

National tourism policy – a matter of economy, financing or actor competencies

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Abstract

Traditionally, the political importance of tourism is discussed from an economic point of view. The importance of tourism in the political domain is still assessed in the respective economic contribution despite a proclaimed need to assess the importance more holistically. This paper provides empirical evidence of whether the holistic view reflects the political reality of European countries. It addresses decision criteria applied in national politics and the respective countries' National Tourism Organisation based on socio-economic and tourism-related data in combination with political selection criteria based on biographic data. The analysis, incorporating quantitative and qualitative methods, shows that governments value tourism based on the societal visibility shaped by tourism intensity. However, the political responsibility of tourism is assigned based on generic political parameters without a specific focus on tourism-related expertise. Such expertise tends to be acknowledged more at the operational level within National Tourism Organizations.

Keywords: tourism policy; expertise; NTO; tourism intensity, economics.

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1. Introduction

The recent debate and developments regarding over-tourism in some of the most prominent spots like Barcelona, Mallorca and Venice again illustrated the conflict between tourist activities and the quality of life of the residents (L. Hall, 2024). Consequently, there is a strong desire for political action to solve this conflict. Therefore, tourism policy ranks high on the tourism agenda. Political aspects enjoy a dual role in tourism development, being responsible for the protection of residents on the one hand and the economic development of tourism and a corresponding increase in Gross Domestic Product (GDP) on the other hand (Boukas & Ziakas, 2016). Tourism policy is considered a cornerstone for tourism success. Most tourism activities appear to be unlikely without governmental support or coordinating activities. Therefore, it is no surprise that it appears to be a common practice to place tourism on a ministry level (cf. Chaperon & Kennell, 2022; Hay, 2020), representing the importance of the industry for the economy and society. However, the political setup on the national level does not follow a common rule (OECD, 2022). This reality is also discussed within tourism academia, explaining a correlation between political ideology and the political value of tourism for the government. Such a link has been particularly assessed for European countries (c.f. Vogler, 2022; Webster *et al.*, 2020; Webster & Ivanov, 2012). Unfortunately, the OECD (2022) overviews do not allow a sound ideology-based assessment on like-by-like terms. They, however, indicate a more substantial presence of non-governmental economic actors for societies not following a dominating social democratic ideology (c.f. Webster *et al.*, 2020; Webster & Ivanov, 2012). The common denominator, at least for European countries, seems to be the economic importance of tourism for the country and its society (Keller, 2015).

In addition to the economic contribution, the positive labour market effects of tourism as an industry stand out (Stevenson *et al.*, 2008). Both justify a governmental and political intervention. Such intervention is often accompanied by the justification of the political ability to steer actor activities and the work towards a public interest (Scott & Marzano, 2015), which is important in such conflicting scenarios as described above. As a result, an assessment of the aspects that shape the political value of tourism in the various countries is necessary. The paper provides such an assessment from a political actor perspective as well as investigating financing aspects. Financial investments in tourism provided by the government or government-related institutions are considered as problematic. In regions with a major dominance of tourism as economic activity, they fuel the conflict between tourism and the quality of life of residents. For example, the current anti-tourism movement in some of Southern Europe's most important tourism markets is expressively addressing international tourists and steering attention to another quasi-political actor in this equilibrium, the National Tourism Organisations (NTOs). NTOs are either organised within governmental structures or closely connected to those (Baum, 1994). Those are responsible for promoting the respective destination country in the international inbound tourism market.

NTOs may be considered part of tourism policy as they do not only have promotional or marketing-related responsibilities. Apart from that, they may be involved in tourism support activities, including licensing (Webster *et al.*, 2011). In addition, governments and subsequent political institutions have oversight over NTO activities, further advocating for a perception of an NTO as a political entity despite the fact they are not always governmental institutions (Choy, 1993; Hay, 2020; Zahra & Ryan, 2005). Overall, the discussions about the importance of tourism policy in general, and the corresponding NTO-related aspects in particular, circle around the economic contribution to the respective countries (eg. Truong, 2013). However, there is a lack of research addressing the impact itself and other aspects that might shape political and NTO-related decisions (cf. Dwyer, 2023). In light of the outlined responsibilities, actor competencies as decisive elements in executing political and NTO-related responsibilities are neglected. Hence, the following paper tries to address this gap and shed light on possible reasons for the importance of tourism for the political agenda and how this subsequently affects the work executed by the NTOs.

In all, the goal of the paper is to provide an assessment of the role of tourism for political actors on a national level and the corresponding forces contributing to tourism politics-related activities on an NTO level. Therefore, it presents the state of discussion in research and empirically builds up on this by evaluating the political setup of tourism politics in Europe. This is done from an organisational and qualification-based perspective for both the governmental and the NTO set-up. To evaluate the impact, the paper uses a variety of GDP-related, financial and international visitor-related data to quantify possible justifications for the mentioned set-ups.

2. Literature Review

2.1. *The importance of tourism GDP for tourism policy*

In recent literature, the focus on the link between tourism policy and economic development is criticised for being mono-dimensional as other factors should also be discussed. This is especially true in the context of sustainability in tourism (Dwyer, 2023). However, GDP is used because of its usability in a data generation context (Agiomirgianakis et al., 2017; Blake et al., 2001), not necessarily because of its direct impact on tourism policies. This shall not neglect researchers' attempts to establish a direct empirical link (e.g. Pjanić & Mitrašević, 2020). Regardless of this, there is a present connection between economic development generated by touristic activities and its respective impact on the formulation of public (tourism) policy. In particular, the focus is on economic growth (Goel & Budak, 2010). Those economic development links to tourism and the respective political activities have been analysed for various countries (C. M. Hall, 2009; Meng et al., 2013; Truong, 2013). In general, the underlined importance of governments for tourism and, hence, the economic development of a country assigns them a significant and facilitating role, especially in developing countries. As a result, the governmental activities do not stop with the formulation of policies.

The facilitating role is also acknowledged in developed countries. However, in those countries the policy formulation itself appears more in the forefront. In most cases, tourism policies do not exist purely as a separate regulation branch. However, they are an element of wider economic policies that illustrate the predominant economic perception of tourism politics (Keller, 2015). Based on the literature and subsequent discussions, it is evident that depending on the specific countries' governmental involvement is necessary for the success of the tourism system. Whether it is done via tourism policy activities or wider economic policy activities does not impact the necessity. This applies to both the development stage of tourism in a country (Javed & Tučková, 2020; Jenkins & Henry, 1982) and specific aspects of tourism (Ruhanen, 2013). Regardless of the specific activity, the impact of tourism policy and its role as a promoter is conceptualised in various aspects (Keller, 2015) and, hence, links to the political aspects of NTOs.

