A SURVEY ON THE TOURISM IMPACTS OF THE FISHING ON ORFŰ FESTIVAL

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Abstract: Fishing On Orfű (FOO) festival started as a funny jamboree in 2008, and is going to be organised for the twelfth time in 2018. The event that develops year after year in content has reached the limits of its growth regarding the number of visitors and the tickets sold out in the last three years. The festival is held yearly in June and determines to a large extent the tourism sector of Orfű, also impacts to some extent the tourism of the neighbouring settlements. A questionnaire survey using a sample of more than 1,000 respondents was carried out in the June of 2015. The findings of the research concerning visitors of the FOO have already been published formerly. In this paper the focus is on the tourism impacts of the event where visitors are mainly yuppies coming from Pest (33.9%) and Baranya (24.2%) counties. Only one-third of the visitors attended the event for the first time and 54% of them declared their intent to return to the venue beyond the duration of the festival. The tourism of Orfű is significantly expanding and mostly based on the festival, nevertheless it became more vulnerable since tourism turnover reduced in other months than June when FOO is organized every year. However, 80% of tourists have been agreed that the good location contributes to the success of the festival, the event also able to significantly improve the reputation of Orfű and to shape its image. One of the foremost tasks of the destination is to reach festival participants with modern marketing tools in other periods of the year to increase the number of returning visitors and spill-over effect of the tourism economy based on the positive image of the settlement.

1 The research was conducted with the contribution of the students of the Illyés Gyula Special College of the University of Pécs.
1. INTRODUCTION

Cultural tourism is a major element of international tourism consumption as it has recently been re-affirmed by the UNWTO, accounting for over 39% of tourism arrivals (Richards 2018). A survey among 44% of the UNWTO countries showed that cultural tourism has also a specific role in tourism policies and in country marketing and promotional plans. Cultural tourism demand is viewed as having grown in the past five years and is also expected to grow in the next five years. Therefore, the role of local communities as part of the cultural tourism experience has expanded dramatically. The tourists themselves have also become co-creators of their own experiences. (World Tourism Organization 2018). A plenty of studies have proved in the recent decades that cultural tourism is one of the most dynamically developing areas in the Hungarian tourism sector and that more than 90% of tourists travelling within Hungary had cultural tourism as their primary goal or as an auxiliary motivation (Rátz 2008). Festival tourism is part of cultural tourism, as underlined by the comprehensive research on cultural tourism conducted in 2004 by UNWTO and European Travel Commission, the organisation aggregating the international tourism authorities (Sulyok 2005). Festivals are a public themed celebration, which can act as a catalyst for demonstrating community values and culture, becoming tourist attraction in their own right (Jepson et al. 2008). According to the definition by the Hungarian Festival Association “festivals are all those series of cultural, arts, gastronomy, sport or other events – organised around one theme or more, regularly held in one location or more with a preliminarily announced programme – whose aim is to give the audience high standard, value mediating quality community leisure time experience that enlarges their knowledge and also offers entertainment” (Sulyok-Sziva 2009). The mediation of cultural, arts or gastronomy values by festivals is especially important in the preservation of the rural areas and their traditions, sensitive natural, cultural, or social environments (Jepson et al. 2008).

The growing popularity of festivals and the masses of people visiting festivals is a phenomenon that appeared in the last decades. The implications of this increasing competition is that festivals require to differentiate and position themselves within nice market to focus on its specific target groups and its specific needs. The 2009 Eurobarometer survey of the European Commission defines the visit of festivals as a travel motivation on its own. In this survey, 5% of European travellers specified festivals as the primary motivation when choosing travel destinations. Interest in festivals by the population of the Central European countries is above the European average: the percentages measured in the survey in Hungary, Slovakia and Romania were 8.3%, 7.6%, and 7.3%, respectively (Sulyok-Sziva 2009). According to a survey of the Hungarian population, 12.5% of respondents were sure that they would visit at least one festival during the coming year (M.Á.S.T. Kft. 2007).

The above study confirms that festivals can be used as a gateway to attract visitors (Felsenstein – Fleischer 2003). What is the secret of a successful festival? The creation of
the right proportion of education, entertainment, escapism, and esthetics are key factors of festival success based on Pine and Gilmore’s (1999) 4E functional model. It should be supplemented with the experience itself, providing the 5E theory of Rivera et al. (2015). Aesthetic experiences are defined as festival attendees’ overall evaluation of the festival’s physical environment, education experiences are reached when festival attendees feel that their knowledge and skills improved through festival participation. Escapism is festival attendees’ desire to engage in different experiential contexts that are unlike their daily lives. Entertainment experiences are those that occur at festivals where people observe the activities and performances of others (Manthiou et al. 2014). Thus, experience elements are both tangible (e.g. food, drink) and intangible (e.g. atmosphere, another persons’ behaviour). The total festival experience consists of the festival’s core product that is performed at ‘stage(s)’, available services as well as factors like other people, safety and environment that exist at the moment of the consumption (Tangit et al. 2016, Kinnunen 2018).

