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FACULTY OF ECONOMICS

MASTER'S THESIS

**ANALYSIS OF DESTINATION BRANDING EFFECTIVENESS:
CASE OF KAZAKHSTAN**

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AUTHORSHIP STATEMENT

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INTRODUCTION

Over the last few decades tourism contribution to the world economy was consistently increasing. In fact, it generated 10.2% of global gross domestic product (US \$7.6 trillion) in 2016. Furthermore, the forecast predicts the 3.7% industry annual growth by 2027 (World Travel & Tourism Council, 2017b). Such business attractiveness of tourism industry makes the competition for the potential tourists between destinations increasingly intense and tough. As a result, the number of destinations that heavily invest in branding themselves to be appealing travel choice is growing.

It is evident for tourism managers that the more attractive is the destination brand, the more likely this destination will be visited by tourists (Cai, 2002; Anholt, 2005). More importantly, destinations that compete for the same travel segments need to develop a proper branding strategy to differentiate among one another. Hence, the weaknesses and strengths of own destination brand should be known by destination marketers (Morgan, Pritchard, & Piggot, 2002; Konecnik, 2010).

Acquiring such knowledge represents considerable challenge due to the intangible character of branding results (Keller, 1998; Kapferer, 2004). Destination stakeholders generally find it hard to measure the effectiveness of implemented branding programs (Gartner, Konecnik, & Ruzzier, 2011). Doubtless, the correct evaluation of branding process effectiveness is critical, since it helps to reveal inefficient branding efforts, provide useful insight for the marketing improvement and increase competitiveness of the destination.

In addition, this research field lacks universal approach to the analysis of destination branding effectiveness. Albeit, vast majority of existing studies define whether destination branding is effective or not through assessment of the customer-based brand equity (Pike, 2007; Konecnik & Gartner, 2007; Gartner, 2009; Bianchi, Pike, & Lings, 2014). So the main focus is solely on the demand side of the branding process. However, it is necessary to note that quality of industry stakeholders' relationships and marketing congruence directly influences effectiveness of the destination branding as well. Therefore, it is important to include supply side into the assessment of destination branding effectiveness.

There are several conceptual studies devoted to the role of the industry stakeholders in destination branding (Tasci & Gartner, 2005; Konecnik & Go, 2008; Konecnik & Ruzzier, 2009; Saraniemi, 2010). Yet, there is a lack of empirical examination of the stakeholders' marketing activities with respect to destination brand. Thus, there is a clear need for a more detailed evaluation of the effectiveness of destination branding from the supply point of view.

The purpose of this study is to evaluate branding effectiveness of Kazakhstan as a tourism destination using supply-side focused approach.

To accomplish that, three branding concepts derived from the extensive literature review were used, namely **(1) desired brand identity, (2) communicated brand identity and (3) umbrella branding**. The combination of these concepts ensures proper empirical examination of destination branding efforts of industry stakeholders.

The study provides an assessment of the destination branding effectiveness in the case of Kazakhstan focusing on the supply side of branding process. The reason why is that there is already a considerable contribution made by existing studies with respect to the destination brand equity (demand side), while the evaluation of branding efforts from the supply side point of view is underdeveloped.

The choice of the country is based on the fact that there are no existing in-depth destination brand studies dedicated to Central Asian region. Kazakhstan is the biggest country in the region in terms of territory, tourist visitation and tourist expenditures.

This study sets the following **research question**:

- **How effective is branding of Kazakhstan as a tourism destination from the perspective of supply side?**

In order to get a proper answer to this research question, several elements of destination branding must be assessed. Therefore, three sub-questions are outlined:

1. How homogeneous is communicated brand identity among critical tourism stakeholders?

Study findings of how do stakeholders portray the destination will help to conclude whether marketing message is overall diffusive or focused. If it is diffusive, it will indicate that quality of the cooperation between stakeholders in promotion of the destination is low. Additionally, it will mean that potential visitors receive contradictory marketing messages about the destination which eventually decreases branding effectiveness.

2. What is the gap between the desired brand identity possessed by industry stakeholders and communicated brand identity promoted by national destination management organisation?

It is necessary to assess since it will demonstrate if stakeholders' desired destination identity is different from how it is really promoted by national destination management organisation (hereinafter: DMO). In case the gap between desired and communicated brand

identities exists, it will imply the lack of collaboration and failure of communication channels. Consequently it reduces the effectiveness of destination branding process.

3. Are regional destinations and tourism businesses promoted under national umbrella brand strategy?

Answering this question will determine whether certain cohesion exists between tourism businesses, local and national destination management organisations. In case such collaboration takes place, stakeholders will experience significant synergy effect from the collaborative branding which increases effectiveness of destination branding.

In general, master thesis has the following structure. Introduction shows relevance of the study and explains a research question. Chapter 2 gives an explanation of the branding, destination brand definition and brand equity dimensions. Furthermore, chapter highlights earlier research related to assessment of destination branding effectiveness. It also points out critical research problems in this field.

The literature review is followed by tourism industry review and tourism statistics of Kazakhstan (Chapter 3). Chapter 4 focuses on detailed description of research methods (data collection and its analysis). Specifically, it presents a survey design including interview questions to the representative of national DMO, clarifies the process of content analysis and explains the procedures of network analysis..

The last chapter has several paragraphs that focus on the discussion of the research results (Chapter 4). First paragraph explains the outcomes of the content analysis, provides an insight on Kazakhstan's communicated brand identity and concludes on the effectiveness of the destination identity attributes communication. In the second paragraph, stakeholders' agreement with currently promoted Kazakhstan identity traits is evaluated. Additionally, paragraph presents brand identity attributes desired by stakeholders. In the end, it outlines main features of desired - communicated identity gap. Results of network analysis with umbrella branding evaluation are presented in third paragraph. For each network, critical umbrella brand attributes are identified. Additionally, for each sub-brand – national brand assessment, significant points of deviation are highlighted. Paragraph ends with analysis of commonalities in visuals used by industry stakeholders to represent Kazakhstan. The last section of the chapter outlines research limitations and areas for further research.

Chapter 5 specifies main contribution of the thesis to the research field. It is followed by the summary of the key findings.

The study additionally provides the list of references and a few appendixes.

1 LITERATURE REVIEW

1.1 Definition of destination brand and its main concepts

There is no doubt that branding is an essential tool of destination management. However, historically the terms “brand” and “branding process” were used in manufacturing industry for consumer goods and then in services (Kapferer, 1997).

Aaker (1991) defines brand as an **identifier** of the goods and services of either one seller or a group of sellers and as **differentiator** of a particular good or service from its competitors. According to Nielsen (1995), Biel (1997) and Berry (2000) brand is a tool for **advertising** and **promoting** differentiated perception of the product or service in the market.

Kotler’s (1998) understanding of the brand is similar to the two previous. He determines brand as a **name, sign, symbol**; or **design** or combination of them that fulfils the functions of **identification** of the product and **differentiation** of it from the competitors.

Content analysis of brand literature performed by de Chernatony and Riley (1998) revealed 12 main brand meanings.

Table 1. Brand Definitions

Brand meaning	Explanation
As a logo	Differentiates brand by name and visual identity.
As a legal tool	Represents legal ownership over brand trademark to protect it from imitators.
As a company	Brand symbolizes company’s personality.
As a shorthand	Consumer’s tool for quick recall of information and prompt purchase decision.
As a risk reducer	Guarantees quality and reduces performance risks.
As an identity system	It relates to desired brand positioning (viewed as a holistic concept).
As an image	Consumers’ perception of the brand.
As a value system	Brand represents unique cluster of values relevant to consumer.
As a personality	Association with the kind of people using the brand.

table continues

continued

Brand meaning	Explanation
As a relationship	Brand is an expression of relationship between consumer and the company.
As adding value	Non-functional benefits beyond brand's tangible characteristics.
As an evolving entity	Brand evolves from simple product to brand policy.

Source: L. de Chernatony & D. Riley, *Defining a brand: beyond the literature with experts interpretations*, 1998, pp. 418-424.