2.2. *NTOs responsibilities in the tourism policy context*

NTOs' primary responsibility traditionally emphasises marketing and related aspects, whereby sustainability aspects are claimed to become more important based on the development stage of the respective country (Araújo, 2022). They serve as an institution that supports the tourism industry (Akehurst et al., 1993). Given their link to the governmental structures in the respective countries, they also assist in tourism policy development to a more considerable extent (Baum, 1994). Within the literature, there is a great emphasis on the duality of commercial support and policy interaction as part of the NTO's areas of work (Pechlaner & Tschurtschenthaler, 2003; Webster et al., 2011; Wight, 2013). Though the governmental structure indicates that NTOs work on tourism policies from a rather governmental perspective (Upadhyay, 2016), Wight (2013) suggests that, in fact, NTOs also lobby for tourism activities at governmental levels.

The strong link to marketing and industry support functions, especially in the Western hemisphere, has been attributed to the dominance of liberal market ideas in public policy (C. M. Hall & Jenkins, 2004).

Regardless of the dominating ideology, the duality of roles between promotion and policies may result in a conflict of interest of the NTO and have a negative impact on both reputation and acceptance among various stakeholders in the tourism system (Choy, 1993). Balancing a variety of interests is one of the most important and challenging tasks of the respective organisations. This can be illustrated in the area of sustainability and fighting climate change (Araújo, 2022), where policies are geared toward sustainability (Olszewski-Strzyżowski, 2022; Payne *et al.*, 2022; Soteriou & Coccossis, 2010) and the NTOs responsibilities lead to unsustainable tourism developments (Gössling *et al.*, 2024). A similar scenario becomes evident by focusing on overtourism scenarios. Though an NTO may be responsible for steering or limiting policies, the measurement of success remains a rather marketing-related visitor performance (Akehurst *et al.*, 1994; Koh & Fakfare, 2019; Oklevik *et al.*, 2019). Such a scenario may, in particular, result from a lack of integrated policies that consider all tourism-related aspects (Butler & Dodds, 2022).

2.3. Expertise and its impact on tourism policy

The conflict between tourism policy responsibilities and the potential conflicting performance measurement based on marketing success and, subsequently, the possible conflicts between NTOs with governments and industry players require competent actors for all parties involved. However, the focus on competencies may be diluted by ideological aspects of the governmental decision process (Webster & Ivanov, 2012). The importance of actors, irrespective of ideology, has been stressed in various tourism policy contexts based on power distribution aspects (Bramwell & Meyer, 2007) and the field of tourism planning within tourism policy (Dredge, 2006). However, most research focuses on the rather abstract perspective of actor interaction, not necessarily their skill and experience profile, which is needed to address the complexities and interdependencies of the topic (Stevenson *et al.*, 2008).

Competencies in managing complexities in tourism are important for a variety of stakeholders and actors, but not all stakeholders need them to the same extent. As the tourism industry may afford to maintain a rather selfish position and predominantly focus on individual success factors (cf. Marais *et al.*, 2017), the situation is different for the political arena and NTOs alike. Balancing conflicting interests is key to their success from a political perspective (Tyler & Dinan, 2001). This even applies to marketing-oriented NTOs that do not have to consider the interests of the respective residents. They still have to balance a variety of interests among the tourism industry and other stakeholders (cf. Volgger & Pechlaner, 2014). Even governmental actors have to deal with those interests, and based on their ability to act on the balance, they are considered successful or not (Nunkoo & Smith, 2013).

In order to be successful in dealing with such a variety of tasks and interests, a respective actor-competency appears to be crucial on either a personal or institutional level. Ideally, the competencies are present on both levels. Otherwise, e.g. weak institutional competencies must be compensated by a level of personal actor competencies (Carreri, 2021). From a political perspective, this is not without downside, as a high level of personal competencies of political actors results in a misrepresentation of the population. They may perceive politicians as elitists because of their level of competence and their corresponding backgrounds, which are different and superior from a socioeconomic perspective (Dal Bó *et al.*, 2017). As this may be the case, the perception can correspond to the actual reality.

Regardless of the impression of the population, competencies and skills to deal with complexities in the tourism system are evident (Fayos-Solà & Alvarez, 2014). So, to deal with the complexities and conflicting interests, it appears logical that the selection of people in political institutions and the corresponding NTOs should consider tourism experience to ensure successful activities in tourism policy and related aspects.

3. Challenging the economic dominance in the tourism policy debate

As a result, there seems to be a common understanding in academia that tourism policy and related activities belong to the domain of economic policy activities. This applies not only to governmental activities (Bramwell, 2011; Nunkoo & Smith, 2013; Webster *et al.*, 2011) but also to the genuine interest of political actors (Chaney, 2015; Vogler, 2022). Such a common understanding is fuelled by the indirect link of economic activities by tourism actors. However, it remains unclear whether the direct economic contribution leads to significant adjustments in the domain of policy and within political institutions. Dwyer's (2023) call to think of politics beyond the economic factors has not yet been addressed. The following research is responding to this call and trying to assess tourism politics from a broader level without ignoring the economic perspective.

In light of the renewed realities of overtourism following a pandemic period of undertourism (Erdmenger, 2023), governments and their subsequent institutions are now again forced to balance the interests of their residents, society and economy (Bramwell, 2011). Dealing with such complexities from a rather political perspective, addressing a tourism system that follows its own logic would call for tourism-competent actors within the political domain and the respective institutions. Surprisingly, the question of expertise so far is only addressed within the tourism workforce (e.g. Chapman & Lovell, 2006; Zehrer & Mössenlechner, 2009), but not for the associated domain.

4. Methodology

The analysis is based on a comparative quantitative and qualitative governmental data analysis. In the initial step, the geographic scope was selected based on countries of the European Union, with Iceland, Norway, Switzerland, and the United Kingdom additionally included. For a qualitative comparative analysis of the political setup, the governmental websites have been consulted to identify the political positioning of tourism from a political perspective by applying an OECD (2022) derived logic. Additionally, biographic information of the highest-ranking governmental official responsible for tourism has been analysed via a qualitative content analysis to digest their tourism-related expertise level based on an approach proposed by Wilson and Lohman (2019). This analysis was executed in the period between the end of April and May 2024 and reflects the governmental setup.