The positive festival experience is clearly reflected with the high rate of repeat attendees. Increased loyalty and the continuity of each festival’s layout, organisation and concessions affects the nature of the on-site atmosphere, might create a garden party nature with time. The feeling of security and safety adds to a sense of belonging, as do the presence of so many familiar faces from previous years (Anderton 2006). If consumers feel a kind of connectedness with other consumers, which is a sign of a strong level of psychological sense of a brand community, the chance of re-attending the event in the future is higher (Kazár 2019). Such audience loyalty is crucial to the continued longevity and survival of many events. However, the construction of relatively stable place- and event-images is highly complex. Nevertheless, when a festivals atmosphere is relatively stable, the openness to the possibility of change is necessary for an event to avoid stagnation and to continue to attract new attendees. Rejuvenation needs enormous effort and expenditure in attracting new attendees each year, with the use of new technologies, organizational, operational and structural innovation (Anderton 2006, Jászberényi et al. 2017).

Festivals can be classified in many ways. Hunyadi et al (2006), based on the questioning of festival organisers and other experts, distinguished 35 categories, the largest segment of which was the category of classical music festivals. Later Smith (2009) defined nine categories on the ground of their topics: carnivals, arts festivals, music festivals, gastronomy and wine festivals, religious festivals, circuses, sport events, mega-events and large-scale cultural events. Festivals can also be categorised, besides their topics, by function, genre, popularity, catchment area, motivation level, duration, type of organizers, target group, sustainability, life cycle curve (Kundi 2012a, Jászberényi et al. 2017). Consequently, we can distinguish events of primary motivation and ones of only secondary motivation, offering auxiliary programmes. On the ground of their catchment areas, events attracting visitors from a distance over 60 kilometres can be called tourist events and not local ones.
Festivals enriched with cultural programmes, high standard events make a considerable contribution to the creation of an attractive and unique image of their respective locations and to the increase of the tourist attraction of the destination (Felsenstein – Fleischer 2003, Getz – Page 2016). “The image-shaping impact of festivals is undeniable, and a number of researches are also available on their economic impacts, typically focusing on one single festival (Sulyok – Sziva 2009).” Direct impacts are described in terms of aggregate change in income and employment attributable to the festival. In many case researches do not deal with the social welfare maximization or estimation of surplus derived by producers, consumers, or government resulting from the festival. The social impact assessment of some socio-cultural research on festivals demonstrated resident perceptions and attitudes towards festivals/events; the importance of brand communities, community identity and cohesion; disruption and loss of privacy; crime and accidents; social and cultural capital; enhancing community capacity; and social demonstration effect (Jepson – Clarke 2016, Kazár 2019). Instead, impact assessments usually concern short-term impacts and direct, tangible outcomes such as extra jobs, hotel rooms, and business revenues (Webster – McKay 2016). Nonmarket effects may have to be considered, especially in relation to locations that are looking toward events as a tool for destination marketing and image (re)creation (Felsenstein – Fleischer 2003, Kuusik et al. 2014, Duarte et al 2018).

Local and national governments use festivals to celebrate historic events; increase civic pride and to aid in community regeneration projects; to inspire or revitalise local arts scenes; to boost tourist numbers in specific locations; to extend tourist season geographically and temporally; and to stimulate local and regional economic growth (Getz 1991, Bowdin et al. 2001, Jászberényi et al. 2017). Policy measures may be needed to increase the magnitude of local growth. Encouraging local suppliers and contractors to bid for festival-related contracts or adopting a “claw-back” clause would be one way of increasing local expenditure and subsequently local economic growth over persuading festival contingent on a minimal level of festival contracts going to local producers (Felsenstein – Fleischer 2003).

This paper is also an analysis of one festival, the event called Fishing on Orfu (hereinafter: FOO) that was organised for the tenth time in 2018. In our opinion this festival, besides improving the general image of the settlement, also has considerable impacts on the economy of the village and other sectors of the tourism. The success of the event called FOO and its unbroken popularity for nine years is a proof for the above-average popularity of festivals for the Hungarian population, also the fact that Orfu managed to find a segment of the touristic demand for which this festival is an attractive form of having experiences and satisfying their cultural needs.
2. TOURISM STUDIES ON POPULAR MUSIC FESTIVALS IN HUNGARY AND EUROPE

A Europe-wide overview of music festivals was carried out by Négrier et al. (2013) with a comparison of 390 events from 10 countries. The number of music festivals has flourished during the last decades not only in Hungary but among others in Finland, France, Germany, Italy (Patterson – Pegg 2010, Schabbing – Steffen 2012, Négrier et al. 2013). For instance, music festivals are the most popular type of festival in Romania (Mahika et al. 2015). Nevertheless, the economic crisis has had dramatic impact on music festivals, differently in each country. Resulting a decrease in their subsidy mostly in Ireland and Spain and in contrary an increase in Finland and Belgium regardless of the public policy model adopted by each country for festival financing.

The life and activity of a nowadays music festival is not limited only to its concert list. Indeed, off-season activities are typical by 53% of the festivals, mostly with events more than 10 seasons behind are more and more present. The purpose of such activity is to maintain a connection with a festival’s audience and the local population, building brand communities (Kazár 2019), broadening the public’s knowledge base or supporting musical composition and the training of musicians, to create links with local educational partners. This activity seeks to promote the festival brand over a longer period of time, thereby creating value. These parallel activities modify the image of a festival as confined to a time and a place creating participatory moments both before and after its more public season. Off-season activities are mainly related to Jazz/blues and Pop/rock festivals comprised by the following elements: holding concerts (34%), offering learning opportunities (17%), holding conferences (11%) and master classes (10%), and sponsoring artist residencies (10%) exhibitions, cultural projects, voyages, and competitions (Négrier et al. 2013).

