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Youth Festival Life Cycles and Their Impact on Accommodation Demand: The Case of Hungary

ABSTRACT

The study aims to analyse the developmental trajectories of Hungary's market-leading youth and university music festivals—the National Touristic Meeting of University and College Students (EFOTT), the Szegedi Youth Days (SZIN), and the Campus Festival (Campus)—as well as their impact on the tourist accommodation sectors of their respective host settlements (Sukoró, Szeged, and Debrecen). The applied methodology combines trend analysis based on secondary sources with a statistical examination of guest turnover data (number of guests and overnight stays) from the Hungarian Central Statistical Office (KSH) for the period 2021–2025. The primary finding of the research is that, although the investigated festivals—unlike major international events—demonstrated strong resilience and stable attendance figures following the COVID-19 pandemic, this success is hardly, if at all, reflected in accommodation turnover. The impact of festivals held in major cities on local accommodation is statistically insignificant, while the effect of EFOTT, held at Lake Velence, is primarily local and relatively modest in absolute terms, albeit with spillover effects on surrounding settlements.

Keywords: festival tourism, guest turnover, life cycle, university, youth

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INTRODUCTION

The primary target audience of popular music festivals consists of young adults and individuals in the 14–18 age group, who perceive participation primarily as a social event, a cultural experience, and a form of recreation (Robertson et al., 2015); for younger attendees, these events also serve as venues for socialisation and networking (Kinnunen et al., 2020; Quinn et al., 2025). Given their age, many are university students who view music festivals as a form of entertainment alongside their studies, often linked to their respective university towns.

In the Hungarian festival market, university and youth events were typically local or regional for a long time; however, following the turn of the millennium, several have evolved into attractions with national or international appeal. The expansion of the festival-goer base is due, on the one hand, to the increasing accessibility of higher education for a growing segment of youth, which has elevated university social life and entertainment to a new level (Bácsné Bába, 2014). On the other hand, festival management has adopted market-based operations—similar to those of leading Hungarian festivals (Sziget Festival, Balaton Sound, VOLT Festival)—while maintaining their specific profile as university and youth events.

Among numerous festivals, three have followed extraordinary developmental trajectories: the National Touristic Meeting of University and College Students (EFOTT) (Fenyves et al., 2019), the Szeged Youth Days (SZIN) (Süli & Martyin-Csamangó, 2017), and the Campus Festival in Debrecen (Bácsné Bába, 2014; Fenyves et al., 2020), which now each attract over 100,000 visitors annually. Due to these attendance figures, the latter two have become prominent mid-sized attractions at both domestic and international levels, functioning as significant tourism draws for their host settlements. While SZIN and Campus are tied to specific cities, EFOTT—the most significant event targeting university students—operated as a peripatetic (itinerant) festival from its founding in 1976 until it found a permanent home on the shores of Lake Velence in 2015. These events have essentially become flagship tourism programmes in their host settlements, owing to the volume of visitors mobilised, the resulting expenditures, and their multiplier effects.

The present research seeks to address a research gap, as domestic scholars have thus far paid limited attention to these expanded youth and university festivals. It is also noteworthy that no comparative analysis has yet been conducted regarding these festivals or their impact on the guest turnover of the host settlements; these three prominent representatives of the Hungarian festival market have mostly been analysed only in theses and dissertations.

Before defining the research objectives, it is necessary to clarify what is meant by “tourism impact” in this study. The tourism impacts of festivals can be interpreted across multiple dimensions: these may include the local effects of festival-goer spending, image and awareness effects, attractiveness as event tourism, and impacts on commercial accommodation turnover. Due to the nature of the available data, this study—beyond analysing numerical visitor data—focuses primarily on the latter: the impact on accommodation turnover, measured using monthly accommodation statistics derived

from the KSH/NTAK (Hungarian Central Statistical Office/National Tourism Data Reporting Center) databases. Consequently, the study's conclusions are valid exclusively within the dimension of accommodation impacts and cannot be extrapolated to the overall tourism or economic role of the festivals. Other impact dimensions—particularly consumption by local visitors, image building, or non-registered forms of accommodation—cannot be captured with the current methodology; therefore, the study does not make substantive findings regarding these aspects. Based on the above, the following research objectives have been formulated:

1. To examine the developmental trajectories and characteristics of EFOTT, SZIN, and the Campus Festival as tourism products;
2. To analyse the impact of these events on the tourism of their host destinations, primarily based on available accommodation data;
3. To investigate, using accommodation data as a basis, how these festivals influence the seasonality of tourism in the host destinations.

LITERATURE REVIEW

Categorization and Significance of the International Music Festival Market

Festival tourism is a defining form of international travel and leisure, distinguished by its diversity and various methods of classification. According to Davies (2020), festivals can be categorized into indoor and outdoor events, by organisational structure (public, private, and non-profit), and based on type, size, or attractiveness. Newbold and Jordan (2016) further distinguish between global, diasporic, and festivals with local cultural or religious roots. In some cases, unique festivals serve as flagships for their host settlements, attracting hundreds of thousands of visitors.

The scale of a festival is most fundamentally determined by attendance figures. Based on visitor numbers alone, popular music festivals are among the most sought-after types, with the largest events exceeding half a million attendees (e.g., Coachella, Tomorrowland, Sziget). These are internationally recognised events primarily frequented by foreign tourists. The second tier includes festivals attracting domestic and international audiences of approximately 100,000 to 200,000 (e.g., VOLT, EXIT) (Pavlukovic et al., 2020), followed by those of regional significance (e.g., Fishing on Orfű) (Oroszi et al., 2018), and finally, festivals of local importance, which possess negligible tourism appeal.