To provide a quantifiable comparison, the GDP Share of tourism in those countries provided by the World Travel and Tourism Council (WTTC) and the volume of tourists provided by the World Tourism Organization of the United Nations (UN Tourism) have been used to calculate correlative measurements and to provide an indication of importance.

Based on gathered data the Tourist Intensity Ratio (TIR) and the International Tourist Intensity Ratio (ITIR) have been calculated as derived measurements (cf. Appendix A):

$$TIR = \frac{\text{Volume of Tourist}}{\text{Population}} ; ITIR = \frac{\text{Volume of International Tourist}}{\text{Population}}$$

These measurements are proxies representing the intensity of interaction between tourists and the residents (Kavarnou & Nanda, 2018). As this paper focuses on the national policy level, it is deemed appropriate to concentrate on the ITIR. Domestic tourism is considered to have a more significant impact on the regional level and balances out on a national level (Haddad *et al.*, 2013). This assessment also indicates that national government decisions and activities regarding tourism are more closely linked to international tourism activities. The governments evaluated are formed by general elections, and a variety of regional tourism issues are addressed on a rather local level (OECD, 2022), which is outside of the consideration of this paper. In addition, data availability and consistency in the available datasets are better on the international level when focusing on visitor numbers (UNWTO, 2023). Hence,

to provide a consistent assessment, only the international visitor numbers and the derived ITIR are used moving forward.

Given the importance of international visitors and the role of NTOs in attracting international visitors (Gössling *et al.*, 2024; Hay, 2021), an interlink between those dimensions may be assumed. Hence, in a second step the corresponding NTOs of those countries have been comparatively analysed with particular emphasis on their budget position as well as self-proclaimed and assumed reason of existence. It needs to be noted that not every country has a clearly identifiable NTO (OECD, 2022). According to OECD (2022) data, NTOs are, to a large extent, funded by the government, which has been used to evaluate the amount of funds in euros for the same 2022 period. To again provide a comparative analysis of the background of the NTO executives, the paper used a comparative biographic analysis to evaluate the levels of expertise. The information was gathered from governmental websites, NTO websites, news releases, and LinkedIn profiles (cf. Wilson & Lohmann, 2019). The data extraction took place at the end of April and the beginning of May 2024 as well.

5. Findings

5.1. Political perception of the importance of tourism

Except for France and Portugal, all Mediterranean countries have a tourism ministry at the cabinet level, regardless of their tourism share of the GDP. Besides the cabinet positioning, Mediterranean countries also share a comparably high level of tourism intensity. The exceptions of France and Italy are explainable by the number of inhabitants in those countries, which reduces the calculated intensity in this respect.

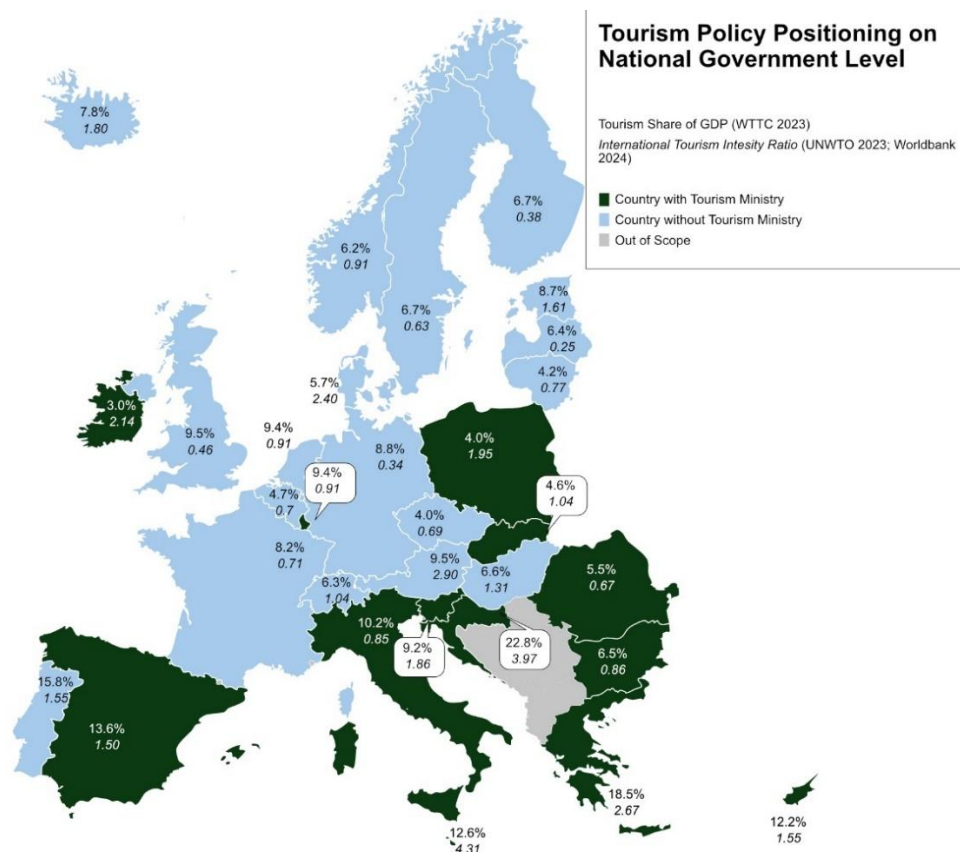


Figure 1. Overview of tourism ministries in selected European countries (Authors own elaboration)

For the majority of countries, the political perspective on tourism is an economic one. Notable exceptions include Iceland, Ireland and the UK, where tourism is politically linked to cultural aspects. Other countries that share a non-economic political grouping are Poland, Slovakia, Slovenia and Croatia. All of them politically combine tourism with sport. This shows a regional cross-country clustering of the political position and may be attributed to geographic or historic proximity (cf. Figure 1).

Though this indicates a slightly different political set-up with a presumable difference in the scope of responsibilities for those clusters, economic aspects are still considerable. Taking the UK as an example, the OECD (2022) policy evaluation shows that cultural aspects are combined with economic aspects and strong cooperation with more economically driven governmental departments. Likewise, an evaluation of the sports and tourism combination does not reveal a combination in terms of content. Hence the political setup may well be resulting from the respective political history or linked because of the rather recreational aspect of both sports and tourism (ibid.).