In general, artistic objective is the main mission of music festivals to respect the artistic world and their audience, also reflecting a constant need to develop their program to remain competitive. This strategy is also verified by Kazár’s (2019) brand community investigation, which demonstrates, that satisfaction with the artists plays a crucial role to reach overall satisfaction. Following the cultural objective (to make culture more accessible), third time the local development was addressed by the festival organizers as one of the main objectives. It highlights the importance of their local socio-economic environment and the image of a region or even its identity or its economic recovery. Some festivals in Europe look to stimulate job growth, commerce and charity work in order to benefit local residents as a specific objective (Négrier et al. 2013). In some cases, the local economic benefits brought by festivals are seen as compensation for the possible nuisances they create (noise pollution, a massive influx of festival-goers, road congestion, etc.). These negative environmental impacts, sustainable ways of music festival organization and the importance of the environmentally responsible behaviour of attendees was already
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The most famous Hungarian music festivals (Table 1) attract a large number of visitors, but events with more modest number of the audience can also have a significant impact on the economy and recognition of their respective settlements. The event with longest traditions among the major music festivals is the Szeged Youth Days (Szegedi Ifjúsági Napok, SZIN), and several events have gained international recognition at the European Festival Award in the recent decade.

Table 1: Numbers of visitors and recognitions of the Hungarian music festivals

<table>
<thead>
<tr>
<th>Festival</th>
<th>Year of foundation</th>
<th>Location</th>
<th>Number of visitors (year)</th>
<th>Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>SZIN</td>
<td>1967-, then 2003-</td>
<td>Szeged</td>
<td>100,000 (2018)</td>
<td>2011 Green Festival Award; 2009 Greener Festival Award</td>
</tr>
<tr>
<td>Rockmaraton</td>
<td>1990-</td>
<td>Dunaújváros (prior: Szekszárd and Pécs)</td>
<td>35,000 (2015)</td>
<td></td>
</tr>
<tr>
<td>VOLT Festival</td>
<td>1993-</td>
<td>Sopron</td>
<td>152,000 (2018)</td>
<td></td>
</tr>
<tr>
<td>FEZEN</td>
<td>1996-</td>
<td>Székesfehérvár</td>
<td>40,000 (2016)</td>
<td></td>
</tr>
<tr>
<td>Hegyalja Festival</td>
<td>1999-2013</td>
<td>Tokaj-Rakamaz</td>
<td>80,000 (2013)</td>
<td>Last time in 2013</td>
</tr>
</tbody>
</table>
The first comprehensive study concerning the festivals in Hungary was made by NKA (Nemzeti Kulturális Alap, National Cultural Fund of Hungary) in 2004, with the findings of the interviews made with 230 festival organisers were published in 2006 (Hunyadi et al. 2006). On the assignment of the Hungarian Tourism Inc. another study was made on the festival visiting habits of the Hungarian population two years later, in December 2006: it was a questionnaire survey of a sample consisting of 1,000 respondents, representative in gender, age and settlement type (M.Á.S.T. 2007). The survey of the social and cultural impacts of festivals is a rather complex endeavour (Kundi 2012b). The periodical called Turizmus Bulletin devoted a whole publication to the issue of festivals in 2009. This included, amongs, the dissemination of the findings of another survey analysing the festival visiting habits of the generation aged 15-25 (Sija-Sauerermann 2009). The findings revealed that 56% of the younger generation had already participated in some festival and 22.1% of them were regular visitors to such events. Sziget Festival was familiar to 92% of all respondents, but the recognition of VOLT, Balaton Sound and Hegyalja Festival were also considerable (85.7%, 78.2% and 71.4%, respectively). The next

<table>
<thead>
<tr>
<th>Festival Name</th>
<th>Year(s)</th>
<th>Location</th>
<th>Attendance (Year)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Festival</td>
<td>2002-</td>
<td>Debrecen</td>
<td>108,000 (2018)</td>
<td></td>
</tr>
<tr>
<td>Veszprémfest</td>
<td>2004-</td>
<td>Veszprém</td>
<td>28,000 (2016)</td>
<td></td>
</tr>
<tr>
<td>Balaton Sound</td>
<td>2007-</td>
<td>Zamárdi</td>
<td>165,000 (2018)</td>
<td>2012 Best middle sized festival - European Festival Awards</td>
</tr>
<tr>
<td>Fishing on Orfű</td>
<td>2008</td>
<td>Orfű</td>
<td>31,500 (2015)</td>
<td></td>
</tr>
<tr>
<td>Lake Festival Bánk</td>
<td>2009</td>
<td>Bánk</td>
<td>3,500 (2016)</td>
<td></td>
</tr>
<tr>
<td>B.my.Lake</td>
<td>2012</td>
<td>Keszthely (until 2016 in Zamárdi)</td>
<td>no data</td>
<td>2013 Europe’s best new festival - European Festival Awards</td>
</tr>
</tbody>
</table>

Source: edited by Oroszi, V. Gy.
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festival in the order, EFOTT was only known by 41.8% of respondents (but 83.3% of those with diplomas), Rockmaraton was familiar to 29% and SZIN to 22.3%.

Of all Hungarian popular music festivals, Sziget, VOLT and Balaton Sound (Indra 2009), and also the Debrecen based Campus Festival (Bácsné Bába 2014) have been thoroughly examined so far from a tourism aspect. The following paragraphs are a summary of the findings of these surveys, to make them comparable with the findings of our own research.