It is also important to note that the brand can be conceptualized in two ways:

1. Brand understanding in **managerial** (brand identity) or **customer perspective** (brand image). Both concepts are interrelated and critical for the brand analysis (Kapferer, 2004; Konecnik, 2010).

2. Brand understanding as **functional** or **synthesis entity**. The first one views brand as an entity limited to tangible functions like differentiating its products from competitors and protecting the legitimate rights of individuals (organizations). From the synthesis point of view, brand represents not only a name or logo, but also various expectations and associations derived from the customer's experience with a particular brand (Davis, 2002).

The definition of the destination brand is fundamentally derived from the definition of the product brand. In general, researchers tend to agree that destinations can be viewed as brands because they have the capacity to fulfil the same roles as product/service brands. For example, destination branding might be put into practice as the way of **identification, signal of quality, risk reducer, promise device or differentiation tool** (Keller, 1998).

Ritchie and Ritchie (1998) defined destination brand as a **name, symbol, logo, word mark** or other graphic that both identifies and differentiates the destination. It also promises a memorable travel experience and ensures strong recollection of the destination experience.

According to Blain, Levy and Ritchie (2005) the above definition describes the brand from a seller's perspective. Therefore, complete definition should include consumer's point of view as well. For consumers brand is a signature of the diligent service, high quality of the product. Besides, it saves the time that customers spent in search of the reliable service. They finalised definition of the destination brand including both perspectives: “ ...a name, symbol, logo, word mark or other graphic that both identify and differentiate a destination; (2) that convey the promise of a memorable travel experience that is uniquely associated with the destination; and (3) that serve to consolidate and reinforce the recollection of pleasurable memories of the destination experience, all with the intent purpose of creating

an image that influences consumers' decisions to visit the destination in question, as opposed to an alternative one." (Blain et al., 2005, p. 331-332)

Morgan et al. (2002) analyzed famous "the 100% Pure New Zealand" brand and concluded that strong destination brand should have **emotional meaning**, great conversation value and provide high anticipation for potential tourists.

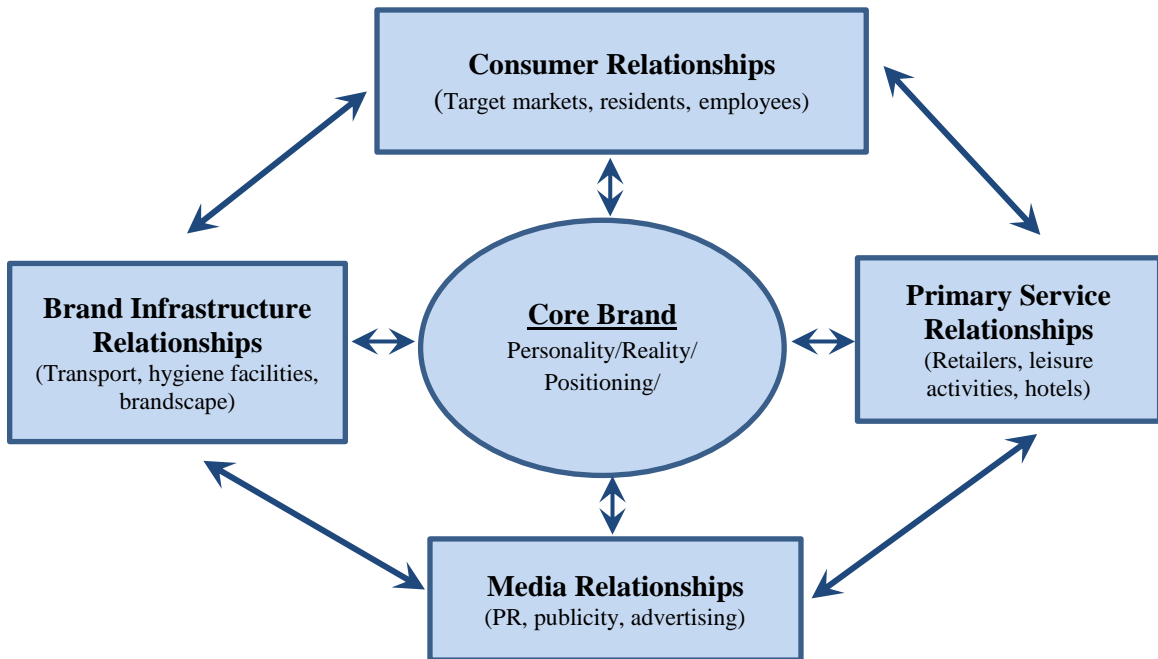
Given that both product brand and destination brand definitions incorporate meanings of identification and differentiation, it is necessary to note several crucial differences between product and destination brands. Unlike products, destinations are **dynamic places** and change depending over time due to political, economic and socio-cultural changes, which have to be taken into account. Secondly, the **experiential character** of the destinations means the final outcome or satisfaction is different from consumer to consumer. Thus, the delivery of what is promised in marketing campaign in a proper way to each tourist is critical for the support and development of destination brands (Gartner, 2009).

In addition to this, dissimilar to product and service brands, travelling to destination is complex experience and is influenced by many volatile variables. In many cases they are not under control of organisations responsible for destination management. This visible **low control of visitor experience** might be one of the factors why in some countries destinations are prevented to become brands. Evidently it demands certain level of guarantee of high quality experience delivery (Morgan et al., 2002).

One of the first conceptual frameworks related to destination branding was introduced by Hankinson (2004). In his concept of brand networks, place branding is responsible for four functions. Firstly, it sees brands as **communicators**. Meaning that they are the sign of ownership and instrument of product differentiation. Secondly, brands are regarded as **perceptive reflections** of customer profile. It includes customer senses, motivation and emotions. Thirdly, brands carry out the role of **enhancing the value of the place**. Last but not least, brands symbolize **relationships** in a sense that they have their own personality. That personality enables them to build and maintain meaningful relationships with the customers.

In short, Hankinson's (2004) framework reviews destination as a correlation of brand networks. In this framework, place brand consists of four categories of relationships. First category refers to public relationship and advertising. Primary service relationship includes core tourist services like accommodation, leisure and entertainment. Tourism supporting services (transportation, environmental organisations) represent brand infrastructure relationships. Finally, consumer relationships contain information on brand target markets, employees and residents (Figure 1).

Figure 1. Places as Relational Brand Networks



Source: G. Hankinson, *Relational network brands: towards a conceptual model of place brands*, 2004, p. 115.

According to Blain et al. (2005, p. 330), destination brand “provides visitors with an assurance of quality experiences, reduces visitor search costs, and offers a way for destinations to establish a unique selling propositions.” Given that, the definition of the destination brand incorporates the notion of authentic travel experience and information about destination that is easy to use and access.

A two-dimensional approach to conceptualise the definition of destination brand has been suggested by Konecnik and Ruzzier (2009) who argue that brand identity is a necessary condition for evaluating destinations from visitors’ point of view (Figure 2).

Figure 2. A Two-Dimensional Approach to Destination Branding



Source: M. Konecnik & M. Ruzzier, *A two-dimensional approach to branding: integrating brand identity and equity*, 2009, p. 69.

According to their model, firstly, destination brand identity is created. Then marketing function is responsible for communicating a desirable image to potential visitors. Lastly, brand equity contains information on how destination is perceived. In the areas where gap exists, marketing strategies should be put into action. Image in this model is extended to brand equity (Konecnik & Ruzzier, 2009) . Both dimensions are closely interrelated and represent supply and demand side stakeholders with respect to destination brand.

Tasci and Gartner (2009) developed a practical framework for destination branding. According to them, destination brand is created from the interception of supply and demand side brand meanings. Supply-side incorporates destination identity and image projected by destination, while demand-side is comprised of image and identity received by perceivers. The mix of the brand meanings creates strategic destination brand. It takes different visual forms. When the brand is formed as an entity, its perception, value, knowledge by consumers can be measured. Consequently the concept of the brand equity becomes operational. In addition, it is significant to underline that brand identity and brand equity are correlated in this framework. In other words, destination brand is seen as an outcome of supply-side and demand-side brand meanings. Generally, brand takes a form of a name, logotype, colour, slogan and tour packages, on the basis of which one is able to manage destination brand equity (Figure 3).