Comparing the GDP share of tourism with the existence of a ministry responsible for tourism or a comparative institution shows that countries with a GDP share of more than 10 % tend to have a tourism ministry. Though this indicates a correlation between GDP share and tourism positioning at the cabinet level, such a connection does not exist on a broad scale. Comparing the two variables shows a weak correlation ($\rho = 0.197$) at a rather insignificant level ($p > 0.3$). Instead, a statistically significant ($p < 0.001$) strong correlation ($\rho = 0.575$) between the GDP Share of Tourism and the International Tourist-Resident Ratio is visible on a country level (cf. Figure 2).

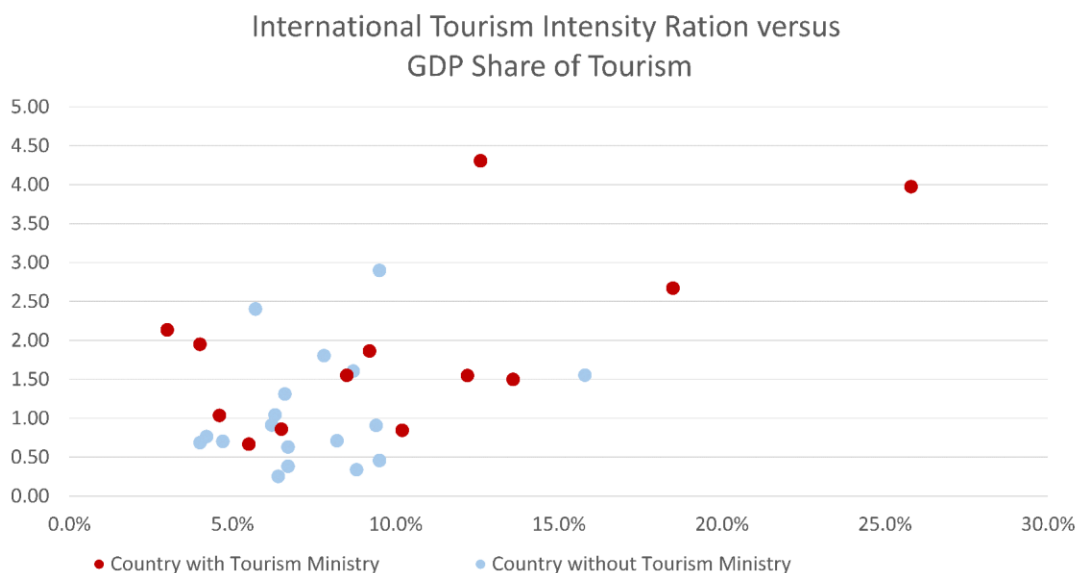


Figure 2. GDP Share and International Tourism Intensity Ratio

This indicated that the importance of tourism for the economy is increasing in line with the intensity of international incoming tourists. International tourism, hence, seems to provide a higher economic value per tourist for the country's economy, presumably driven by the necessities of accommodation and gastronomy supply.

The intensity of international tourism also seems to shape the perception of the political importance of tourism in general. There is a moderate correlation ($\rho = 0.421$) at a statistically significant level ($p < 0.02$) between the International Tourist-Resident Ratio and the existence of a ministry responsible for tourism. Countries with a higher International Tourist-Resident Ratio have a tourism ministry or a comparable department at the cabinet level.

Irrespective of a position in the government, the political actors that head the tourism policy-related governmental institutions tend to be selected on a rather political rationale. Only three of the politicians analysed have a tourism-related experience background, which may either result from working in the industry or having a tourism educational background (cf. Table 1). Therefore, it is fair to state that the decision about such positions is driven by a decision following political rationale, not a competency-based one.

Table 1. *Political Actor position and prior experience*

Country	Responsible Governmental Position	Assumed current role in	Dominant prior activity	Education / Field of Study	Tourism industry roles or tourism education
Austria	Secretary of State	July 2022	Hotel and tourism consultancy	Degree in Business Management with specialisation in Tourism and Human Resources	Yes
Bulgaria	Minister of Tourism	June 2023	Politician on EU level	Degree in International Relations	No
Croatia	Minister of Tourism and Sport	July 2020	Politician in the area of transportation and infrastructure	PhD in Transport and Traffic Sciences	No
Cyprus	Deputy Minister of Tourism	March 2023	Political roles with focus on tourism	Degrees in Business Administration and Communication	Yes
Czech Republic	Director General	April 2023	Political and industry roles with an emphasis on external relations and the EU	Degrees in Economics and West European Studies	No
France	<i>Ministre délégué</i> for SME, Trade, Craft and Tourism	July 2022	Extensive political career and significant prior experience in public relations	Degrees in History and Marketing Management	No
Germany	Federal Governmental Coordinator of the Maritime Industry and Tourism	January 2023	Politician on national level and political party official	Degree in Political Sciences	No
Greece	Minister of Tourism	June 2023	Politician and attorney	Degree in Law	No
Iceland	Director General	February 2022	not identifiable	Degree in Law	No
Ireland	Minister for Tourism, Culture, Arts, Gaeltacht, Sports and Media	June 2020	Politician and teacher	Degree in Music and English	No
Italy	Minister of Tourism	October 2022	Politician on national and regional level	Degree in Political Sciences	No
Luxembourg	Minister of Economy, SME, Energy and Tourism	December 2018	Politician and teacher	Degree in Education	No
Malta	Minister of Tourism	November 2020	Politician and Auditor	Degree in Accounting	No

Country	Responsible Governmental Position	Assumed current role in	Dominant prior activity	Education / Field of Study	Tourism industry roles or tourism education
Poland	Minister of Sports and Tourism	December 2023	Politician on national and regional level	Degree in Political Sciences	No
Portugal	Secretary of State for Tourism, Trade and Services	December 2022	Politician and Tourism Planning professional	Degrees in Tourism and Environment Management and Policy; PhD in Urban and Regional Development	Yes
Romania	Minister of Economy, Entrepreneurship and Tourism	June 2023	Politician with extensive prior experience in the construction industry	Degree in Mechanical and Electrical Engineering	No
Slovakia	Minister of Tourism and Sport	February 2024	Industry experience in banking, automotive and consumer industries	Degree in Commerce and Marketing	No
Slovenia	Minister of Economy, Tourism and Sport	January 2023	Politician on national and regional level	Education in Commerce	No
Spain	Minister of Industry and Tourism	November 2023	Politician on national and regional level	Degree in Business Administration	No
Switzerland	Head of Tourism Policy at SECO	May 2008	Researcher in regional development	Degree in Economics	No
UK	Minister of State for Media, Tourism and Creative Industries*	December 2023	Politician on national and regional level	Degree in Social and Political Sciences	No

* Corresponds to a Secretary of State in other Countries

Only the secretary of state in Austria and the minister of tourism and sports in Slovakia have extensive experience outside the political arena. So, there is a clear dominating preference for selecting tourism politicians based on their origins in the 'same stable'. Austria's secretary of state is also a double exception as she has an educational background in tourism. Despite this indicating a clear preference for tourism expertise, this may also lead to a strong connection between the tourism industry, social partners, and the political arena. Looking into the OECD (2022) overview, the latter seems to drive the political selection.