Beyond doubt, the most visited of all Hungarian music festivals is Sziget Festival (breaking yet another record in 2018, with 565 thousand participants in the event), which in 2012 and also two years later was awarded the best large-scale festival in Europe (Festival Awards Europe). The number of male and female visitors to Sziget festival in 2008-2009 was by and large the same (as regards foreign visitors, males were the majority). Most of them were in the 20-24 years generation (32.6%), but the average of those aged 25-29 was also high (19.9%) – so half of all visitors were young people in their twenties. Of all visitors from Hungary, approximately 73% came from Budapest and the region of Central Hungary. The proportion of visitors arriving on their own is definitely low; the most typical size of the groups of festival visitors is 2-5 persons. The average of those with higher education qualification in 2008 and 2009 was 49% and 58%, respectively. The extension of the festival visit is not typical for 84.5% of visitors. Longer durations of stay by domestic visitors is typically motivated by visiting friends and relatives and further entertainment possibilities, not inspired by touristic reasons. City sightseeing (26%), visiting a spa (12%) or a museum (8%) are quite rare. Foreign guests spend a much longer time in the capital city of Hungary beyond the festival and their goals are not identical with those of the Hungarian guests. It was mainly people arriving from more distant areas that participated in extra-Sziget programmes, and they inquired about these on the Internet, the programme booklet of the festival and the information tent. The main source of information about popular music festivals, their dates and programmes is the many years of tradition for every third visitor, every fourth guest heard about them by word of mouth and every fifth on the Internet. The choice of the respective festivals is mostly determined by the artists performing, their shows, and the mood of the event and the social experience (Kovács 2009a, Kovács 2009b).

Balaton Sound has been organised since 2007 and it attracted 145,000 visitors in 2015. Its target audience is the generation aged 20-24, with slight over-representation of males. Of all visitors, 64% had higher education qualification. Most of them arrived at the event from Budapest (40.3%) and Pest County (11.7%), the proportion of foreign citizens was 10% in 2008. Two-thirds of them travelled to Zamárdi only to participate in the festival. Half of the tourists, however, extended their stays either before or after the event. In 2008 a total of spending worth HUF 1.58 billion was estimated in relation to the festival, 27.2% of which was spent on entrance tickets, 34.5% on the consumption of food and drinks. The average spending per person was HUF 41,000. The local tourism tax revenues generated by the festival may have reached HUF 18 million in Zamárdi, while the demand
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for extra labour generated an amount of salaries worth HUF 460 million during the four days of the event (Indra 2009).

The 2008 VOLT Festival in Sopron was attended by much more visitors from Budapest (30.1%) than from Győr-Moson-Sopron county (23.5%), and the third largest area of origin was Pest county (8%), succeeding the counties surrounding Győr-Moson-Sopron. The proportion of local inhabitants was only 14%. The average age of the visitors was 22.9 years. Most of them were students (50%) but 45% already had higher education diploma. The programme generated a total spending of HUF 1.28 billion, of which 31.4% was spent on foods and drinks and 26.8% on entrance tickets. The area received tourism tax revenue worth HUF 14 million, and another HUF 380 million was spent on extra labour demand (Indra 2009).

The average age of visitors to Campus Festival in the years from 2010 to 2013 was 21-25 years. Of the four years of the survey, in three years it was women (52%, 55% and 58%, respectively), in one year it was men (53%) who were slightly over-represented. The proportion of university and college students ranged between 23% and 42%. The main area of origin to the programme held in Debrecen is Hajdú-Bihar county (57-69%). A significant share of visitors (55%) did not participate in any other festival in 2013. The primary motivation indicated was the supply of music for the overwhelming majority (95%). The breakdown of the sources of information has changed in the recent years. The role of Internet as a source of information has increased, to the detriment of information from word of mouth. Most typically it is social media that is used by visitors for getting information, but the webpage of the festival is also frequently used. Most of the expenses are covered by the participants themselves (52-58%), but support from the parents is also significant, although declining in proportion in the recent years (from 30% to 20%). The average amount spent during the four days of the event continuously decreased from 2011 to 2013 (from HUF 20,298 to 16,276). Meanwhile the prices of the tickets remained by and large the same (Bácsné Bába 2014).

3. RESEARCH METHODOLOGY

During this research we used the survey method, a methodology commonly used in empirical social researches, which method allowed the collection of quantitative information. We tried to keep the extension of the questionnaire within a reasonable limit so that it should be simple and obvious both for the volunteers contributing as questioners (students of the Ilyés Gyula Faculty of the University of Pécs2) and for respondents. The questionnaire has mostly closed questions, within that primarily selective question, which allowed us to measure quantifiable data – such as the survey of willingness to spend.

2 The present name of the Faculty is Faculty of Cultural Sciences, Education and Regional Development.
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During data recording we frequently used indices and scale type questions to get to know the subjective opinions and attitudes of the target group. The questionnaire seeks answers to many questions that had not been discussed in previous surveys or had been insufficiently discussed. The standard questions and the responses recorded in a single method allow quantifiable aggregation of the information and its statistical analysis. The total of 39 questions was related to 18 topics. The responses given to them allowed the making of a comprehensive analysis of the guests of the FOO festival and the touristic and economic impacts of the event. Some of these are demonstrated in this study. During the survey a total of 1,048 questionnaires were filled out, of which 998 proved to be assessable. Due to our preliminary hypothesis, a heterogeneous group of guests participated in the four days of the festival. This was based on the qualitative observations done in the previous years and the information concerning consumption, gained from catering facility managers. To verify this hypothesis, we collected and analysed questionnaires separately. The daily breakdown of questionnaires evaluated is as follows: Wednesday 211, Thursday 272, Friday 254 and Saturday 255.