Festivals can also be categorized by venue: they may be hosted by capital cities (Budapest – Sziget), large cities (Antwerp – Tomorrowland), medium-sized cities (Sopron – VOLT), or even small towns (Zamárdi) and micro-regions (Varga et al., 2025a). Depending on the size of the settlement, festival visitors may play a cardinal role in shaping tourism accommodation indicators (Varga et al., 2024). During the summer season, waterfront music festivals are particularly popular, offering memorable experiences through programmes integrated into the natural environment (e.g., Montreux Jazz Festival, Balaton Sound, Fishing on Orfű, Bánkitó).

A further classification can be based on musical genre. There are complex events with mixed offerings, whose success stems from the simultaneous presence of various genres (Coachella, Glastonbury, Sziget), contrasted with niche festivals focusing on specific genres, such as electronic music (Tomorrowland, Balaton Sound), jazz (Montreux Jazz Festival), or rock (Rockmaraton).

The significance of popular music festivals lies in their ability to mobilise large crowds, contribute to a settlement's brand awareness and economic revenue, and serve as a travel motivation for youth. According to Pegg and Patterson (2010), the young audience of these festivals develops a long-term commitment to the host location. Consequently, festival studies have primarily examined economic (Paleo & Wijnberg, 2006), social (Bácsné Bába, 2014), and environmental impacts. However, analyses of visitor motivation (Dunne et al., 2023), satisfaction (Hinek & Papp-Váry, 2024; Varga et al., 2025b), technological shifts (Robertson et al., 2015), and sustainability (Ásványi & Jászberényi, 2017; Lőrincz et al., 2022; 2023), as well as sustainable urban development (Nagy-Szijártó & Szalmáné, 2023), are also frequent. Varga et al. (2025b) found that university graduates are generally more satisfied and demonstrate a higher demand for supplementary cultural programmes, allowing festivals with complex offerings to attract a more diverse visitor base.

At the beginning of the decade, the dynamic growth of festival tourism was halted by the pandemic, impacting the survival of the entire sector and leading to the collapse of numerous businesses (Kinnunen & Honkanen, 2021; Rothschild et al., 2020). This coincided with shifting trends in international musical tastes, which significantly influenced attendance at certain festivals (Nunes & Birdsall, 2021). During COVID-19, established festivals sought opportunities for a comeback, which most achieved; thus, festival tourism remains a cornerstone of international tourism (Drummond, 2022; Su et al., 2024). Research by the latter authors suggests that youth interest in and demand for outdoor music festivals have been rebuilt, resulting in a post-pandemic resurgence of mass-attendance events. Conversely, negative examples exist where previously successful, decades-long festivals were forced to close (Drummond, 2022). In this turbulent period, analysing the specific category of multi-day events organised explicitly for youth and university students is of particular interest.

The Tourism Role of Hungarian Youth and University Festivals

Following international trends, significant changes occurred in the Hungarian popular music scene during the 1960s and 1970s, with the formation of numerous bands and an increased demand for live music (Buzinkay, 2012). The oldest music festivals began as youth events well before the regime change, aiming to provide entertainment for the youth of that era (Bácsné Bába, 2014). Although most early festivals ceased or were transformed, this study focuses on two “legal successors” and a third, later-founded festival, examining their impact on local tourism. The Szeged Youth Carnival (founded in 1964 and known as Szeged Youth Days – SZIN since 1968) and the National Touristic Meeting of University and College Students (EFOTT), established in 1976, survived the regime change and remain among the most well-known and popular music festivals today (Bácsné Bába, 2014; Fenyves

et al., 2019). They were later joined by the Campus Festival, established in 2002 (adopting its current name in 2007) (Bácsné Bába, 2014).

The general appreciation of festival tourism after the millennium is highlighted by the fact that 2010 was declared the “Year of Festivals” by the former Hungarian Tourism Plc., turning events based on Hungarian culture and tradition into a national marketing campaign. Domestic research linked to this thematic year compared Balaton Sound and VOLT Festival (Indra, 2009), while Sija and Schauer mann (2009) analysed the attendance habits of the 15–25 age group, although neither study focused on the youth–university festivals central to the present research. The latter study emphasised the high level of awareness of music events among young festival-goers; out of thirteen festivals surveyed, eight belonged to this category. Awareness followed a descending order: Sziget, VOLT, Balaton Sound, Hegyalja, Coke Club, EFOTT, Rockmaraton, and SZIN. This confirms that awareness of university-specific festivals is correlated with educational attainment; nearly three times as many graduates had heard of EFOTT compared to those without a high school diploma. This high level of awareness has made Hungarian popular music festivals a prominent area of research, with most publications focusing on Sziget (Hinek, 2021; Hinek & Kulcsár, 2019; Hinek & Papp-Váry, 2024; Indra, 2009; Iványi & Bíró-Szigeti, 2021; Kovács, 2009). However, due to differences in organisational structure, these flagship festivals are not directly comparable to youth-focused events.

Research concentrating on university festivals is limited, with significant gaps in guest turnover analysis. Nevertheless, Szabó and Závodi (2018) concluded that a stable festival portfolio contributes integrally to the growth of tourism in Szeged. Of the 51 festivals in 2017, three were popular music events with national reach, with SZIN notably closing the national summer festival season. For a comprehensive overview, the analysis of the “sharing economy” (P2P accommodation) is indispensable due to the price sensitivity of the youth demographic (Einav et al., 2016). Finally, the impact of festivals on the seasonality of host settlements is examined using the Gini index (Gini, 1912), a crucial factor for success, given that outdoor events are highly weather-dependent (Csapó & Végi, 2023).