Figure 3. Strategic Destination Brand

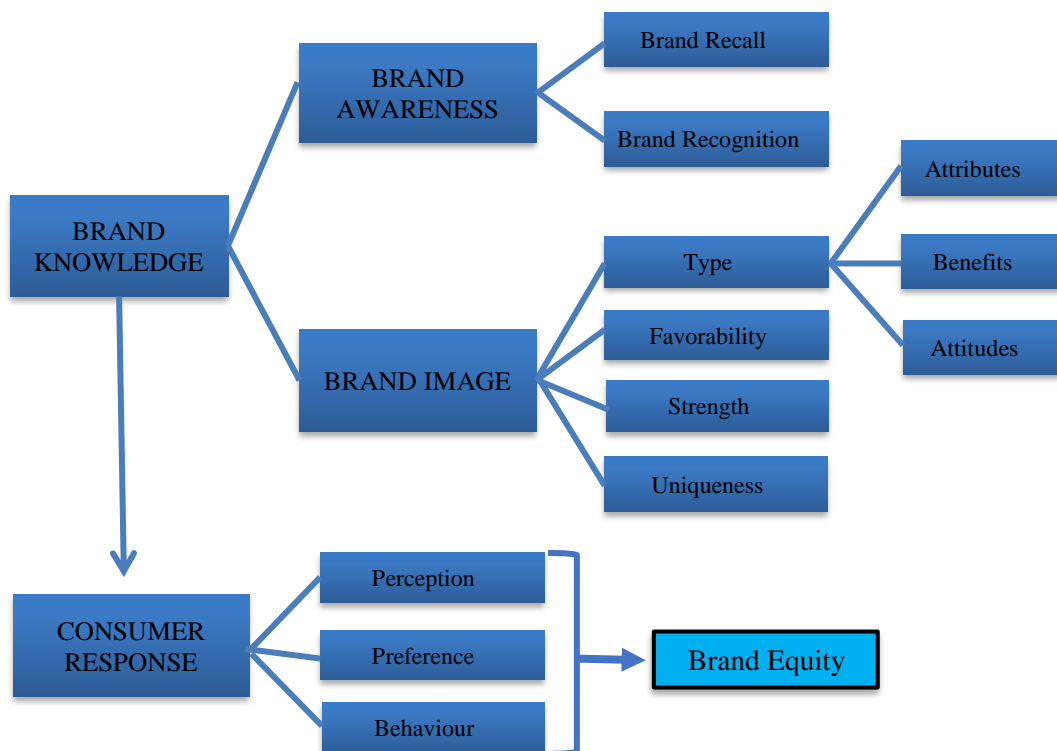


Source: A.D.A. Tasci & W.C. Gartner, *A practical framework for destination branding*, 2009, p. 157.

Brand equity is a critical notion in product/service and destination brand studies. The definition of the brand normally lacks the inclusion of consumers' perception of the brand dimensions as well as the measurement of the brand value. For this reasons, the concept of the brand equity was developed. One of the first definitions of brand equity was determined as consumer brand associations that can be either favourable or not (Kamakura & Russell, 1994).

Keller (1993, p. 8) defines customer-based brand equity as “the differential effect of brand knowledge on consumer response to the marketing of the brand”. This definition operates with four concepts: (1) **brand knowledge**, (2) **brand awareness**, (3) **image** (associations) and (4) **consumer response** (preference). Keller outlines brand knowledge as a combination of brand awareness and brand image. Level of a brand knowledge influences consumer response to the product/service. It includes consumer perceptions, preferences and behaviour towards the brand. Fundamentally, consumer reaction to branding activities forms a brand equity (Figure 4).

Figure 4. Customer-Based Brand Equity by Keller



Source: K.L. Keller, *Conceptualizing, measuring, and managing customer based brand equity*, 1993, p. 7-8.

The ability of consumers to identify the brand under different conditions constitutes the construct of brand awareness. In turn, awareness consists of brand recognition and brand recall. Brand recognition is the capacity of the consumer to state that brand was seen or heard previously. Brand recall examines how well customers retrieve the brand when a particular product category is presented to them (Keller, 1993). Concerning brand image that represents consumer perceptions about the brand, Keller states that it consists of association types, their favorability, strength and uniqueness. Types of associations include three elements, namely attributes, benefits and attitudes. Attributes describe a given product or service, while benefits represent personal advantages and values that consumers extract from the product. Brand attitudes display general evaluation of the brand by consumers.

As for the role of the brand equity, Keller (1993) argued that when high brand equity is created, it leads to improvement of communication efficiency, reduces marketing costs and increases the influence on purchasing decisions. It is also highlighted that consumer-based brand equity assists in finding what knowledge do consumers possess in relation to brands. It is extremely useful in managerial decision making. In comparison, Aaker (1997) regarded brand equity as a source of sustainable competitive advantage and defined it as **value provider** to customers. For example, brand equity enhances information interpretation, increases confidence in purchase decision and satisfaction from the consumption. Aaker's brand equity concept consists of the following dimensions: **loyalty, name awareness, perceived quality, brand associations and brand assets** like patents and trademarks.

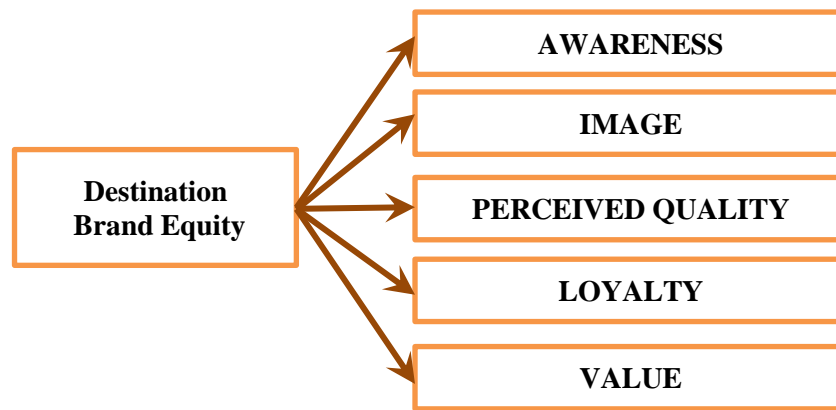
Brand loyalty prevents potential vulnerability from the competitors' actions. Name awareness ensures inclusion of the brand into consideration by consumer with respect to purchase decision making. Perceived quality impacts consumer choice, provides opportunities to set a premium price, whereas brand associations are used as an input in brand and marketing management. Also, wide brand associations may become the fundament for the brand extension (Aaker, 1991).

It is important to note that four dimensions of the brand equity are used more frequently in brand equity literature than others, namely brand awareness, perceived quality of the brand, brand associations and brand loyalty (Aaker and Joachimsthaler, 2000). As for types of brand equity research, Tasci and Denizci (2009) concluded that it largely consists of **consumer perceptions** analysis (awareness, image, perceived quality, personality) and **consumer behaviour** analysis (loyalty, desire to pay premium price).

Brand equity concept was applied to destination brands as well. According to Pike (2007), brand equity studies are the most developed field of research in destination branding. However, for a long time scholars used to define and analyse destination brand only from the perspective of the destination image only. Loyalty and quality were viewed as separate entities (Gartner, 2014).

In the brand equity study of Slovenia and Austria, Konecnik and Gartner (2007) argued that customer-based destination brand equity should consist from several dimensions, namely quality, loyalty, awareness, value and image. Altogether these dimensions comprise destination brand equity. Mentioned dimensions change their level of importance depending on the market segment. For the renewal markets (first time and potential visitors) awareness and image were more significant in destination selection. In contrast, for the repeat markets quality, loyalty and image were more relevant (Gartner & Konecnik, 2007; Konecnik & Ruzzier, 2011).

Figure 5. Customer-Based Destination Brand Equity by Gartner



Source: W.C. Gartner, *Deconstructing brand equity*, 2009, p. 55-57.

In general, the first dimension, destination awareness, is accepted to be the key dimension of a destination brand (de Chernatony & McDonald, 2003). A place must be known before it can be viewed as potential travel destination. Goodall (1993) argued that there are four levels of awareness: dominant, top of mind, familiarity and knowledge. Dominant form does not always translate into increased tourist flows, especially in case of negative media coverage like with Iraq, Syria (Gartner, 2009).