This observation is backed by the respective terms that position holders spent in the office. On average, the political position holders spent below two years with the political responsibility for tourism. Such a period is below the average time span between general elections in European countries (Plagakis, 2021). Hence, it is fair to state that the political personnel is reassembled with every change in government or governments remaining in office after an election. Therefore, the Swiss Head of Tourism Policy tends to be an exception, indicating that the position is more administrative than political (cf. Table 2). This is also backed by the self-description of the Department of Tourism Policy as a competence centre with policy preparation tasks (SECO, 2024)

5.2. Evaluation of NTO performance and reasons

Looking at the NTOs, it becomes evident that virtually all NTOs in the selected countries consider marketing and brand activities as a prime component of their responsibilities. Some of them are also responsible for other activities, either in the area of development or technology and digitalisation (cf. Table 2).

Table 2: National Tourism Organizations by Country

Country	NTO	Primary Activities	Budget 2022 (OECD, 2022)	Money spent per inhabitant	Money spent per incoming visitor
Austria	Austrian National Tourist Office	Marketing and Brand Management	24,000,000.00 €	2.65 €	0.92 €
Croatia	Croatian National Tourist Board	Marketing	37,800,000.00 €* [*]	9.80 €	2.47 €
Czech Republic	Czech Tourism	Marketing	48,900,000.00 €* [*]	4.58 €	6.66 €
Estonia	Estonian Tourism Board	Policy Implementation, Product Development, Marketing	11,500,000.00 €	8.53 €	5.31 €
Finland	Visit Finland	Marketing and Internationalisation	9,800,000.00 €	1.76 €	4.61 €
France***	ATOUT France	Marketing and Tourism Development	37,500,000.00 €	0.55 €	0.77 €
Germany	German National Tourist Board	Marketing and Data Management	39,000,000.00 €	0.47 €	1.37 €
Greece**	Greek National Tourism Organisation	Digital Visibility and Tourism Development	68,300,000.00 €	6.55 €	2.45 €
Hungary	Hungarian Tourism Agency	Marketing and Tourism Development	12,800,000.00 €	1.33 €	1.01 €
Iceland	Icelandic Tourism Board	Tourism Planning and policy support for regional development; monitoring, licensing and safety	4,600,000.00 €	12.04 €	6.68 €
Ireland	Tourism Ireland	Marketing and Business Support, Cultural Coordination	63,800,000.00 €	12.44 €	5.83 €
Italy	National Tourism Agency (ENIT)	Marketing and Brand Management	60,000,000.00 €	1.02 €	1.20 €
Latvia	Latvia Investment and Development Agency (Tourism Department)	Policy Implementation and Marketing	2,700,000.00 €	1.44 €	5.65 €
Lithuania	Lithuania Travel	Marketing and Tourism Development	4,000,000.00 €	1.41 €	1.84 €
Luxembourg	Luxembourg Tourism	Marketing	31,000,000.00 €	47.47 €	30.60 €
Malta****	Malta Tourism Authority	Marketing Policy Support and Tourism Development	108,000,000.00 €	203.35 €	47.22 €
Netherlands	Netherlands Board of Tourism and Conventions (NBTC)	Marketing and Tourism Development	9,200,000.00 €	0.52 €	0.57 €
Norway	Innovation Norway	Marketing and Tourism Development	15,500,000.00 €	2.84 €	3.11 €
Poland	Polish Tourism Organisation	Marketing	13,000,000.00 €	0.35 €	0.18 €
Portugal	Tourismo de Portugal	Marketing and Regional support	343,000,000.00 €* [*]	32.70 €	21.03 €

Country	NTO	Primary Activities	Budget 2022 (OECD, 2022)	Money spent per inhabitant	Money spent per incoming visitor
Slovakia	Slovakia Travel	Marketing and Data Management	1,200,000.00 €*	0.22 €	0.21 €
Slovenia	Slovenia Tourism Board	Marketing, tourism development, data management	16,000,000.00 €	7.58 €	4.07 €
Spain	Turespana & Segittur (functional division)	Marketing (Turespana); Technology Development, Knowledge and Innovation management and research (Segittur)	130,000,000.00 €	2.72 €	1.81 €
Sweden	Visit Sweden	Marketing	9,400,000.00 €	0.90 €	1.42 €
Switzerland	Switzerland Tourism	Marketing and Regional Cooperation	70,000,000.00 €	7.98 €	7.64 €
UK	British Tourism Authority	Marketing and Quality Improvement	40,000,000.00 €	0.60 €	1.30 €

*Figures for 2021; ** figures for 2020; *** figures for 2020 as of (OECD, 2020); **** figures from (Borg, 2023)

According to the figures available, the budgets range from as little as 1.200.000 EUR in Slovakia to 343.000.000 EUR in Portugal. Combined, they average approximately 47.500.000 EUR (34.700.000 EUR excl. Portugal). The Portuguese figures result from a unique set-up in the respective tax regulations (OECD, 2022). Normalising the numbers by the inhabitants or visitors, the data clearly displays a huge impact of currency exchange rates towards the Euro. Additionally, smaller countries have to spend larger amounts per inhabitant and subsequently also per visitor. Finally, the NTO's development-related tasks seem to drive parts of the respective budget.

The budgets of the NTO correspond with the success of international tourism activities. In a nutshell, the money availability of a specific NTO corresponds to the country's success in the international tourism market based on international visitor numbers (cf. Figure 3). The ITIR correlates positively to both the NTO budget per inhabitant ($\rho = 0.591$; $p < 0.002$) and the NTO budget per incoming international visitor ($\rho = 0.458$; $p < 0.02$).