METHODS

The study is based on a complex methodological approach combining quantitative and qualitative elements, applied by the authors in three steps within the following causal framework:

- A literature review, during which recent international and Hungarian academic articles and studies were examined.
- Selection of the units of analysis and determination of the characteristics and market positioning of the chosen festivals based on attendance data reported by organisers and various media platforms.
- Analysis of the festivals’ impacts on the tourism of the host destinations, based on tourism accommodation data available from the Hungarian Central Statistical Office (KSH).

In the first phase of the study, the most significant Hungarian and international publications on festival tourism were collected and analysed according to thematic aspects, with a particular focus on major events targeting youth audiences.

In the second phase, Hungarian university and youth festivals were surveyed in terms of their supply structure and visitor volume. Based on these criteria, the “target group” of the present study was selected, comprising three festivals: the National Touristic Meeting of University and College Students (EFOTT), the Szeged Youth Days (SZIN), and the Campus Festival in Debrecen. The selection methodology was twofold: first, the event had to possess a complex, multifaceted offering rather than serve a niche musical genre; second, it had to reach an annual attendance volume of 100,000 visitors. In the festival tourism market, this magnitude represents events that are well known and attended at a national level. The festivals’ performance indicators were gathered from secondary sources (articles, interviews, and press releases published in various media).

In the third step of the research, the impacts of the investigated festivals were identified within the host settlements and, where justified, at a broader destination level. Methodologically, guest turnover indicators for tourist accommodation—sourced from the Dissemination Database of the Hungarian Central Statistical Office (KSH)—were subjected to time-series and comparative analyses.

The investigation covers a five-year period (2021–2025). The methodological rationale for this timeframe is that, since 2021, monthly time-series data have been available at the settlement level for private and other types of accommodation, in addition to commercial establishments. The use of accommodation guest turnover data as the primary indicator is justified by several factors: these data are uniformly available in monthly breakdowns at the settlement level from the KSH/NTAK database, thus enabling temporal and spatial comparisons across the three festivals. However, it is important to note that this indicator has limited sensitivity in measuring the tourism impacts of university and youth festivals—a point that our results also emphatically highlight.

This study intentionally limits the investigation of impacts to tourism accommodation turnover and the three largest youth/university festivals. Accordingly, the results reflect impacts on these specific types of turnover and pertain exclusively to figures appearing in official statistics. They do not account for the impact of non-registered accommodation, which may be significant for the youth target group.

The findings are valid for the investigated period of 2021–2025, during which the locations and structures of the festivals remained stable. These results cannot be extrapolated to earlier or later periods, as similarly detailed data are not available for those timeframes. To more accurately map the motivations behind the statistical data and hidden turnover, future research involving qualitative, in-depth interviews with festival organisers is justified in order to further explore impact mechanisms and refine these findings.

RESULTS

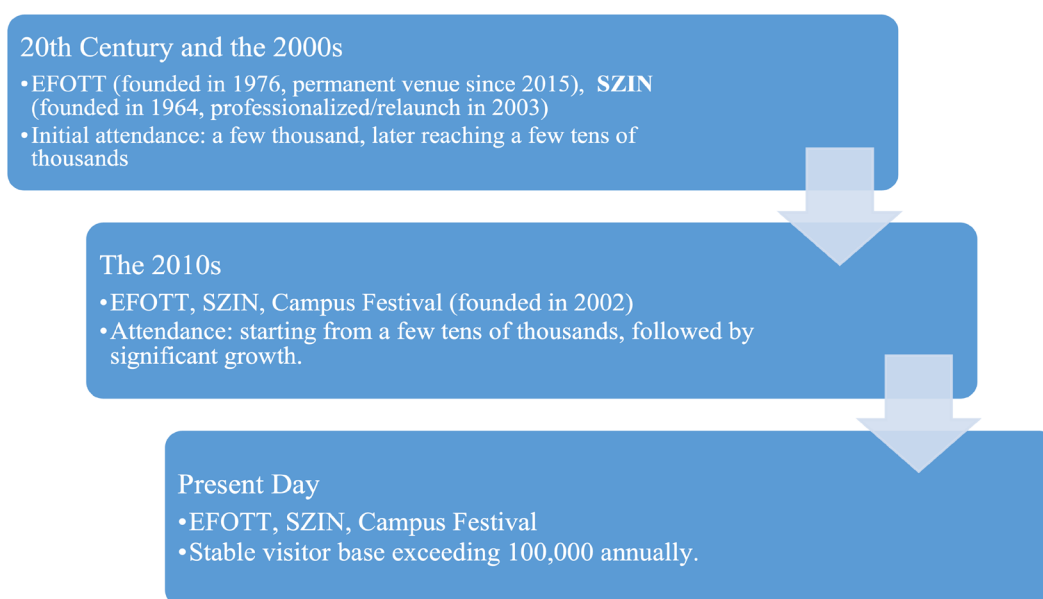
Developmental Trajectories of University and Youth Festivals

In Hungary, numerous university and youth festivals are organised annually. A significant proportion is still directly managed by universities (e.g., Pécs University Days, Szeged University Days), while others are typically organised at the municipal or city level (e.g., Szeged Youth Days). Their common characteristic is that they are generally popular music festivals specifically targeting young age groups, with both their marketing activities and performer line-ups tailored accordingly. While their organisation shows similarities to major, prominent music festivals (e.g., Sziget Festival, Balaton Sound), they differ in maintaining young demographics as their primary target audience.