Second dimension which is a destination image, as it was mentioned before, received a lot of attention in tourism literature. Gallarza, Saura and Garcia (2002) reviewed more than 140 papers devoted to brand image assessment. Basically, image describes attributes or essential features that one believes a destination possess. Images are used in branding campaigns to increase awareness and differentiate from the competitors (Gartner, 2009).

Loyalty, as a third dimension of destination brand equity, is related to repeated visitation to the destination. Gartner (2009) argues that it can be behavioural or attitudinal. Behavioural loyalty may occur due to family tradition, business needs and the financial commitment (such as timeshare). Whereas attitudinal is based on the destination attributes that are in cohesion with individual preferences of visitors.

The quality dimension can be described as meeting or exceeding visitor expectations. Maintaining good quality levels is important because, if promised destination image is not supported by relevant travel experience, the tourist satisfaction with the brand will be decreasing (Konecnik & Gartner, 2007).

Value dimension is viewed mainly in two ways: in terms of difference between costs and benefits of visiting destination (also known as customer value) and in terms of consumer willingness to pay price premium for the destination product (Christopher, 1996). Value is a subjective measure that differs it from the quality (Gartner, 2009). For example, customer

service in a ski resort maybe poor, but the value is still obtained because of easy access to destination. In its own way, brand value depends on perceived value. As long as customers believe that benefits received from the brand surpass the costs of its consumption, they would be willing to pay premium prices and will not switch even if the price is increased (Crimmins, 2000).

Alternative destination brand equity framework was developed and empirically tested by Pike (2007, 2010, 2014). Using previous brand equity concepts, he proposed customer-based brand equity definition that is conceptualised by four dimensions, namely, **brand salience**, **brand associations**, **brand resonance** and **brand loyalty** (Figure 6).

Figure 6. Customer-Based Destination Brand Equity by Pike



Source: S. Pike, *Customer-based brand equity for destinations: Practical DMO performance measures*, 2007, pp. 56–58.

Brand salience is the foundation of the four dimensions hierarchy. Unlike general brand awareness, brand salience represents the strength of the destination presence in the mind of the target market. It is normally measured by unaided awareness or aided brand recall. Brand associations include any meanings that traveller possess with respect to a given destination. Brand resonance is the willingness to travel to the destination. The top dimension of the hierarchy is brand loyalty that is defined as the attachment to the brand. It is attitudinal in terms of intention to revisit the place. Behavioural loyalty takes the form of word-of-mouth referrals and actual repeated visitation (Pike, 2007).

In addition to the destination brand equity dimensions developed by Pike (2007, 2010) and Gartner (2009), some researchers operate with additional dimension of the destination brand personality. Product or service brand personality was described by Aaker (1997) as personality **traits** usually **associated with humans** that consumers believe brand to possess. Generally, five dimensional structure of brand personality is accepted. It consists of **sincerity**, **excitement**, **competence**, **sophistication** and **ruggedness**. Each of the dimensions has own attributes. Sincerity dimension has attributes like down-to-earth, real, sincere and honest. Personality traits, such as daring, exciting, imaginative and contemporary, represent excitement dimension. Competence is characterized by the following attributes: intelligent, reliable, secure and confident. Sophistication is defined

with traits such as glamorous, upper-class, good looking and charming. The ruggedness dimension has features like tough, outdoorsy, masculine and western (Aaker, 1997).

The concept of destination personality in tourism literature is mostly considered as **affective attribute** of image dimension within brand equity construct (Henderson, 2000; Hosany, Ekinici, & Uysal, 2006; Konecnik & Gartner, 2007; Tasci & Denizci, 2009; Gartner, 2014). It is also described as a total of destination functional, symbolic and experiential characteristics (Hankinson, 2004).

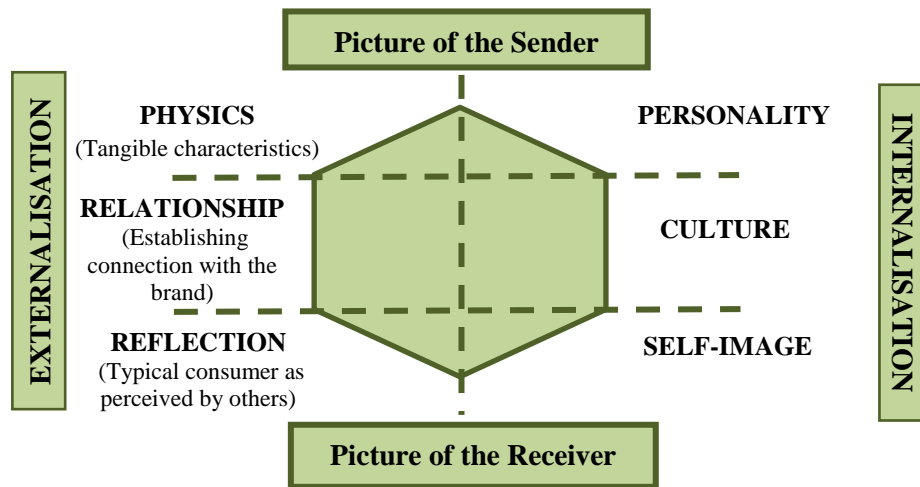
Unlike destination brand equity which represents tourist perspective of the brand, **destination brand identity** is a concept derived from the supply side (Kapferer, 1997; de Chernatony & McDonald, 2003). Aaker (1997) argued that brand identity is a combination of associations about the product that brand managers would like to build and sustain. It is also defined as a **desired brand identity** (hereinafter: DBI). According to Janiszewska (2013), desired brand identity which tourism stakeholders promote through different marketing tools is called **communicated brand identity** (hereinafter: CBI).

Kapferer (1997) proposes a framework of **brand identity prism** within which brand identity is expressed with six key elements. Physical appearance (1) forms the core of the brand identity and its added value. It also reveals the quality of the brand. Brand personality (2) communicates brand character to the customer. Apart from that, brand identity represents the culture (3) in which it was originated. Therefore, it normally illustrates cultural values of country of origin. These values shape the principles on which a particular brand bases its own behaviour. Furthermore, brand identity includes relationship aspect (4) that requires establishment of communications with customers. The latter emphasises the style of behaviour associated with the brand. On top of that, communications represent a tool to understand the voice of the customers, their demands and perceptions of a particular brand.

Because brand communication aims at reflecting customer profiles, the identity embodies the component of a customer reflection (5). It is important to note that customer reflection does not define potential customers of the brand. On the contrary, it reflects a customer in a way, which would help them to view themselves consuming a particular good or service. The last element of the concept is consumer self-image (6). It explains brand features with which consumers tend to identify themselves and features they would like to be reflected by (Kapferer, 2004).

Figure 7 below summarizes the model of brand identity prism and shows that personality, culture and self-image are part of internalisation of the brand within the company, while brand physics, relationship and reflection characterise its projection on customer base.

Figure 7. Brand Identity Prism



Source: J.N. Kapferer, *The new strategic brand management: creating and sustaining brand equity in long term*, 2008, p. 183.

Furthermore, Kapferer (2004) points out four crucial differences between brand identity and brand image, which are shown in the Table 2 below.

Table 2. Brand Identity and Brand Image Difference

Brand Identity	Brand Image
Source: company focused	Receiver: target audience focused
Created by managerial activities	Created by consumer perceptions
Encoded by 'brand originator'	Decoded by 'brand receiver'
Identity is sent	Image is received

Source: J.N. Kapferer, *The new strategic brand management: creating and sustaining brand equity in long term*, 2004, p. 34

As we can notice, first distinction is that identity is company focused and created by managerial activities, while image operates with target audience and exists in consumer mind. In addition to this, brand identity is encoded by managers. Hence, image is decoded by target audience. Ideally, brand identity meaning should be similar to the the image. This basically depends on the effectiveness of identity communication.

Undoubtedly, brand identity, which is generated and projected by tourism stakeholders, plays important role in the branding effectiveness evaluation (Cai, 2002; Konecnik & Go, 2008; Tasci & Gartner, 2009; Tasci, 2011).