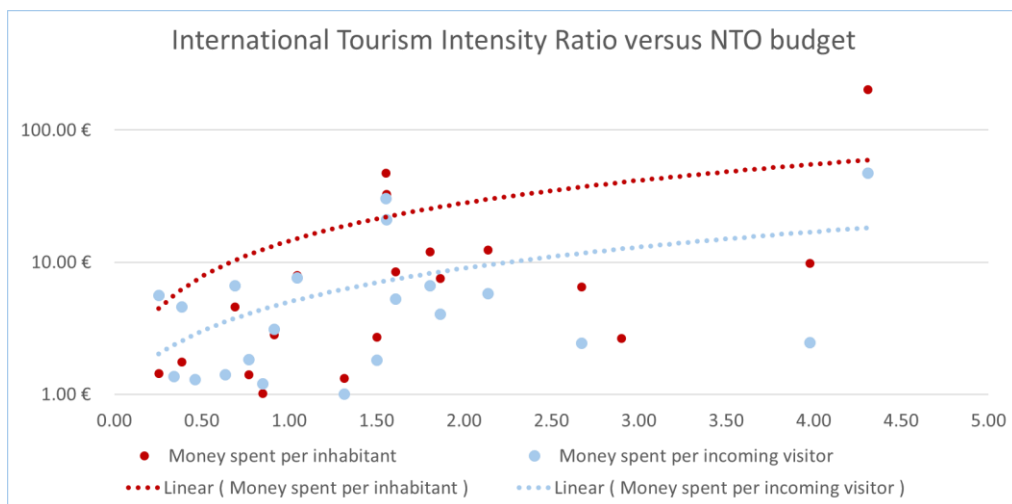


Figure 3. *International Tourism Intensity in relation to NTO budget*

The differences between the two values may indicate the effects of economy of scale on the respective marketing spending. Attracting international tourist streams also involves being present in the respective source markets. Such a presence involves either owning offices or appointing representatives (cf. Gössling *et al.*, 2024), resulting in a certain level of fixed budget allocation to such activities.

Apart from Malta, which enjoys the highest ITIR on the expense of high NTO spending, the second to fourth highest ITIR countries, Croatia, Austria, and Greece, seem to achieve a very cost-effective result from the NTO budgets, which speaks for the economy of scale effects. The exception of Malta may be explained by an assumed mismanagement of the NTO over the last decade (Borg, 2023). Another country that appears to overspend on NTOs is Portugal, where the budget comes from the already-mentioned tax system and is also used for regional development measurements. Also, Luxembourg seems to have a disproportionally high spending on the NTO. However, given the size of Luxembourg, the NTO budget is likely to cover costs that belong to regional expenses in other countries.

In contrast to the political leaders, the heads of a NTO are appointed based on their tourism experience. At least the majority of them enjoy tourism-related expertise, either from education or work experience (cf. Table 3). This allows the assumption that competencies and skills appear to be more important in the hiring process. Exceptions to this general assessment appear to result from either political decisions or relate to the respective structure of the NTO. Regardless of the specific experience, all non-political heads without tourism-related work or education experience have a background in the private sector relating to communication or other relevant aspects.

Table 3: *Head of NTO experience*

NTO	Head of NTO in charge since	Dominant prior position experience	Education	Tourism Experience previous to heading NTO
Austrian National Tourist Office	May 2023	Marketing in Tourism and Hospitality	Degree in International Business Relations	Yes
Croatian National Tourist Board	July 2017	Hospitality Industry Positions	Degree in Management and Organization	Yes
Czech Tourism	November 2023	Foreign Trade and Marketing Representative and Czech Tourism	Degree in Sinology	Yes
Estonian Tourism Board	August 2022	Urban Development and Tourism Planning	Degrees in Public Administration and Cyber Security	Yes
Visit Finland	January 2021	Media and Communication, Destination Marketing	Degree in Business Administration	Yes
ATOUT France	June 2020	Politics related positions	Degree in Engineering	No
German National Tourist Board	November 2003	Culture and trade	Degree in Business Management and Social Sciences	No
Greek National Tourism Organisation	August 2019	Politician with a focus on Tourism and Culture	Degrees in Architecture and Political Communication	Yes
Hungarian Tourism Agency	January 2024	Hungarian Tourism Agency	not specified	Yes
Icelandic Tourism Board	March 2023	Tourism industry and research	Degree in International Marketing and Tourism Studies	Yes
Tourism Ireland	September 2023	Tour guide and IT-related Marketing	Degree in Irish and English Literature	Yes
National Tourism Agency (ENIT)	November 2022	Incoming and Travel Agencies	not specified	Yes

NTO	Head of NTO in charge since	Dominant prior position experience	Education	Tourism Experience previous to heading NTO
Latvia Investment and Development Agency (Tourism Department)	October 2023	Several managerial positions	Degree in Business Administration	No
Lithuania Travel	December 2022	Several positions in the Lithuanian state department of tourism	Degree in Business Administration	Yes
Luxembourg Tourism	October 2018	Association positions in trade and tourism	Degree in Media Studies and Economics, PhD in Germanistic and Communication Studies	Yes
Malta Tourism Authority	June 2022	Several positions in the Malta Tourism Authority	Degree in Marketing	Yes
Netherlands Board of Tourism and Conventions (NBTC)	February 2019	Several political positions	Degree in Public Administration	No
Innovation Norway	May 2019	Several political and industry positions with focus on professional development	Degree in Law	No
Polish Tourism Organisation	April 2022	Several political and industry positions with focus on tourism and physical education	Degree in Physical Education	Yes
Tourismo de Portugal	June 2023	Several positions within tourism associations	Degrees in Law and Finance	Yes
Slovakia Travel	April 2021	Several positions in radio and television	Degree in Economics and Management	No
Slovenia Tourism Board	June 2022	Hospitality Positions and positions within the Slovenian Tourist Board	Degree in Economics and Entrepreneurship	Yes
Turespana	July 2020	Marketing and Tourism Positions for the City of Madrid	Degree in Politics and Economics	Yes
Seggitur	July 2018	Political positions within the Ministry of Industry, Tourism and Trade, various positions in telecommunication and urban planning	Degrees in Political Science and Sociology, as well as Public Management	Yes
Visit Sweden	January 2022	Several Hospitality Positions	Degree in Marketing and Economics	Yes
Switzerland Tourism	January 2018	DMO-related positions, as well as positions within Switzerland Tourism	Degrees in Tourism as well as Strategic marketing	Yes
British Tourism Authority	April 2022	Journalist with long experience in Visit Britain	Degree in Nuclear Physics	Yes

In this respect, personal qualifications and competencies appear more relevant than a political background. Hence, qualifications and experience seem to be more relevant to those positions than political background. Most of the NTO executives have previous experience in tourism, either from their educational or professional backgrounds. The heads of the Icelandic and Swiss NTOs even have both professional experience and a tourism education background. Those without tourism experience either have a political background (France and Netherlands) or come from other industries. For Norway,

this is explainable, as the NTO is not exclusively focused on tourism. The only executive heading tourism with a background in neither tourism nor politics is the Slovakian NTO head.