Nearly every major higher education institution in the Hungarian festival market has a related event of varying scale (e.g., University of Pécs: Pécs University Days; Budapest University of Technology and Economics: BME University Days; University of Miskolc: Miskolc University Days; Eötvös Loránd University: Lágymányosi Eötvös Days). However, their scope is typically limited to the respective university, settlement, or region. This is a natural consequence of their primary function: providing entertainment and experiences for the youth of a specific institution or town. Consequently, attendance ranges from a few thousand at smaller events to a few tens of thousands at larger ones.

Three festivals constitute an exception at the national level, having become market leaders within the youth/university category: the National Touristic Meeting of University and College Students (EFOTT), the Szeged Youth Days (SZIN), and the Campus Festival in Debrecen. The developmental trajectory of these festivals can be divided into three stages (Figure 1).

Figure 1. Developmental Stages of the Analysed Festivals

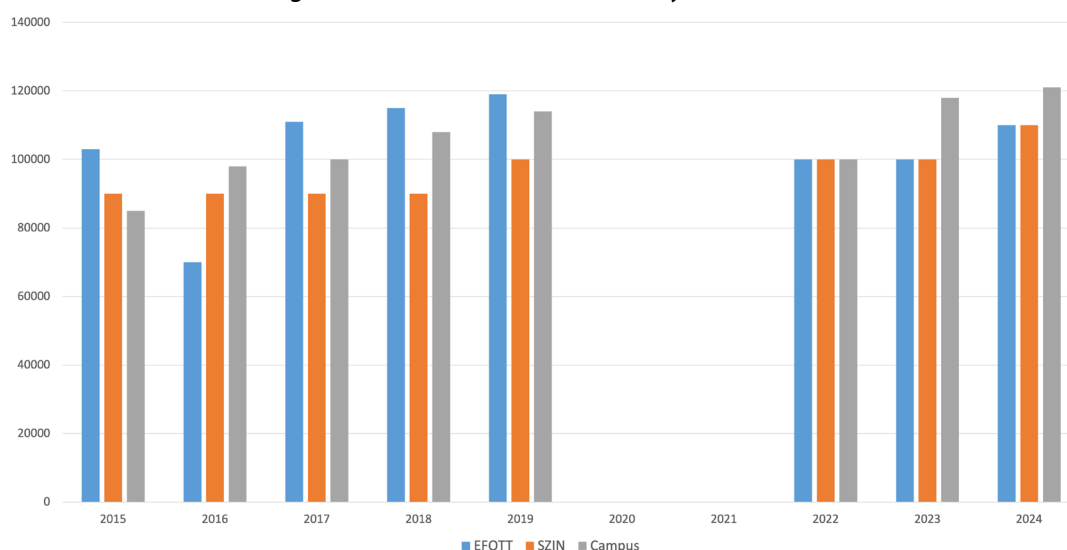


Source: Data published by festival organisers and media reports

SZIN and EFOTT were founded in the second half of the 20th century (1964 and 1976, respectively), while the Campus Festival was established in 2002 (under the name Vekeri-tó Festival). The first developmental stage—lasting until the 2010s—spanned decades for the former two and only a few years for the latter. Key characteristics of this period include the pioneering role of SZIN and EFOTT in the Hungarian festival market, although they benefited only marginally from this in the period immediately following the regime change. This is evidenced by the fact that in the 1990s and 2000s, along with many other university/youth events, they maintained a smaller audience of a few tens of thousands annually.

The Hungarian festival market underwent significant development in the 2010s; attendance at Sziget Festival exceeded 500,000 annually, while Balaton Sound and VOLT Festival reached 150,000, placing them among Europe’s largest festivals. The professionalisation of the investigated events also took place during this period (Stage 2). Organisers continuously expanded the three youth festivals following the model of market-leading events, both by booking major international performers and significantly broadening their service offerings. As a result, all three festivals reached the “100,000-visitor” threshold by the late 2010s (Figure 2), becoming defining tourism attractions and cultural-music festivals for their respective settlements.