Both destination brand identity and destination brand equity operate with notion of brand as an individual entity. However, recent destination marketing research shows that it is possible to market destination as an **umbrella brand**.

Traditional definition of an umbrella brand is that it represents a bundle of products or so called sub-brands unified by company's reputation as an insurance of consistent quality (Wernerfeldt, 1998). There are two main objectives of umbrella branding: to reduce perceived risk when introducing new products under the umbrella (1); to improve quality perceptions of new brand partners (Laforet & Saunders, 1994).

Similarly to product umbrella brands, it is possible to market destination as an umbrella brand that contains a bundle of local destinations, goods and services (sub-brands) united by the destination identity (Krajnovic, Bosna, & Jasic, 2013). In other words, as a marketing strategy, destination umbrella branding promotes different sub-brands of tourism stakeholders (hotels, cities, airlines, etc.) under single destination brand name. It is critical for the umbrella brand to capture the spirit of the destination, its identity and core values. The challenge is to make potential visitors integrate existing perceptions of the destination across sub-brands. Thus, it is important to establish connections between sub-brands by outlining common values that should be strengthened within identity of sub-brands (Iversen & Hem, 2008).

The uniqueness of destination umbrella branding is that it introduces some local features and qualities into identity of partner brands enabling prompt identification of those brands with the destination. To put it differently, it enhances brand recall and recognition (identification) and improves quality of brand associations (differentiation) (Iversen & Hem, 2008).

1.2 Definition of destination branding effectiveness

All of the concepts discussed previously represent elements that are ordinarily used to evaluate **destination branding effectiveness** (hereinafter: DBE). Since the main objective of the destination branding is to create a brand that (1) allows tourists to identify destination and (2) differentiates destination from competitors, DBE can be defined as the extent to which marketing reaches mentioned objectives (Tasci & Denizci, 2009; Poskart, 2014).

In order to evaluate DBE, researchers assess either tourist perception of destination brands (demand side) or the way how branding process is organised (supply side). According to Pike (2007), the most frequent approach taken by scholars is to measure destination customer-based brand equity (demand side). Questionnaires of tourist perceptions define how well destination brand performs within different brand dimensions.

To assess effectiveness of destination branding from the supply point of view, concepts of brand identity and umbrella branding can be applied. For example, if DBI differs from CBI, it implies that there is a difference between what managers want destination to be attractive for and what identity they actually promote. Thus, branding process is ineffective (Mak, 2010). The existence of umbrella branding shows how well organised is collaboration between stakeholders with respect to the destination brand. Evidently, in case when each stakeholder advertises own sub-brand with no connection to destination brand, it may contradict or even damage branding strategy of that destination (Pritchard, Morgan, & Roig, 2010). If tourism stakeholders and local destinations are promoted under the national umbrella brand, the final marketing message is more powerful and efficient in reaching target audience and creating holistic image of destination.

1.3 Existing research of destination branding effectiveness

At the moment, the dominant empirical approach to measure effectiveness of destination branding is the **assessment of destination brand equity**.

The overview study of the tourism papers devoted to destination brand effectiveness between 2001 and 2011 showed that overall 43 articles were published in this field. Most of them were conceptualizing brand effectiveness in the form of destination brand equity. Researchers were focusing on specific target groups (countries, type of tourism) and avoided cross-sectional studies. Majority of the sector-specific studies were analysing the demand side only (perceptions of tourists) (Giannopoulos, Kladou, Mavragani, & Chytiri, 2012).

According to Zenker and Martin (2011), success in destination branding can be evaluated through perspective of the brand centricity which implies assessment of customer-based brand equity. They mostly focused on brand knowledge analysis, particular on brand awareness (brand recall and recognition) and brand image (favorability, strength and uniqueness of brand associations).

Gartner (2014, p. 5) argues that “any increase in brand dimensions, resulting in increased visitation or spending is the marginal increase in brand equity resulting from a marketing campaign.” And this shows to what extent the marketing efforts are productive. Thus, brand equity can be a useful method of measuring returns on brand investment.

Despite the fact that brand equity measures are intangible, Gartner (2009) believes that quantitative surveys with Likert-type scales should be sufficient to measure improvements in brand equity. As an alternative, different qualitative methods like in-depth interviews and focus groups with actual and potential visitors can be applied to evaluate brand strength and attractiveness and, therefore, conclude on overall branding effectiveness.

In addition to the analysis of five traditional brand equity dimensions, researchers may use Brand Personality Scale (BPS) developed by Aaker (1997). Table 3 describes the traits that constitute each of the personality dimensions.

Table 3. Brand Personality Scale by Aaker

Dimension	Personality dimension	Relevant Traits
1	Sincerity	Down-to-earth; Honest; Genuine; Cheerful
2	Excitement	Daring; Spirited; Imaginative; Up-to-date
3	Competence	Reliable; Intelligent; Successful
4	Sophistication	Glamorous; Charming
5	Ruggedness	Outdoorsy; Tough

Source: J.L. Aaker, *Dimensions of brand personality*, 1997, pp. 351–352.

The limitation of the Brand Personality scale is that it might be unstable across different cultures. Hence, it can be inappropriate to measure brand personality values in a different cultural context (Aaker, 1997).

Another useful application of customer based brand equity (hereinafter: CBBE) is that destination managers can analyse it at different points in time to track strengthening and weakening of the brand (Pike, 2007). A study of 13 regional destinations in Queensland, Australia, conducted by Pike (2014), measured branding effectiveness between 2003-2012 with the help of CBBE. Research benchmarked perceptions of the Brisbane destination relative to its competitors in 2003, 2007 and 2012. Its findings show that destination brand equity changes slowly over a long period of time. Study suggests that due to frequent changes in destination brand campaigns, a few destinations managed to create long-lasting brand identities (Pike, 2014).

What makes brand equity measurement over time more challenging is that DMOs are subject to political influence. Due to governmental elections, change in staff and public funding, destination marketing campaigns undergo permanent revisions and adjustments. Such modification of destination branding message prevents DMOs to measure improvements in CBBE effectively (Pike, 2005).

Practice shows that the concept of brand equity remains the dominant tool of the researchers to define destination brand effectiveness. Table 4 presents an overview of important works in this area. The third column specifies CBBE dimensions used in the

studies. The last column explains the means of operationalization of the brand equity dimensions and research methodology applied in the studies.

Table 4. DBE Studies Based on Destination Brand Equity Concept

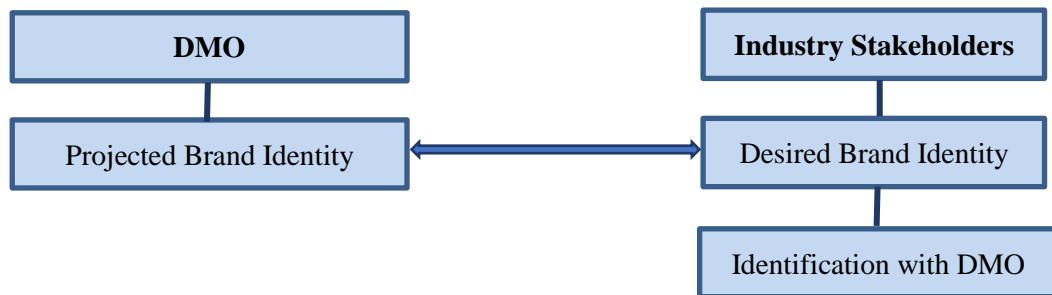
Author	Title	Variables measured	Methods
Boo, Busser, & Baloglu (2009)	A model of customer based brand equity and its application to multiple destinations	Destination Brand Image Destination Brand Awareness Destination Brand Quality Destination Brand Value Destination Brand Loyalty	Survey Structural equation model
Konecnik & Gartner (2007)	Customer-based brand equity for a destination	Destination Brand Image Destination Brand Awareness Destination Brand Quality Destination Brand Value Destination Brand Loyalty	Content analysis Free association Exploratory factor analysis Confirmatory factor analysis
Pike (2007)	Customer-based equity for a destination: practical DMO performance measures	Salience Association Resonance Loyalty	Free association Repertory grid Frequency Percentage
Pike (2009)	Destination brand positions of a competitive set of near-home destinations	Salience Association Resonance Loyalty	Free association Repertory grid Frequency Percentage

Another way to measure DBE is to **evaluate the branding process** itself. Unlike destination brand equity studies, which focus on the actual outcomes of branding activities, brand identity approach concentrates on the evaluation of the branding process. For instance, it reviews the marketing message sent by stakeholders and checks the difference between organic, communicated and received brand identities. Thus, this approach is more qualitative in its nature, although it may involve a set of quantitative methods.