Netherlands and France seem to represent exceptions as the respective NTO heads have political backgrounds. Looking closer into the structure, the NTO head might also have a dominant political function in the Netherlands as there is no official national tourism politician representing tourism in the government. (cf. Table 1). For France, the politicisation of the NTO may be driven by a strong interaction between various political players and actors (OECD, 2022) or a rather generic tendency to select leading personnel in state-related functions based on similarities in backgrounds (cf. Van Zanten & Maxwell, 2015). However, most countries tend not to politicise the selection of NTO executives. This is also backed by the fact that almost a third of the NTOs' heads have been in office for time spans that exceed legislative periods. Hence, it is fair to assume that they enjoy a higher level of independence in their decisions, regardless of the political composition of the government.

Experience and expertise appear to also positively impact the performance and success of an NTO. Countries that employ a head of the NTO with a tourism-related background also enjoy a higher number of international visitors (cf. Figure 4). The ITIR positively and significantly correlates with the experience of the head of the respective NTO ($\rho = 0.411$; $p < 0.05$).

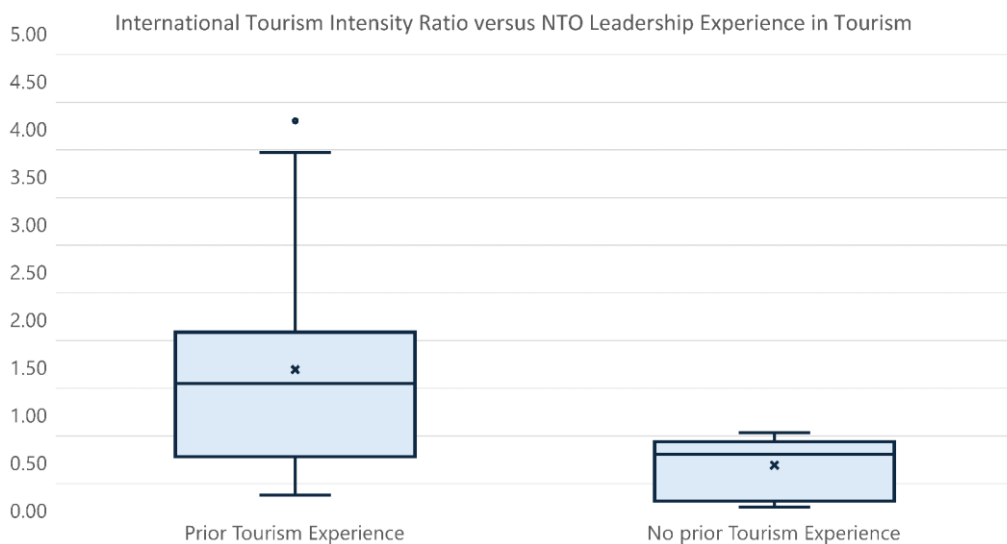


Figure 4. *International Tourism Intensity Ratio in relation to Tourism related experience of the head of NTO*

This observation suggests that the emphasis on tourism experience in NTO leadership is a proxy for the importance of tourism experience in various facets of the country's political activities. Tourism as a phenomenon may experience a higher level of appreciation in those countries.

6. Discussion

In contrast to the research of Pjanić and Mitrašević (2020), international tourism performance and the GDP impact of tourism are interlinked. However, economic performance does not steer political importance. It is dependent on the ITIR. Hence, it is tourism visibility to the population that steers political decisions regarding the importance of tourism. This speaks for an existing political perspective on tourism beyond a pure GDP one (Dwyer, 2023). As the NTO budgets also correspond to the ITIR of

the respective country, this can be seen as an endorsement of the existing marketing-related performance evaluation of the NTO (Akehurst *et al.*, 1993; Koh & Fakfare, 2019; Oklevik *et al.*, 2019). This shall not rule out the dominance of content-related political perception, especially in Western Europe, where it is an economic one (Keller, 2015; Vogler, 2022), but it illustrates the various facets academia needs to consider in tourism policy-related fields.

The findings also suggest that personal competencies are a success factor in dealing with tourism-related aspects from a rather political perspective. This confirms the necessity of possessing a high level of personal competencies (Dredge, 2006; Fayos-Solà & Alvarez, 2014). From a political perspective, a different set of competencies appears at the forefront of consideration. Like with any other political position, there may be a competitive advantage of expertise (Dal Bó *et al.*, 2017), but those are not necessarily linked to the tourism domain. In fact, those political positions in tourism may well be appointed based on political preferences that are irrespective of tourism as an industry or phenomenon (cf. Stevenson *et al.*, 2008; Vogler, 2022). This can be acknowledged as proof of the political ideology of the governing parties shaping the decisions for tourism politics (Webster & Ivanov, 2012).

7. Conclusion

The political importance of tourism is defined by societal aspects and not the economy alone. Tourism issues find their way into governmental debates by their societal visibility. Societies with a higher level of tourism intensity may perceive tourism as a more visible aspect and hence 'call' for a stronger political consideration of tourism. In other words, the more tourists, especially international ones, shape society's views on and experiences with tourism, the more likely governments will address the rising issues on a higher national level. However, the institutional area of addressing tourism issues on a national level is predominantly linked to economic aspects, which suggests that politicians' content-related perceptions are economic-driven. Exceptions to this can be explained by historical and geographic clusters of countries, without neglecting the importance of economic aspects.

Looking at the personnel structure at the national level, one can see that tourism policy is a political issue. European governments tend to seek at least a certain level of influence on tourism activities by appointing ministers and secretaries from the political arena or by ensuring political representation at the NTO. This may be a budgetary representation. A direct representation, like in France and the Netherlands, can be achieved by appointing politicians directly as executives. In summary, the perception of tourism appears to be linked to economic aspects. Still, European governments tend to keep control over tourism politics and foster a political approach to tourism compared to an economic one. Economic considerations are delegated to the NTO level, where tourism experience and expertise are valued and measured by economic aspects.