Figure 2. Guest Turnover of the Analysed Festivals

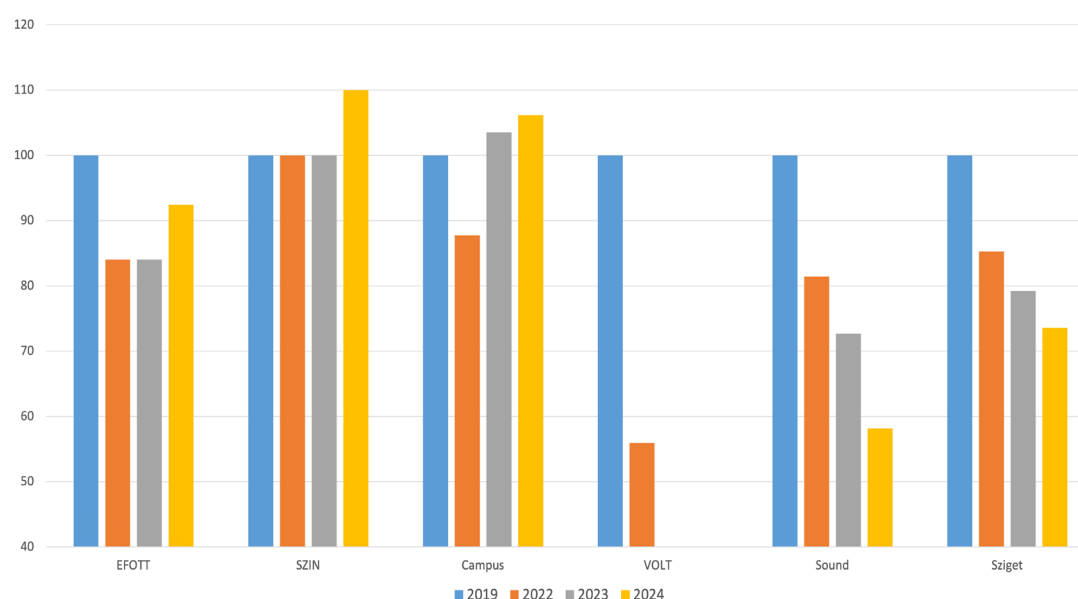


Source: Data published by festival organisers and media reports

The third stage encompasses the COVID-19 pandemic and the subsequent period. Events were cancelled in 2020 due to the pandemic and were held with restrictions in 2021 (typically requiring COVID-19 immunity certificates); therefore, these years were excluded from the analysis. From 2022 onwards, visitors could attend without restrictions, and as shown in the figure, all three festivals demonstrate continuity in attendance. Each investigated event maintained an attendance level exceeding 100,000 in the post-pandemic years, and by 2024, they even showed growth (EFOTT and SZIN: 110,000; Campus Festival: 120,000).

Another important characteristic of the investigated university and youth festivals is their high level of resilience. Their recovery indicators following the COVID-19 pandemic were significantly stronger than those of Hungary’s flagship, market-leading festivals. Using 2019—the last pre-pandemic year—as the base year, market-leading festivals showed a significant decline, whereas no such decrease was observed for the events examined in this study (Figure 3).

Figure 3. Change in Guest Turnover of the Analysed Festivals Compared to the 2019 Base Year (%)



Source: Data published by festival organisers and media reports

Following the pandemic, the festival market changed significantly due to several factors: increased production costs (higher artist fees, energy prices, rental fees, etc.), significant inflation in Hungary, and declining discretionary income on the consumer side. Consequently, a substantial drop was observed in the consumption—primarily domestic—of market-leading festivals. As a result, the VOLT Festival ceased after 2022, Balaton Sound after 2024, and the Sziget Festival recorded 416,000 attendees in 2025, falling far short of its pre-COVID volume of over 500,000.

In contrast, the smaller and more flexibly organised university and youth festivals, owing to their higher resilience, were better able to respond to these changes. As demonstrated, they not only avoided decline but were also able to increase their visitor numbers by 2024.

Impacts of University and Youth Festivals on Accommodation Turnover

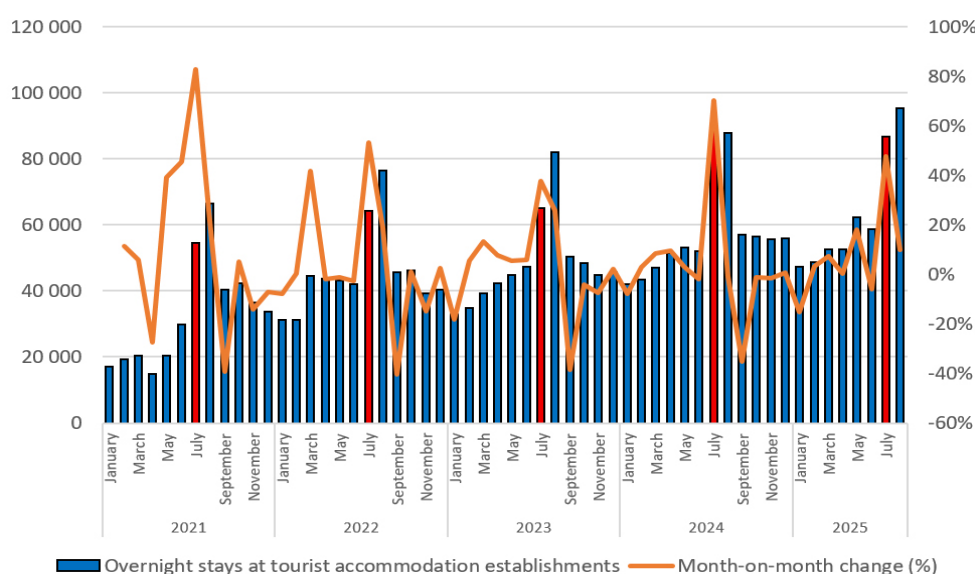
To evaluate the impact of festivals, we analysed the effect of the three highlighted youth festivals (Campus, SZIN, EFOTT) on accommodation turnover based on tourism accommodation data for the 2021–2025 period. The limitation of the investigation period was intentional; the rationale for this restriction is that monthly data for private and other types of accommodation have been available since 2021, whereas in previous years, such data were only accessible for commercial accommodation.

Given that visitors to university and youth festivals primarily seek low-cost accommodation—where private and “other” types represent a significant share—we examined the dataset and period in which all accommodation types were consistently available for each month.

The analysis was primarily conducted through time-series and comparative analyses, focusing specifically on the months in which the respective festivals took place (EFOTT: first half of July; Campus Festival: second half of July; SZIN: late August).

The most significant finding of the study—which somewhat contradicts our preliminary expectations—is that none of the investigated festivals shows a substantively identifiable impact on accommodation turnover. In most cases, the turnover data for the festival months either do not stand out from the natural seasonal peaks characteristic of the region (this is particularly striking in the case of Lake Velence) or—in the case of major urban venues (Debrecen, Szeged)—the potential impact of the event is absorbed within the total accommodation turnover of the settlement and does not generate a detectable surplus.

