takes all possible measures to limit the daily queues.

Innovation

Anchorage of/in local community/economy

The estate is an important local employer.

Focus on uniqueness and story-telling

The very rich history of the castle and its link to Bram Stokers' story on Count Dracula is the most important non-tangible value of the estate. Story-telling is at all levels of the visit an important aspect. Story-telling is also used as a differentiator of the entrance fees (audioguide, additional exhibitions, ...)

Use of digital tools

Reservations are directly with the estate. The estate's website has a very performant electronic ticketing system.

13. De Hoge Veluwe National Park

The Netherlands

Location:

Houtkampweg 9, 6731 AV Otterlo, The Netherlands

Located in the countryside

<https://www.hogeveluwe.nl>



General description

Technically this estate is not a family owned heritage house as we have defined it in this study. The estate belonged to one of the most striking couples in Dutch history: Anton and Helene Kröller-Müller. Anton built Müller & Co. one of the first multinationals worldwide. With shipping and ore trading as main activities, he gained a fortune. As a counterbalance to the hectic and busy business life, Anton was looking for peace in nature and especially in the Veluwe. It was also his love for nature, as well as for hunting, that made him decide to start his own estate: De Hoge Veluwe. From 1909 (the couple had lived in The Hague since 1900), he gradually started to purchase plots of land to them together. In 1917 he owned no less than 6,800 hectares. The Kröller-Müller family was the most important landowner in the Veluwe, with the exception of the royal family. After the estate was fenced, Anton had red deer, wild boar and mouflons set out for hunting. There were even kangaroos for some time.

The Dutch architect H.P. Berlage, who was already employed by the Kröllers at that time, designed the 'Jachthuis Sint Hubertus', a country retreat for the couple in the Park and the base for Antons hunting parties. The construction was completed in 1920.

Helene meanwhile, devoted herself almost entirely to her great love, modern art. In just under twenty years, Helene brought together an art collection of over 800 paintings, around 275 sculptures, around 5000 drawings and magazines, and nearly 500 crafts. Among the drawings and paintings were various works by Vincent van Gogh. Architect Henry van de Velde (1863–1957) was commissioned to design a large art museum.

An unprecedented economic crisis brought Anton's firm in problems. In April 1935, the Kröllers were forced to sell their Veluwe possessions to a newly established foundation: De Hoge Veluwe National Park Foundation. While being a private property, the Hoge Veluwe is no longer managed by the family. Nevertheless, we have included the estate as an illustrative case because it shows that with proper management a family owned estate can be very successful.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
Total land area					

Land use

The estate consists of 6000 ha nature. The park is home to an unprecedented diversity of plant and animal species. From the rare pearl butterfly to the impressive red deer, from the gentian blue to the little salsify. The Park has more than a hundred Red List species, such as the spout, the turn neck, the pile frog and the ring snake.

Investments

Principal investments made are related to the management of the habitats present, the infrastructure to welcome the visitors and the historical buildings. At the moment the park is building a new multifunctional building.

Access

Entrance fee

Number of visitors

>50000

Type of visitors

The estate is attracting national and international visitors. The international visitors often stay for at least one night.

Average spending

10-50 €

Activities

Commercial activities

- Entrance fee to the park and/or to the museum + guided tours
- Covered wagon ride through nature guide
- Restaurant, camping site
- Bikes for rent

Education, research, community or environmental activities

- Nature conservation, games and workshops
- Photography workshop, lectures
- Hunting

Cultural or leisure

- Hiking and biking
- Safari, bird watching, photography

- Events: concerts, sport events, markets

Products

Shop with products related to the national park.

Turnover

Most of the income is generated by the entrance fees to the park. The presence of the Kröller-Müller museum in the centre of the park attracts additional visitors as you cannot visit the Kröller-Müller museum without passing through the park. Bike rental and the restaurant provide additional income.

Price differentiation

Children have a discount on the entrance fee.

Employment

The national park employs 154 persons (good for 78 FTE). Most of the people are coming from the surrounding villages.

Volunteers

475 volunteers are supporting the park's activities.

Focus on local suppliers

Yes

Selling channels

The estate is selling its tickets directly to the visitors.

Key partners

- Tour operators
- food suppliers

Communication

Newspaper – Magazine – Radio – Television – Online – Directories – Social media – Leaflets

The national park is having its own communication and marketing department. The park is getting media attention in national and international press. Many newspapers and magazines get regular press releases on activities in the park. The National Park has a good maintained website and is regularly active on social media. A newsletter is sent regularly to those who subscribed to it.

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☒ Strong links with local community
- ☒ Unique properties
- ☒ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☐ Limited geographical reach
- ☐ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☐ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☐ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☐ Activities not known to the larger public

Business Strategy

Operational excellence

While the park is aiming for product leadership in its nature restoration activities the general business strategy of the park is operational excellence. With the large number of people visiting the park every year this is a logic choice.