Further research should build on the politicisation questions and address the mechanism of the appointment procedures and the value perception of tourism for governments in general. Additionally, the impact of political activities on the NTO and tourism policy formulation should be addressed to complement this very first broad assessment.

8. Implications

Apart from the political assessment, the studies shed some light on rather practical implications resulting from a close link between the amount of money spent by the government on national tourism activities and the corresponding international tourism intensity. In light of over- and under-tourism discussions, the budgetary aspects may become a steering tool for addressing and influencing the international tourism streams towards the country. From a budgetary perspective, it appears reasonable to adjust the NTO budget so that it a) fulfils the possible functions in marketing and tourism development and b) achieves economies of scale effects to create a cost-efficient NTO structure.

However, this may drive additional tensions between tourists, the tourism industry, local society, and residents.

Regardless of how the money is spent, having competent personnel available at the governmental level or subsequent institutions is crucial. The research shows that countries that value the competencies of their personnel responsible for orchestrating tourism on a national level enjoy a higher number of international visitors.

However, it is unclear whether having tourism expertise leads to an increase in tourism or if it requires a higher level of competency to manage it effectively. Therefore, one of the main contributions of knowledge is the evaluation of competency-related effects, which should serve as a starting point for further analysis of competency-related effects. Such effects are useful in addressing problems and challenges arising from tourism and in structuring and leading tourism development activities in general.

Appendix

A Country Overview

Country	Responsible Governmental Department / Ministry (derived from governmental websites)	GDP % (WTTC, 2023)	Residents 2022 (World Bank, 2024)	Domestic Visitors 2022 (UNWTO, 2023)	International Visitors 2022 (UNWTO, 2023)	Total Visitors 2022 (UNWTO, 2023)	TIR	ITIR
Austria	Federal Ministry of Labour and Economy	9.5%	9,041,850	13,420,000	26,215,000	39,635,000	4.38	2.90
Belgium	No national governmental department	4.7%	11,685,810	9,406,000	8,220,000	17,626,000	1.51	0.70
Bulgaria	Ministry of Tourism	6.5%	6,465,100	4,132,000	5,557,000	9,689,000	1.50	0.86
Croatia	Ministry of Tourism and Sport	25.8%	3,855,600	3,148,000	15,324,000	18,472,000	4.79	3.97
Cyprus	Deputy Ministry of Tourism	12.2%	1,251,490	n/a	1,937,000*	n/a	n/a	1.55
Czech Republic	Ministry of Regional Development	4.0%	10,672,120	26,149,000	7,343,000	33,492,000	3.14	0.69
Denmark	Ministry of Industry, Business and Financial Affairs	5.7%	5,903,040	20,694,000	14,190,000	34,884,000	5.91	2.40
Estonia	Ministry of Economic Affairs and Communication	8.7%	1,348,840	2,640,000	2,166,000	4,806,000	3.56	1.61
Finland	Ministry of Economic Affairs and Employment	6.7%	5,556,110	2,710,000	2,127,000	4,837,000	0.87	0.38
France	Ministry of Economy and Finance	8.2%	67,971,310	201,310,000	48,395,000*	249,705,000	3.67	0.71
Germany	Ministry of Economic Affairs and Climate Action	8.8%	83,797,990	135,069,000	28,463,000	163,532,000	1.95	0.34
Greece	Ministry of Tourism	18.5%	10,426,920	5,990,000	27,863,000	33,853,000	3.25	2.67
Hungary	Cabinet Office of the Prime Minister	6.6%	9,643,050	12,499,000	12,649,000	25,148,000	2.61	1.31
Iceland	Ministry of Culture and Business Affairs	7.8%	382,000	n/a	689,000*	n/a	n/a	1.80
Ireland	Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media	3.0%	5,127,170	5,663,000*	10,951,000**	16,614,000	3.24	2.14
Italy	Ministry of Tourism	10.2%	58,940,430	43,996,000	49,811,000	93,807,000	1.59	0.85
Latvia	Ministry of Economy	6.4%	1,879,380	2,828,000	478,000*	3,306,000	1.76	0.25

Country	Responsible Governmental Department / Ministry (derived from governmental websites)	GDP % (WTTC, 2023)	Residents 2022 (World Bank, 2024)	Domestic Visitors 2022 (UNWTO, 2023)	International Visitors 2022 (UNWTO, 2023)	Total Visitors 2022 (UNWTO, 2023)	TIR	ITIR
Lithuania	Ministry of Economy and Innovation	4.2%	2,831,640	3,595,000	2,169,000	5,764,000	2.04	0.77
Luxembourg	Ministry of Economy, SME, Energy and Tourism	8.5%	653,100	155,000	1,013,000	1,168,000	1.79	1.55
Malta	Ministry of Tourism and Public Cleanliness	12.6%	531,110	369,000	2,287,000	2,656,000	5.00	4.31
Netherlands	Ministry of Economic Affairs and Climate Policy	9.4%	17,700,980	21,490,000	16,063,000	37,553,000	2.12	0.91
Norway	Minister of Trade, Industry and Fisheries	6.2%	5,457,130	21,780,000	4,979,000	26,759,000	4.90	0.91
Poland	Minister of Sport and Tourism	4.0%	36,821,750	51,702,000	71,817,000	123,519,000	3.35	1.95
Portugal	Minister of Economy and Maritime Affairs	15.8%	10,490,700	19,969,000	16,308,000	36,277,000	3.46	1.55
Romania	Minister of Economy & Entrepreneurship, Tourism	5.5%	19,047,010	16,261,000	12,697,000	28,958,000	1.52	0.67
Slovakia	Ministry of Tourism and Sport	4.6%	5,431,750	n/a	5,630,000**	n/a	n/a	1.04
Slovenia	Minister of Economy, Tourism and Sport	9.2%	2,111,990	2,773,000	3,936,000	6,709,000	3.18	1.86
Spain	Ministry of Industry, Trade and Tourism	13.6%	47,778,340	147,713,000	71,659,000	219,372,000	4.59	1.50
Sweden	Ministry of Climate and Enterprise	6.7%	10,486,940	n/a	6,629,000	n/a	n/a	0.63
Switzerland	State Secretariat for Economic Affairs SECO	6.3%	8,775,760	7,168,000	9,160,000	16,328,000	1.86	1.04
UK	Department for Culture, Media and Sport	9.5%	66,971,400	n/a	30,741,000	n/a	n/a	0.46

*2021 figures; **2019 figures

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