Figure 4. Development of Overnight Stays in Debrecen's Tourist Accommodations, Highlighting the Month of the Campus Festival (July)



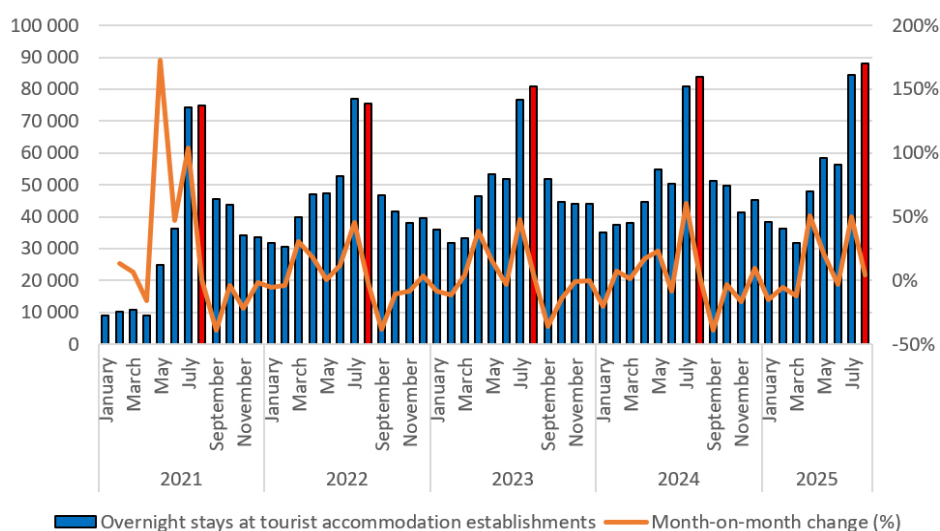
Source: KSH Dissemination Database, authors' own construction

The cases of the major urban venues—Debrecen and Szeged—clearly illustrate this general finding. In the case of the Campus Festival in Debrecen, an examination of the monthly guest and overnight stay data for July reveals no consistent spike attributable to the festival (Figure 4). While a sharp increase is observed in July compared to June, this growth continues into August. Furthermore, in 2021—when the Campus Festival was held in a reduced format due to COVID-19—the July increase did not differ significantly from those observed in subsequent years. This implies that, in terms of accommodation turnover, July and especially August are the peak summer months, and the festival does not substantially modify this pattern. Although a significant increase was observed in 2024 (a 36% increase in overnight stays compared to the previous year and a 70% increase compared to

the previous month), this was not accompanied by a corresponding trend in guest numbers (+8% compared to the previous year). The picture is further nuanced by the fact that in July 2025, a decrease (–2%) was already recorded compared to the previous year. It can be concluded that the 2024 anomaly was likely not the result of the festival but rather of other independent factors (e.g., major industrial investments in and around the city) increasing demand for accommodation. It is also worth noting that in Debrecen, August is a stronger month for tourist accommodation (likely due to the Flower Carnival) than July (the month of the Campus Festival), which supports the finding that the Campus Festival has no detectable impact on accommodation turnover. The data analysis therefore shows that, within the tens of thousands of overnight stays in Debrecen, there is no “anomaly” (surplus) that can be attributed to a festival effect.

A similar situation is observed in Szeged, where August is also the peak month when SZIN is held; however, the data do not show a significant turnover surplus (Figure 5); in fact, barely any increase is observable compared to the previous month.

Figure 5. Development of Overnight Stays in Szeged’s Tourist Accommodations, Highlighting the Month of the SZIN Festival



Source: KSH Dissemination Database, authors’ own construction

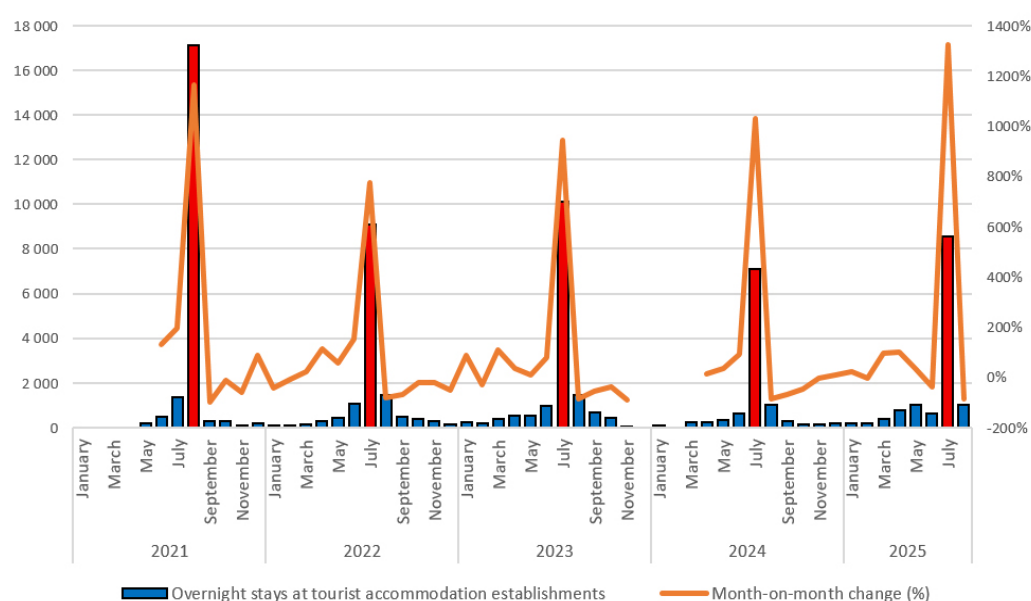
When examining the surroundings of the settlements, we found no evidence of the festivals’ impact on accommodation guest turnover in the vicinity of Debrecen or Szeged. Near Debrecen, with the exception of Hajdúszoboszló, there are no settlements with significant accommodation capacities, and the data for Hajdúszoboszló show no detectable impact from the Campus Festival. Near Szeged, Mórahalom and Hódmezővásárhely possess more significant capacities, but neither city experienced a substantive change in accommodation turnover during the festival month.