After the analysis of the daily evaluations we could immediately see that our hypothesis was not verified and there were no significant differences among the spending of the visitors on the respective days. So, we made aggregate indices from the analysis of the four days and this makes the basis of this paper. This was supplemented by data published by the Central Statistical Office and received from the municipal self-government of Orfű. Quantitative surveys were controlled and supplemented by qualitative observations, and interviews made with the leaders of the municipality and the dominant persons of the local tourism sector. During the survey we also found it important to measure the attractivity of the festival, as the catchment area of the respective cultural attraction is significant. In Getz’s opinion those events are significant from a tourism perspective the catchment areas of which exceed 60 kilometres, and which generate at least one night spent in the respective destination (Getz 1991). Our survey justified the assumption that the FOO festival is an event also significant from this aspect.

4. TOURISM IN ORFŰ

Orfű is one of the dominant touristic destinations in South Transdanubia, competing for position three with Bikal as regards the number of guest nights spent at commercial and other accommodations, preceded by Pécs and Harkány.

The foundations of tourism are the natural values of the Mecsek Mountains, the four lakes created after the 1960s and the touristic infra- and suprastructure built around them. Following the dynamic development and excellent results in the 1980s and 1990s, the development of tourism in Orfű stopped at around the millennium, in fact, then even a decline started. In 2003 the Orfű Lake (the first of the lakes) was dredged, in 2007 the Pécs Lake (the second one) and a stable lake shore line was constructed at the latter lake, the
supported by tenderable resources (South Transdanubian Operational Programme), but the drought in that year and the limited water output of the stream supplying the reservoirs did not allow the restoration of the original water level, which resulted in a decay of shellfish and the beach could not operate, either, for technical reasons. Despite these negative phenomena, the volume of tourism in Orfű in 2007 was similar to the volumes of the previous years. The impacts of the problems became more serious in the years afterwards, possible exacerbated by the negative impacts on tourism of the economic crisis of 2008-2009. After the nadir in 2008, the fortunate co-existence of several positive factors gave tourism a new momentum and a new growth period has been experienced since then, as revealed by the volume of tourism in Orfű (Figure 1).

![Figure 1: Number of guest nights in Orfű in 2005-2015](image)

Source: edited by Oroszi, V. Gy., using HCSO data

The positions of a touristic destination are influenced by complex processes (Jónás-Berki et al. 2012). The most significant ones for Orfű are as follows:

- foundation and intensive activity of the Orfű Tourism Association (2008);
- the first TDM organisation of the region started its operation in Orfű (2010);
- renewed structure of touristic products, as an effect of support from the EU (Aquapark, Orfű-Pécs bicycle road etc.);
- new marketing strategy and marketing activity in practice;
- since 2008 the Fishing on Orfű Festival is organised every June, being a sold-out festival in the last three years.

All these promoted Orfű to become a distinguished touristic brand and allowed its image to continuously improve – and the latter is of decisive importance for a touristic destination (Spiegler 2009). The multiplier effects of the factors described above are
doubtless, they cannot be separated from each other. A more detailed analysis of the basic data of Transdanubia in Orfü, however, clearly highlights the importance of the festival. The number of commercial accommodations first decreased from fourteen in 2008 to eleven, but since 2012 a total of 12 facilities have been available for tourists. The total capacity of commercial accommodations is almost 1,800 beds. Regarding the number of private accommodations, there were approximately 190 in the years 2000-2005, which fell to 130 by 2010, to increase to 159 again in the recent years. Their capacity by now has reached the capacity typical of the years following the millennium, which is approximately 1,000 beds.

The annual turnover of guests has shown an upwards tendency since 2008. Apart from 2010, a year that was exceptional due to the reasons mentioned above, the turnover of guests at commercial accommodations increased until 2013 and then showed a slight decrease. Turnover of guests at private accommodations in 2011-2014 stagnated at around the double of the turnover typical of the years 2005-2007, and the year 2015 brought excellent results. The number of guest nights spent at private accommodations in Orfü in the 2005-2007 period was slightly over one-fifth of the turnover at commercial accommodations (20.1%–22.1% of that), while the same figure for the years 2012-2014 was one-third (30.3%–36.0%), and in 2015 almost half (44.2%). This shows a strengthening position of the private accommodations within the total of turnover of guests, nevertheless their significance compared to commercial accommodations is still lower (Figure 1).

Considering the changes of the monthly turnover of commercial accommodations it is clear that seasonality is strong in Orfü, with June (the month when the FOO festival is held) standing out from the other months. Of the total number of guests, 54.0% is registered in June, whereas the same proportion of all guest nights registered in June at commercial accommodations in 2015 was 59.9%. On the other hand, between 2004 and 2007, before the start of the FOO festival, the share of all guest nights spent in Orfü in June ranged between 15.8% and 16.8%, only. In 2015, the share of June from the total number of guests was even larger than those of the other two summer months: in this June the number of guests staying at the commercial accommodations in Orfü (9,026 persons) was almost two and a half times higher than the proportion of July and August combined (3,704 persons), while in 2007 the turnover in June was only one-third of the turnover of July and August combined. As regards the time of the year from November to March, it tells us everything that the number of guests at commercial accommodations remains below 150 in each month. Seasonality, anyway, is also well reflected by the number of accommodations operating: from May to September, in peak season there are 10-12 commercial accommodations available for guests, but only less than half of them operate in other times of the year.