Mak (2011) assessed branding of Iowa focusing on the examination of the destination brand identity. The research, firstly, identified the brand identity of the destination through the content analysis of the marketing material and interview with the manager of the local DMO. A set of brand identity attributes was derived in the end. Then destination brand salience was evaluated by the various industry stakeholders and identity attributes derived previously were rated according to their strength of describing the destination image. This way Mak checked the existence of the gap between destination identity being communicated by tourism office and organic brand identity possessed by the rest of tourism industry actors.

In addition, the level of identification with Iowa tourism office was checked to examine the quality of the partnership between industry stakeholders and state tourism office responsible for tourism promotion. Since the results showed no considerable gap between image and identity as well as close identification of stakeholders with DMO, the conclusion was made that branding efforts of the industry suppliers are efficient (Mak, 2011).

Figure 8. Brand Identity Gap between DMO and Stakeholders



Source: A.K.Y. Mak, *An identity-centered approach to place branding: case of industry partners' evaluation of Iowa's destination image*, 2011, pp. 438 - 443.

Different approach to DBE evaluation was taken by Pritchard et al. (2010). They argued that since a country may consist of several destinations, it might happen that branding strategies of local cities and regions will conflict and undermine countrywide branding strategy. Thus, it is necessary to assess if **umbrella branding process** is in place. Research focused on Catalonia and Wales and their umbrella brands, Spain and United Kingdom. The aim of the study was to explore relationship between regional brands and their country umbrella brands (Pritchard et al., 2010). Firstly, content analysis of promotional text and visuals presented on the official destination websites was done. It enabled researchers to discover the destination brand values supported by DMOs. Then, network analysis was employed to investigate connections between derived values. Their relationship was presented graphically with the help of Visone program. The results showed that UK based its branding on the diversity and contrast between different parts of the country. It made brand of Wales, which focused on differentiation from UK, fit perfectly within the country brand strategy. In the second case researchers revealed weak integration between brands of Spain and Catalonia.

The concept of umbrella branding was also used in the following two studies. Cetinski, Peric, & Jurdana (2006) suggested to view a particular destination as an umbrella brand that is aimed to unite different brand meanings of that destination. In case of Kvarner destination, those meanings included fashionable setting, preserved identity, natural diversity and rich cultural heritage. According to researchers, these four elements comprised the Kvarner destination umbrella brand.

In another research, umbrella branding concept was applied to the destinations of Istria and Dalmatia (Krajnovic et al., 2013). They suggested that region should be divided into clusters (sub-brands) in order to brand it more efficiently. These local units (sub-brands) within region comprise the umbrella brand. All sub-brands should build their brand identity around the identity of the region. It makes overall umbrella brand stronger than in the case of independent branding. The study highlights that collaborative marketing within umbrella construct makes branding efforts on the supply side more efficient. However, researchers do not specify methods of evaluating umbrella branding and its effectiveness.

The most comprehensive understanding of the organisation and contribution of the umbrella branding to stakeholders was given by Iversen and Hem (2008). They developed six criteria under which umbrella branding should be successful, namely, strength of associations, favorability of associations, their uniqueness, relevance, congruence and level of abstraction. However, the hypotheses connected to those six criteria were not empirically tested.

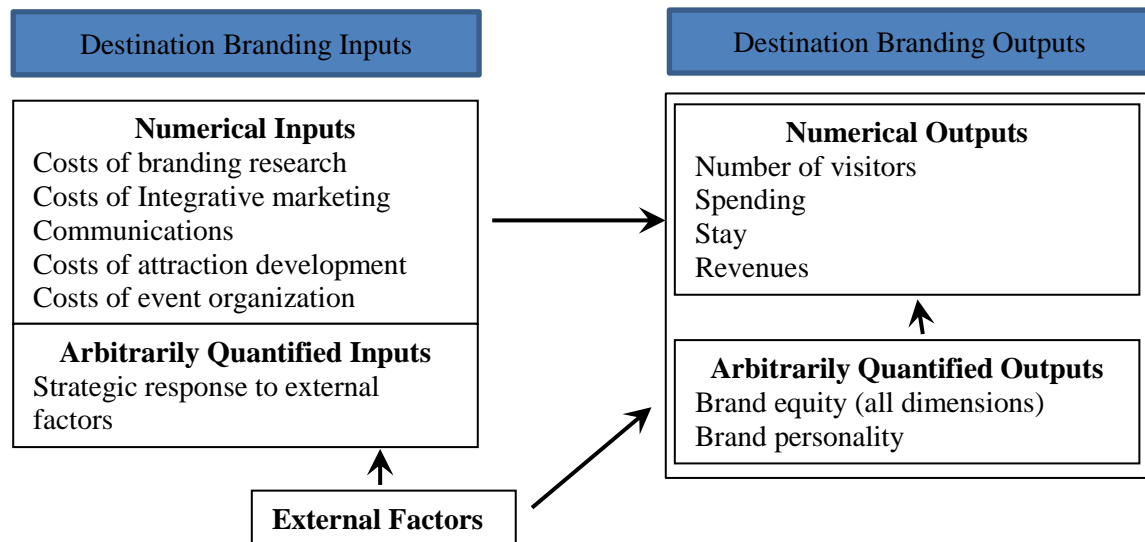
Finally, there are some alternative methods to evaluate DBE that are different from the previous. Several metrics were developed to measure return on brand investment (hereinafter: ROBI) for the product companies. David and Smith (1998) proposed static framework that defined strong and weak attributes of the brand based on the values of the following indicators: brand knowledge, position, contract fulfilment, personality, customer gain, customer retention and loyalty, penetration/frequency ratio and brand value.

Schultz (2002a) acknowledges that for the authorities it is important to know how brand management assists in gaining, retaining customers and selling more to the current customers. He developed more comprehensive ROBI metric that includes attitudinal measures, income flows of relevant marketing activities, brand equity and marketing-mix model. It is critical to recognize that metric's value is not the same for all companies and depends on type of the business. Schultz argues that brand equity is the best option when it comes to improvement of long-term and short-term value for stakeholders. In addition, he points out that the measurement of branding effectiveness has to pay attention to external factors like political climate, diseases in region, economic situation, because they might influence the branding results.

Furthermore, a comprehensive framework for the strategic brand management was delineated by Tasci and Gartner (2005). The idea is to identify brand attributes in the perception of residents, destination authorities, actual and potential tourist markets by using quantitative surveys, in-depth interviews. In combination with content analysis of promotional material, the results are likely to help in revealing projected and received brand meanings. Hence, depending on the congruence of the meanings, brand effectiveness is determined.

According to Tasci and Denizci (2009), general financial performance measures like return on investments and sales are not effective due to their short-term focus, while destination branding has long-term effects. Instead, they proposed a model that included both financial and long-term brand measures of brand equity and brand personality.

Figure 9. Model of Destination Brand Input-Output Analysis



Source: A.D.A. Tasci & B. Denizci, *Destination branding input-output analysis: a method of evaluating productivity*, 2009, p. 4.

Measuring brand equity and personality cannot be expressed in financial terms, that is why Tasci and Denizci (2009) included visitor numbers and revenues in their framework. Both variables depend on the strength of brand equity and brand personality. They argued that it is possible to measure behavioural proxies, such as number of visitors responding to a certain type of branding activity. Not only external factors were included in the measurement framework by Tasci and Denizci, they also stated that it is necessary to count costs of strategic response to those external factors. Apart from that, longitudinal tracking of both soft and hard data is considered by them to be important for branding input-output analysis.