Research on other festivals (Indra, 2009) also shows that visitors rarely stay beyond the immediate vicinity of the festival venue, and a significant proportion spend the night on the festival grounds (e.g., Sziget Festival). It was also characteristic of Balaton Sound that the majority of visitors find accommodation in Zamárdi or in neighbouring Szántód, very close to the venue (Hinek et al., 2026).

Based on this, even if university and youth festivals have an impact in Szeged and Debrecen (our data suggest they do not, or that it is negligible), it is typically concentrated within the city where significant capacities are available, while no spillover effects are generated in the surrounding settlements.

The most complex case among university festivals is EFOTT and the Lake Velence region, which at first glance appears to be an exception. In the host settlement of Sukoró, a dramatic “festival shock” that can no longer be explained by natural seasonality is observed in the guest turnover statistics. On average for the 2021–2025 period, the number of overnight stays in July increased more than tenfold in certain years compared to June (Figure 6). When compared to the average of June and August, the number of guests in July exceeded the average of the preceding and following months by +337%, and the number of overnight stays by +597%, producing a pronounced spike in the settlement’s data. Between 2022 and 2025, approximately two-thirds of the settlement’s total annual accommodation turnover typically fell within this single month.

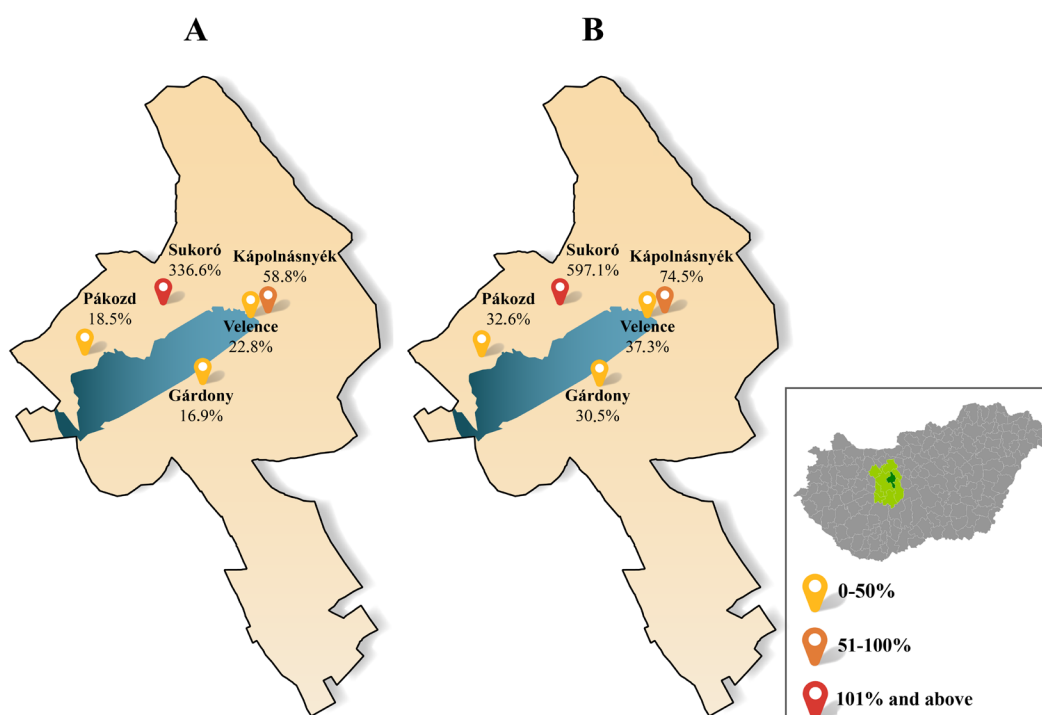
Figure 6. Development of Overnight Stays in Sukoró’s Tourist Accommodations, Highlighting the Month of the EFOTT Festival



Source: KSH Dissemination Database, authors’ own construction

However, this striking relative growth must be qualified, as the scale of accommodation capacities and their turnover in Sukoró is very low; between 2022 and 2025, the annual number of guests ranged only between 3,000 and 5,000, with overnight stays around 12,000–15,000. This is roughly equivalent to the performance of a single medium-to-large-capacity hotel in Budapest. Consequently, the jump attributable to the festival is much more modest in absolute terms: it represents an average surplus of +1,297 guests and +4,653 overnight stays compared to the arithmetic mean of turnover in the months preceding and following the festival period.

Figure 7. Change (Surplus Turnover) in the Number of Guests (A) and Overnight Stays (B) in the Tourist Accommodations of Settlements Around Lake Velence Compared to the Average Turnover of the Months Before (June) and After (August) the Festival, 2022–2025 Average



Source: KSH Dissemination Database, authors' own calculation/construction

Since Sukoró's capacities are minimal, to better estimate the festival's impact, we also examined turnover in the surrounding Lake Velence settlements during the month of EFOTT. We applied the same method as in Sukoró: calculating the arithmetic mean of turnover for the months before (June) and after (August) the festival, then comparing this average to the July (festival month) turnover. These percentage increments were averaged for the years 2021–2025. The five-year average July guest and overnight stay increments, compared to the averaged turnover of the surrounding months, were not outstanding (Figure 7), leading to the conclusion that the festival's impact does not radiate significantly to the surrounding settlements and does not generate substantive regional turnover growth. The July surplus measured in the investigated settlements (Gárdony, Pákozd, Velence) aligns with turnover growth resulting from natural summer seasonality. In Velence and possibly Kápolnásnyék—although the latter is not an immediate neighbour of Sukoró—a spillover effect may arise due to geographical proximity. In Velence, the absolute surplus (average +1,181 guests, +5,742 overnight stays) is similar to that of Sukoró, but these figures occur alongside a much higher total settlement turnover and are likely largely due to natural seasonal peaks.