Table 2: Number of guests in monthly breakdown (April to October) at commercial accommodations in Orfü compared to base year 2007
The year before the launch of the FOO, 2007 was taken as a base year and the monthly data of the turnover of guests were ordered into a table (Table 2). The growth in the number of guests is indicated by yellow colour, the doubling of their number by orange, the tripling of that by red colour. In case of decrease we applied light blue, deep blue and dark blue colours for the demonstration of the changes. It is visible that the numbers of guests typically decrease in the period from October to April\(^3\). In the spring and autumn months in several cases the number of guests fell to less than a half, in one case (October 2012) to less than a third. The largest fall in the number of guests can be seen in April and October, although the data of the latter months shows ups and downs. The only month that does not fit into the tendency of decrease is June: in this month the number of guests has continuously risen since 2009. This increase was less than a double in the first two years, over a double in 2011-2012 and the number of guests more than tripled in the least three years. Designing a linear trend line from the data of the guest nights in the 2004–2015 period we can see that the largest fall in the number of guest nights in Orfű occurred in August, followed by May and July. Putting the data on a graph makes the differences among the respective months, and the changes in the figures of the months over the last ten years plausible (Figure 2). It is worth looking at the outstanding performance of July in 2010, diverging from the general trend. It was due to the fact that after the organisation of the FOO festival in June another large-scale music festival, EFOTT (Egyetemisták és Főiskolások Országos Turisztikai Találkozója, National Touristic Meeting of University and College Students) took place in Orfű in this July. This event generated a turnover larger than FOO festival had in the respective year, and its impact on tourism can be compared to those of the sold-out FOO festivals of the recent years.

\(^3\)Note: in other parts of the year no exact data are displayed since 2009 in the database of HCSO, for data protection reasons, and so these months were not analysed
The year 2010 brought outstanding figures also as regards duration of stay both at commercial accommodation (3.6 nights) and in the category called “other” (formerly: private) accommodations (5.9 nights) (Table 3). Other accommodations used for business purposes realised a longer duration of stay (3.3-3.5 nights) than commercial accommodations did (2.7-3.3 nights), although only one-third of guest nights are registered in the “other” category. In other accommodations it is stagnation that is more typical after 2010, as they were unable to extend the average duration of stay of guests, 3.3-3.5 nights. At commercial accommodations the average duration of stay only approached the level of 2010 in 2013 (3.5 nights) and since then has shown a slight decline. Compared to the national average, however, these figures are definitely good. The average duration of stay of foreigners is 1.6-2.4 times more than that of the domestic guests. The duration of stay of foreign guest’s ranges from 5.3 to 7 nights, i.e. they spend almost a week in Orfű. For domestic guests it is more typical to spend 3-4 nights in Orfű, only, but their duration of stay is much more balanced than that of the foreign tourists (Table 3).
Table 3: Duration of stay by guests in Orfű, 2010–2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Duration of stay by foreigners</th>
<th>Duration of stay by domestic guests</th>
<th>Average duration of stay</th>
<th>Duration of stay by foreigners</th>
<th>Duration of stay by domestic guests</th>
<th>Average duration of stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>6.6</td>
<td>3.4</td>
<td>3.6</td>
<td>9.4</td>
<td>5.8</td>
<td>5.9</td>
</tr>
<tr>
<td>2011</td>
<td>5.7</td>
<td>2.4</td>
<td>2.7</td>
<td>6</td>
<td>3.3</td>
<td>3.5</td>
</tr>
<tr>
<td>2012</td>
<td>6</td>
<td>2.9</td>
<td>3.1</td>
<td>5.3</td>
<td>3.2</td>
<td>3.5</td>
</tr>
<tr>
<td>2013</td>
<td>5.9</td>
<td>3.3</td>
<td>3.5</td>
<td>6.4</td>
<td>3.2</td>
<td>3.5</td>
</tr>
<tr>
<td>2014</td>
<td>7</td>
<td>3</td>
<td>3.2</td>
<td>5.4</td>
<td>3.1</td>
<td>3.4</td>
</tr>
<tr>
<td>2015</td>
<td>6.1</td>
<td>2.9</td>
<td>3</td>
<td>5.8</td>
<td>3.1</td>
<td>3.3</td>
</tr>
</tbody>
</table>

Source: edited by Máté, A., using HCSO data

Figure 3: average duration of stay by guests in Orfű, 2010–2015

Source: edited by Máté, A., using HCSO data
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The growth in the volume of tourism in Orfű in general is deceiving. After a more in-depth analysis it turns out that one single festival has such an impact on the growth of tourism. Most of the guest nights are realised at long weekends, only, and in all other times of the year the number of guests staying in the village has been decreasing for years at commercial accommodations, parallel to the stagnation of the annual turnover of guests at private accommodations. Also, a monthly breakdown of the figures would probably reveal considerable disparities (data in such a detailed breakdown, however, are not available for private accommodations). For the village of Orfű, the growing revenues from tourism and company tax resulted in direct economic benefits (Figure 4), but this is due in the largest part to the success of one single large-scale event and the growing tendency is only attributable to that festival. The tourism sector of Orfű is very vulnerable then, extremes are large. Should the FOO festival not be held, the tourism sector of Orfű would be in a difficult situation.