Davis and Smith (1998) supported the idea that certain measures used for consumer product companies can be applied for destinations. For example, customer gains, as a result of brand management, represent a percentage change in number of visitors in comparison to previous year. Another metric is customer retention (loyalty) which can be operationalised via the number of repeated visitors. The latter are easily identified through tourist surveys.

According to Blain, Levy and Ritchie (2005), effectiveness of destination branding can also be determined through consumer research that should include the measurement of

visitor perceptions of the destination logo and image before and after visitation. It helps to define whether the transmitted image that formed visitor expectations is matched with actual experience.

1.4 Critical summary of literature review

Based on literature review of the destination branding and brand effectiveness measurement it is possible to highlight a set of aspects that form a significant research gap in this field.

First of all, conceptually there is no universally accepted approach to define DBE. In general, most of the tourism scholars tend to assess it through brand equity concept. This represents only perspective of tourists. That is why there is a need to establish a framework where effectiveness would be assessed from destination supply point of view. It is highly important for the destination to have an agreement between different stakeholders (accommodation, transportation, DMOs, etc.) with respect to the marketing of destination. If DMO tries to project one identity of the destination and airlines promote another identity, it decreases DBE. Konecnik and Ruzzier (2009) pointed out the importance of supply side assessment. Nonetheless, their conceptual framework was not tested empirically.

Secondly, a few studies were devoted to the assessment of destination brand effectiveness in regard to relevant competition. A recent brand equity study of Chile, Argentina and Brazil from the perspective of Australian market (Bianchi et al., 2014) aimed to explore Australian consumer attitudes toward South American destinations. However, little attention was paid to comparison of branding efforts of competing countries.

Lastly, destination brand research has not addressed the cases when changes in destination brand equity were generated under the influence of the external events (for example, political turmoil in competing destination). It is important to differentiate the reasons of the fluctuation in the destination brand value, since it might not be directly connected to the branding strategy itself. The reaction of DMO to such events should be examined as well. The more proactive are mitigation activities, the more likely destination would maintain its brand value.

2 OVERVIEW OF TOURISM INDUSTRY OF KAZAKHSTAN

Department of Tourism Industry (hereinafter: Department) is the agency that is responsible for managing tourism development of Kazakhstan. It carries out all functions of destination management organisation (Competence of Tourism Department, 2017):

- promotion of national tourist product;

- strategic development of the industry;
- governing regional tourism development and investment projects;
- tourism legislation, implementation, monitoring.

According to the law of Republic of Kazakhstan “About touristic activity” (2001) cities and administrative regions have own tourism departments that are responsible for development and promotion of local tourist products. There is also Tourism Counsel which consists of representatives of state and non-profit associations. It carries out consultory and advisory role in regard to questions like attracting investments, building destination image, training tourism specialists.

As for the impact of tourism industry on the country's economy, direct contribution of tourism to the GDP in 2016 was 2.4 billion dollars, 1.9% of total GDP. Taking into account indirect effect (governmental spending, private investments, spending by suppliers) and induced effect (spending of direct and indirect employees), total contribution to GDP was 7.9 billion dollars, 6.2% of GDP in 2016. Kazakhstan takes 71st and 68th world ranking according to the direct and total GDP contribution of the tourism industry (WTTC, 2017a).

Foreign tourists spent 1.7 billion dollars (3.9% of total tourist expenditure) in 2016. Apart from that, tourism industry provided 181,500 jobs which constitutes 2.1% of total national employment (WTTC, 2017a).

Kazakhstan provides a variety of tourist products (Visit Kazakhstan, 2017):

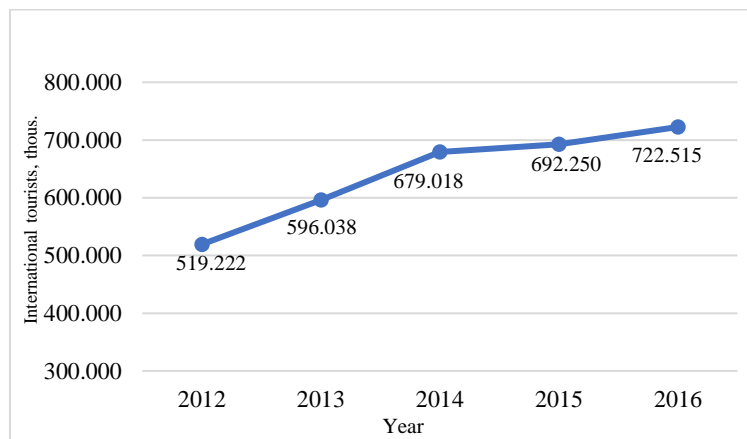
- nature-based tourism (Aksu-Zhabagly and Korgalzhyn nature reserves; Altyn Emel, Katon-Karagay and Bayanaul national parks);
- trekking (Tien Shan, Altay, Ulytau mountains);
- winter sports (Medeo ice-skating rink, Shymbulak ski resort);
- water sports and sunbathing (lake Balkhash, Caspian sea);
- medical tourism and ethnotourism.

All major cities have their own airports, but only Astana, Almaty and a few other regional centres receive international flights (Visit Kazakhstan, 2017).

2.1 Dynamics of inbound tourism development

According to the data of National Statistics Committee (2017) number of tourists registered in accommodation establishments is gradually increasing for the last five years. If in 2012 this number was almost 520 000 visitors, last year showed of 39% of growth in international arrivals to lodging facilities (Figure 10). Majority of visitors (84%) arrived in Kazakhstan with business and professional purposes.

Figure 10. Volume of Foreign Tourists at Accommodation Establishments



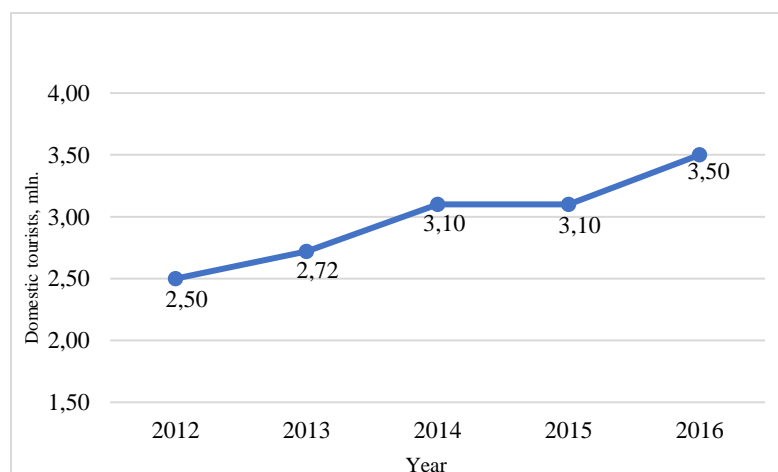
Source: National Statistics Committee, 2017.

Most of the international tourist receipts are generated from the visitors of Commonwealth of Independent States (hereinafter: CIS), reaching 1.2 billion dollars in 2015, while foreign tourists from the rest of the world spent 448.4 million dollars. Astana and Almaty receive the largest number of international arrivals – 71% (National Statistics Committee, 2017).

2.2 Dynamics of domestic tourism development

Figure 11 displays steady growth of domestic trips within the period of 2012-2016. In comparison with the base year, 2016 registered 28.5% positive increase in domestic visitation (National Statistics Committee, 2017).

Figure 11. Volume of Domestic Tourists at Accommodation Establishments



Source: National Statistics Committee, 2017.

Majority of domestic tourists arrive to Astana and Almaty – 28.8% of total domestic trips. East Kazakhstan is third popular destination among domestic travelers, accounting for 12.5% of visitation. Burabay natural resort and Mangistau region host 8.2% and 4.7% of visitors (National Statistics Committee, 2017).

2.3 Positioning among main competitors

The main tourism competitors of Kazakhstan in the region are Kyrgyzstan and Uzbekistan (Statute about tourism development in Kazakhstan till 2020, 2014). All three states share common history (nomadic and soviet heritage), possess similar natural resources (mountains, lakes), national cuisine and hospitality of local people. As a result, tour operating companies of the region undergo intense competition for attracting foreign tourists (Shestakova, 2015).