An analysis of EFOTT 2022 by the Hungarian Tourism Agency (MTÜ), based on NTAk and mobile cell data, showed similar results. In 2021, 10,000 overnight stays were recorded in Sukoró, which decreased to 7,900 in 2022—a negligible figure compared to the festival's 80,000–90,000 visitors and five-day duration, even if some accommodation impacts appeared in Gárdony and

Velence (MTÜ, 2022). These data are consistent with our results; absolute differences stem from methodological variations between our approach (growth relative to the average of the preceding and following months) and the agency's approach (turnover during the festival week compared to the preceding week).

In summary, the impact of EFOTT on tourist accommodation turnover is local—although in this case some spillover effects are observable—and is negligible for the host region (Lake Velence) as a whole. Across the five settlements (Pákozd, Sukoró, Velence, Kápolnásnyék, Gárdony), the annual guest turnover averaged over 90,000 guests and 250,000 overnight stays. Based on available data, approximately 4–6% of the annual guest turnover is attributable to EFOTT. This is not significant, especially considering that turnover along the lake is highly seasonal; within this concentrated volume, only every twentieth overnight stay is linked to the festival.

Factors Mitigating Accommodation Impacts

Given that the attendance of university and youth festivals has developed favourably—characterised by rapid post-COVID recovery, high resilience, and visitor numbers reaching or approaching 100,000—the evaluation of the above results raises a critical question: where are festival-goers staying if the impacts of these festivals are undetectable or only limitedly identifiable in tourism accommodation turnover?

The most likely explanation is that a significant proportion of festival-goers (especially in urban venues such as Debrecen and Szeged) are local residents or arrive from surrounding settlements (e.g., from Székesfehérvár to EFOTT) and thus do not utilise accommodation. In this context, it is important to note that registered attendance figures for festivals essentially represent the aggregate number of passes and day tickets sold. Many attendees arrive with day tickets, which are not only more affordable than purchasing a full-event pass but also allow visitors to select specific days (evenings) for particular programmes. For day-ticket visitors, the utilisation of accommodation is typically non-existent or occurs at a much lower rate. If we assume that day-ticket holders constitute the majority—as is also the case for the Sziget Festival—it is unsurprising that these festivals have a negligible impact on accommodation guest turnover.

Another factor is the price sensitivity of the target group (students and youth), which likely results in an overrepresentation of non-registered accommodation (e.g., staying with friends or relatives) that does not appear in official datasets.

A third key factor that nuances the previous two is that the festivals themselves provide accommodation. In the case of SZIN, the Szeged Partfürdő Camping and Apartments operates as a permanent campsite on the festival grounds, recommended by the organisers. In Sukoró, during EFOTT, organisers provide camping opportunities on a section of the public beach further from the waterfront and the stage, accessible with a festival/camping ticket. This “pop-up” campsite almost

single-handedly explains the surplus in guest and overnight stay numbers observed in Sukoró's statistics, given that the settlement's permanent accommodation capacity is otherwise minimal.

CONCLUSIONS

The study reaches two seemingly contradictory conclusions. On the one hand, the investigated university and youth festivals (EFOTT, SZIN, Campus) demonstrated extraordinary market resilience in the post-COVID-19 period; their attendance figures not only recovered but grew, in contrast to the recession or disappearance of major market-leading festivals.

On the other hand—representing the central paradox of the research—this outstanding market success and six-figure attendance volume are not detectable in the accommodation turnover of the host destinations using the applied methodology (analysis of tourism accommodation data), with the exception of EFOTT, where the settlement's size and baseline tourism turnover are relatively modest.

In the two major cities investigated, Debrecen and Szeged, the accommodation impact of the Campus Festival and SZIN is not statistically identifiable. This does not mean that such an effect does not exist, but rather that tourism accommodation data do not allow for an isolated estimation of the surplus generated by these festivals within overall urban turnover.

In the Lake Velence region, the July turnover increase is generally observable across settlements, but this is predominantly the result of natural seasonality. The “festival effect” is primarily detectable in Sukoró and, among the surrounding settlements, in Gárdony and Velence. The growth in accommodation turnover attributable to EFOTT along the lake accounts for approximately 4–6% of the annual guest and overnight stay figures.

In summary, while these three successful youth festivals host over 100,000 visitors annually, their impact is either undetectable in municipal accommodation statistics (Campus, SZIN) or the detected turnover is only locally prominent and cannot be considered significant in a broader regional context (EFOTT).

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Other Sources

The annual guest turnover indicators for the National Touristic Meeting of University and College Students (EFOTT), the Szeged Youth Days (SZIN), and the Campus Festival in Debrecen used in this study were derived from various sources. The vast majority of the data consists of figures released directly or indirectly by the organizers. These were either published directly by the organizers on various

media platforms (official websites, press conferences, etc.) or were reported in various interviews and accounts (e.g., reports by the Hungarian News Agency [MTI] or Hungarian Television, as well as feature articles on major domestic media platforms) where the organizers provided statements to the respective outlets. A smaller portion of the data originates from official event reports and coverage produced by various offline and online media outlets regarding the festivals.

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