Innovation

Anchorage of/in local community/economy

The estate is an important local employer.

Focus on uniqueness and story-telling

The history of the park linked to the Kröller-Müller family and the museum in the centre of the park is an important part of the story-telling. However, the unique nature values created in the park linked with many stories on the individual species and habitats is a never ending source of stories to entertain or to educate the visitors.

14. Elmley Estate

United Kingdom

Location:

Elmley National Nature Reserve, Elmley, Isle of Sheppey, Kent, ME12 3RW

A family owned heritage house in the country side

<https://www.elmleynaturereserve.co.uk>



General description

Elmley is a family-run farm with approximately 700 cattle grazing the pasture each year. It is this grazing marsh that provides such a special habitat for wildlife.

It is an internationally important site for the conservation of both habitat and plants, animals, insects and bird and so it is a SSSI, Special Protected Area for birds and Ramsar site (wetland of world importance). Elmley Estate has a huge number of rare and endangered species but Elmley is especially important for breeding wading birds and over-wintering birds – with records of lapwing chicks fledged into adults. In the winter months the sky can be filled with tens of thousands of wildfowl, which make an unforgettable sight of cloud-like murmurations and flocks in formation. Visitors can spend the night at Elmley which is offering different cottages and tiny houses in the middle of the nature reserve. The barn can be rented for weddings and events.

Size

Floor area heritage house	0-10 ha	10-50 ha	50-250 ha	250-1000 ha	>1000 ha
> 2500 m ²					
500-2500 m ²					
0-500 m ²					
Total land area					

Land use

Elmley is a 3,200 acre estate based on an island in the Thames, situated away from the bustle of North Kent, just an hour from London.

In 1991 Natural England designated Elmley a National Nature Reserve under Section 35 of the Wildlife and Countryside Act (1981) and we work closely with Natural England to ensure the conservation of Elmley's important habitats and to provide the opportunity for the public to experience and enjoy its special natural heritage.

Investments

Principal investments made are related to the restoration of the existing houses and barn. Several tiny houses were installed. Maintaining the nature reserve is however a very intensive task.

Access

An entrance fee is asked. Additional fees if you want to stay in the nature reserve or if you want to organize an event.

Number of visitors

5001-50000

Type of visitors

The estate is attracting especially local and national visitors who visit the estate for a day.

Average spending

0-10 €

Activities

Commercial activities

- Agriculture
- Entrance fee per car
- Houses for rent
- Tiny houses for rent
- Weddings
- Events

Education, research, community or environmental activities

- National Nature Reserve under Section 35 of the Wildlife and Countryside Act (1981)
- Very successful breeding ground for lapwings

Cultural or leisure

- Hiking

Products

Not applicable

Turnover

A large part of the income is generated by the agricultural activities. As the owners want to invest systematically more in nature conservation alternatives are found in renting of cottages and tiny houses and in the organisation of weddings and events.

Price differentiation

None

Employment

The estate is run by the owners with assistance from a few locals.

Volunteers

The estate is making use of volunteers.

Focus on local suppliers

Food is locally sourced.

Selling channels

Entrance fees are paid directly to the estate.

Key partners

- Natural England (nature conservation NGO)
- researchers

Communication

Newspaper – Magazine – Online – Leaflets

The website and flyers are the main communication tools. Several newspapers and magazines regularly write about Elmley Estate

SWOT

Strengths

- ☒ Property includes land
- ☒ Long term strategic planning
- ☐ Strong links with local community
- ☒ Unique properties
- ☐ Local jobs
- ☒ The story behind

Weaknesses

- ☐ Lack of business management knowledge
- ☐ Limited financial resources
- ☒ Limited geographical reach
- ☒ Lack of digital tools
- ☐ Habitation versus commercial activities

Opportunities

- ☒ Digital tools
- ☐ New funding sources
- ☒ Networking with other heritage houses
- ☒ Increasing interest from the public

Threats

- ☒ Regulation
- ☐ Decrease of public funding
- ☐ Access to public funding
- ☒ Increasing maintenance cost
- ☐ Generation gap
- ☒ Activities not known to the larger public

Business Strategy

Customer intimacy

Product leadership in the field of nature conservation on private land, while customer intimacy is the business strategy for the supporting activities.

Innovation

Focus on uniqueness and story-telling

Successes and failures of nature conservation are excellent stories to attract people to the nature reserve. The passionate way the owners are speaking about the lapwing populations present is a reason in itself to visit the estate.

Sustainability

Sustainability is at the heart of Elmley Estate. The farm is off-grid and is powered by a very efficient solar array and generator with big batteries. The huts are handcrafted using natural materials and eco-friendly insulation.