Figure 4: Revenues from local tourism tax in Orfű, 2006–2016
Source: HCSO, Orfű Tourism Association

When analysing the FOO festival we can say right away that in the development of tourism in Orfű and the strengthening of the immaculate touristic image of the village the FOO festival has played a dominant role.
5. RESEARCH FINDINGS

In another study we already demonstrated those findings of the questionnaire consisting of 18 topics and 39 questions that were related to the festival visitors and their preferences for accommodations (Gonda et al. 2015), this time we are focusing on the economic impacts of the festival in the first place. What we find important to mention also in this place is that the audience of the festival is highly skilled, most of them with higher education qualifications and they are typically in the 30 or 40 years age group.

As regards the willingness of the respondents to spend money, more than one-third of them spend an amount between HUF 5,000 and 10,000 every day, a slightly smaller share of them spend between HUF 3,000 and 5,000 daily (Figure 5). It is only 18% of the participants who can manage with an amount between HUF 1,000 and 3,000 every day during the festival, and only 5% of visitors are really thrifty who make fun from less than HUF 1,000 a day. The other extreme consists of the group of visitors spending between HUF 10,000–25,000 Ft every day (10 %), and the small segment who spend in excess of HUF 25,000 every day (2% of all visitors). To this we must add the money spent on the entrance ticket, of course.

![Figure 5: Daily spending of the participants in FOO festival, 2015](source: survey by the authors)

Two-thirds of the participants pay their expenses from their own salaries. A very large proportion (19.8%) of respondents receive support to have fun at the festival – due to the
A survey on the tourism impacts of the fishing on Orfű Festival

high share of young participants (28.8% of all visitors are younger than 22) --, while 10.4% of the festival makers had saved money so that they could have a good time on this day or on these few days. The proportion of those supported by their parents and having fun from their own money saved are practically the same with the proportion of those participants who are under 22 years. A negligible part of the visitors (1%) financed their participation from loans, while 2% of them used other financial sources.

We also asked a question concerning the other services that festival makers used. The replies to this question by and large demonstrate where their spending is realised, apart from paying for entrance ticket and accommodation (Figure 6). We have to remark, however, that 10% of festival visitors did not pay for their accommodations but stayed at their own homes or at friends and acquaintances or chose other solutions. Their responses revealed that the largest part of them (85.5%) used the buffets and other catering facilities located in the venue of the festival, half of the visitors (49.2%) also spent money in catering facilities outside the territory of the festival, but food stores were also visited (by 44.3%). Tobacco shops were used by approximately every sixth participant. A regards transportation, buses were most frequently used (17.6%), but every tenth participant also used taxi services. As regards tourism attractions, the Aquapark of Orfű and the beach of the lake were used by more or less the same proportions of visitors (9.8% and 8.8%, respectively), but only 2.8% of the participants rented water vessels. The complex of the Court of Furnaces and Local Museum, and the Mill Museum attracted relatively few visitors (6.7% and 3.9%, respectively). The heterogeneous “Off” programmes – beer tour to Magyarhertelend, Spritzer tour, wine or pálinka course, baking bread, cave tours, bicycle tours, horseback riding etc. -- were very popular also in 2015, the are usually fully booked in advance, accordingly 27.7% of respondents tried some of these programmes.

<table>
<thead>
<tr>
<th>Preferred services of the participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furnace yard and Local Museum</td>
</tr>
<tr>
<td>Fishing OFF programmes</td>
</tr>
<tr>
<td>Beach</td>
</tr>
<tr>
<td>Bus</td>
</tr>
<tr>
<td>Tobacco shop</td>
</tr>
<tr>
<td>Buffets and other catering facilities</td>
</tr>
<tr>
<td>Restaurants</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

Figure 6: Services preferred by participants in FOO festival, 2015

Source: survey by the authors
According to the data of the Hungarian Central Statistical Office, the gross accommodation fee revenues of the commercial accommodations in June 2015 made HUF 28.29 million in Orfű, their incomes from catering was HUF 10.38 million and they also made another HUF 1.3 million from other services. The total of these sums is HUF 40 million for a total of 30,166 guest nights, i.e. the average gross amount of money spent was only HUF 1,325 per guest night in this month, which seems rather low and can only be explained by the fact that more than half of the festival visitors stayed at the camping site in the territory of the festival and probably slept in tents. The price of the entrance ticket to the festival also includes the fee of sleeping in tents, those choosing this kind of accommodation only had to pay a small amount, HUF 1,000 as registration fee per tent.

When examining other reasons for the low revenues, we must mention the fact that the largest part of the turnover of the catering facilities is realised in the territory of the festival, by a large number of businesses, and their revenues were not included in the HCSO statistics concerning Orfű. Taking into consideration the data concerning the spending willingness of respondents and our personal experiences of the considerable turnover at catering facilities collected during the observations, we dare to say that a very significant part of the turnover was realised in the shadow economy.

Respondents could also evaluate their level of satisfaction with the price and value ratio of the services (Figures 7 and 8). They were most contend with the price of the (daily and four-day) entrance tickets to the festival (average: 4.36), where 55% of respondents were very satisfied and 28% were satisfied. It is just the major part of the event about which they believe that the price and value ratio is very good. In addition, it was Fishing OFF programmes and the prices of the souvenirs available within the territory of the festival with which visitors were most satisfied (average: 3.8).

![Figure 7: Level of satisfaction with services, 2015](image-url)
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Source: survey by the authors

The price/value ratio of most services were put by participants into the medium satisfied category (average: 3.49-3.61), i.e. they said that the prices of the buffets, catering facilities, drinks bought outside the festival area and souvenirs available inside the festival territory were affordable. The least that the respondents were satisfied with was the prices of taxis, buses and the price/value ratio of the beverages sold within the festival area (average: 3.3.1-3.34).

Summing it all up, the participants were satisfied with the entrance ticket prices of the festival but in the case of buffets, other catering facilities, beverages and souvenirs they thought that the price/value ratio of the service in the village were better than those of the supply of the festival.

We also examined the factors influencing the participants to choose the event called Fishing on Orfű (Figure 9). This revealed that they were not unequivocally happy with the price/value ratio, but this was not the number one factor when making travel decision. What they found much more important is that FOO creates an occasion and a mood that allows meeting with friends and acquaintances. These factors were actually more important than the artist performing and other programmes at the festival, though that was considered as the third most motivating factor. The fourth in the order of factors of influence was the venue of the festival. If we take the responses “it influenced me” and “it influenced me a large extent” as one single category, we can see that the choice of the Panoráma camping
site (80%) and the settlement, Orfű (almost 70%) makes a significant contribution to the success of the event. The least important factor influencing travel decision was the proximity of the residential place.

Figure 9: Factors impacting the choice of the FOO festival in 2015
Source: edited by Máté, A. using the survey by the authors

The success of the event can also be measured by the willingness to return. Almost three-quarters (70%) of respondents planned that they would surely return to the festival in the near future, i.e. the offer and mood of the FOO festival were attractive to them on the whole (Figure 10). This is reinforced by the fact that two-thirds of the respondents (68%) are recurring guests to the festival. A further one-quarter (24%) thought that they would probably return to the festival. All in all, 94% of respondents will probably visit the festival again and another 6% are uncertain about it. In summing it all up, the event can be taken as successful, as the proportion of those who definitely want to return is very high.
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Figure 10: Willingness of respondents to return to the FOO festival after 2015
Source: survey by the authors

Considering the visits in Orfű for other purposes excepting FOO festival, opinions were mixed (Figure 11). This may still encourage the organisers and developers of tourism in Orfű: one-third of respondents (31.6%) would surely return to Orfű irrespective of the festival, and another one-fifth (21.9%) believed that they would probably return to the village. This total of 54% is a clear indication of the fact that the FOO festival is a great promotion for the inclusion of new guests in the tourism of Orfű. One-third of respondents (29.8%) were uncertain when answering, so the proportion of those not yet really convinced by the attraction of Orfű is rather high. Only 16.7% of respondents think that they would not visit Orfű if it was not for the FOO festival.
Finally, the respondents qualified, by evaluating statements, the mutual impacts of the festival, the venue and the settlement (Figure 12). To make a realistic assessment we should see “I agree” and “I fully agree” as one category – if we do so we can see that the statement that most respondents (94%) agreed with was that the festival was a considerable contribution to the improvement of the recognition and popularity of Orfű. Also, almost 90% of them believed that FOO festival contributed to the development of Orfű as a touristic brand. Almost 80% of the respondents agreed with the statement that the venue (Panoráma Camping Site) and the village itself were significant factors contributing to the success of the festival. Almost 80% of respondents found the touristic image of Orfű immaculate, which is also promising for the development of the tourism sector of the village in the coming years. Overall, respondents said that the festival and the venue have mutually positive impacts on each other. We can say that Orfű as a tourism destination has developed a lot in the field of image building.
6. CONCLUSIONS

The Fishing on Orfü festival was organised for the eighth time in 2015, with approximately 31,500 participants. The almost fully sold out event attracts visitors mainly from Pest and Baranya counties, and from the municipalities of South Transdanubia, primarily guests older than 27 and with high qualifications. Besides them it is younger secondary school students and university students who make a significant proportion of all visitors. It is quite rare that elderly and young participants arrive together; it is more typical that they visit the event with their friends and partners. For only a third of the guests was 2015 the first occasion to participate in the FOO, i.e. the number of guests attached for a long time to the festival, its artists, programmes or its venue is significant. A very large proportion of respondents declared their intentions to return to the festival, and more than 50% of them will probably return to Orfü outside the FOO festival. Regarding their demand for accommodation we can see that they most typically stay at the venue of the festival, the Panoráma Camping Site, at commercial and other accommodations of Orfü, and in Pécs, with a preference for more affordable solutions. The analysis of the number of guests and guest nights demonstrate that tourism in Orfü is dynamically developing, mostly as an effect of the FOO festival, but it has also become more vulnerable: apart from the single month of June we can see no development in the number of guest nights, in fact, a decline
can be seen compared to the reference year (2007). The research findings also suggest that the festival is a significant contribution, in addition to the volume of tourism in Orfü, also to the improvement of the recognition and image of the village. Accordingly, it is an important task of the near future to reach the potential returners generated by the FOO festival and those interested in Orfü – an improved destination brand – by up-to-date marketing tools, so the increase of the volume of tourism should be started also in months other than June. From Hungarian popular music festivals analysed from touristic aspects – Campus, Sziget, Balaton Sound and VOLT festivals –, in our opinion it is the latter two with which our findings of the survey made in Fishing on Orfü festival in 2015 can be compared.

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