However, regardless of competition national tourism departments put efforts to establish cooperation. For example, countries participate in international Silk Road Program which aims to develop competitive tourism product within the countries of ancient Silk Road. Except Kazakhstan, Kyrgyzstan and Uzbekistan, there are other 25 countries that joined the program (Kantarci, Uysal & Magnini, 2014).

The following Table shows main tourism indicators of Kazakhstan and its competitors, Kyrgyzstan and Uzbekistan. Kazakhstan is the largest recipient of international arrivals in Central Asia. Evidently, the country obtains larger share of international tourist receipts. All three states are predominantly visited by tourists from CIS region (UNWTO, 2016a).

Table 5. Main Tourism Indicators of Central Asian States, 2014-2016

Country	Int. tourist arrivals (million)	Arrivals by country of residence (%)	Int. tourist receipts (billion, \$) in 2016
Kazakhstan	4,6 (2014)	CIS: 81.6 China: 3,6 Germany: 1,26 Turkey: 1,66	1,7
Kyrgyzstan	2,8 (2014)	CIS: 93 China: 1,05 Turkey: 1,16	0,426
Uzbekistan	2,1 (2013)	CIS: 90.1 Republic of Korea: 1,31 Turkey: 1,77	0,208

Source: World Tourism Organisation, *Compendium of tourism statistics dataset*, 2016a; World Tourism Organisation, *UNWTO tourism highlights*, 2016b.

According to the Travel and Tourism Competitiveness Index (WEF, 2017), Kazakhstan takes 81st place in the world ranking, while Kyrgyzstan is 115th. Looking at index

components, Kazakhstan received the highest scores for health/hygiene and price competitiveness of the destination (6th and 8th place). As for the tourist service infrastructure, country is 97th out of 136 countries, whereas Kyrgyzstan is 128th. No information is available for Uzbekistan.

Commonalities can be found in the destination brand logotypes and slogans. Between 2006 and 2009 Kazakhstan ran marketing campaign that used the following slogan: “At the crossroads of the world, in the center of Eurasia”. Logotype of the country depicted “Shanyrak” which is the roof of portable nomadic house. It is one of the most sacred symbols in nomadic culture and signifies peace and prosperity of home (Kazakhstan tourism, 2017). Up to 2017 the Department has used two other slogans: “Kazakhstan – heart of Eurasia” and “Kazakhstan – land of wonders” (Visit Kazakhstan, 2017). In June, 2016 Department launched official destination mobile app with a new slogan: “Kazakhstan – land of the Great Steppe” (Dyussebekova, 2016). It is evident that all mentioned slogans appeal to unique geographical location of Kazakhstan and its natural landscape.

Recently developed slogan of Kyrgyzstan, “So much to discover”, is more general than the previous one that linked country's identity to its nomadic history and important medieval trade routes. The logo displays the mountains and Issyk-Kul lake appealing to the natural beauty of the destination, while ancient ornaments point out nomadic heritage (Discover Kyrgyzstan, 2017).

The brand logo of Uzbekistan, unlike its competitors, lacks a slogan of the country. In 2016 Tourism Ministry of Uzbekistan announced new destination slogan – “Naturally irresistible”. It aims to convey destination's history, hospitality of people, culture and cuisine (Uzbekistan, 2017; Welcome to Uzbekistan, 2017). Table 6 below summarizes brand logotypes and slogans of Central Asian states.

Table 6. Tourism Logos and Slogans of Central Asian States




Logo	Slogan
	<ol style="list-style-type: none"> 1) At the crossroads of the worlds In the center of Eurasia 2) Kazakhstan - heart of Eurasia 3) The land of wonders 4) The land of the Great Steppe

table continues

continued

Logo	Slogan
	<ol style="list-style-type: none"> 1) Oasis on the Great Silk Road 2) So much to discover!
	<ol style="list-style-type: none"> 1) The heart of Central Asia 2) The land of colours 3) Naturally irresistible!

Sources: *Kazakhstan tourism*, 2017; *Discover Kyrgyzstan*, 2017; *Welcome to Uzbekistan*, 2017.

There is no doubt that development of authentic and competitive national tourism brand constitutes an important challenge for Central Asian republics due to homogeneity of their tourist product. Even the names of the countries share similar ending – “stan”. That is why President of Kazakhstan initiated discussions in 2014 about potential change of the name of the state to “Qazaq Eli”. The justification of such a change lied in the desire to distance and differentiate Kazakhstan from other Central Asian republics. However due to concerns of maintaining multiethnic peace and stability, the development of the project was stopped (Shustov, 2014).

3 RESEARCH METHODOLOGY

3.1 Research design

Research question and sub-questions of this study focus on the branding process evaluation from the supply side perspective.

In order to define whether destination branding is effective, a combination of research methods were used to answer each of the sub-questions.

To determine features of CBI, firstly, **content analysis** of available destination promotional material and national branding strategy was done. Secondly, **semi-structured email interview** with national DMO representative was conducted (Appendix B). Interview included the following questions:

- **Please, describe destination identity of Kazakhstan that national tourism office promotes in marketing campaign.**
- **What marketing tools are used by national tourism office in branding the destination?**
- **Please, specify whether local DMOs (Almaty, Astana, Burabay or Aktau) promote destination under national umbrella brand.**

Answering a second sub-question, **questionnaire** (Appendix C) was distributed among the following stakeholders:

- 10 hotels;
- 10 tour operators and agencies promoting inbound tourism;
- National airline Air Astana;
- Regional tourism offices (Astana, Almaty, Burabay, Aktau).

The survey assessed the extent to which industry stakeholders support the identity that is promoted by DMO. Communicated brand identity derived from the interview with national tourism office was presented in the form of battery of identity traits. Their favorability for destination branding was evaluated by industry stakeholders on Likert-type scale from 1 to 5 (Saunders, Lewis, & Thornhill, 2009). To determine stakeholders' DBI and their level of cooperation with the Department, questionnaire contained two open-ended questions:

- **What brand identity of Kazakhstan, do you think, should be promoted to foreign tourists?**
- **How do you cooperate with the Department concerning destination branding? Please specify if you implement your marketing campaign under the national umbrella brand?**

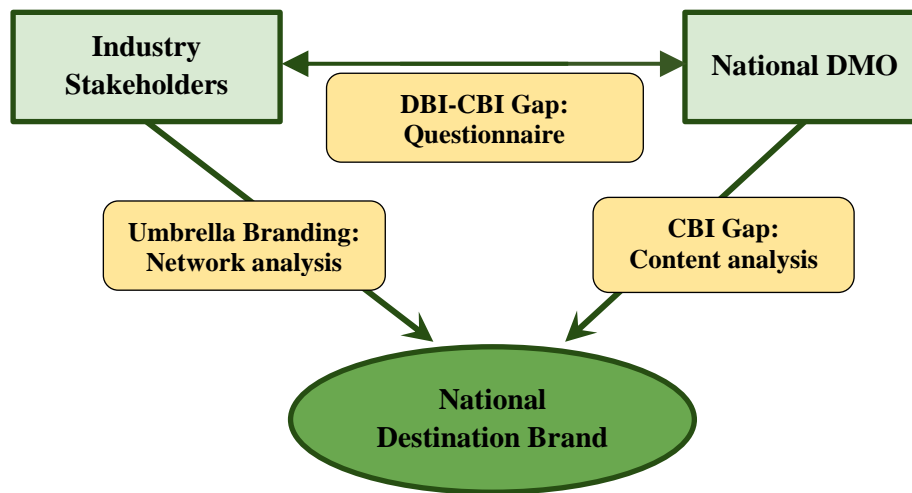
Lastly, **network analysis** of promotional information generated by dominant tourism businesses and local destinations (Astana, Almaty, Burabay, Aktau) was done by using Visone software. It enabled the author to find out whether sub-brands are well connected to the marketing of national brand.

Additionally, official websites of regional DMOs and industry stakeholders were assessed in terms of using logo, slogan and promotional videos of national tourism brand. The analysis showed the state of umbrella branding efforts among the industry stakeholders. It also allowed us to determine destination traits that constitute the core of national umbrella brand.

3.2 Research framework structure

Research framework consists of two pillars. First pillar represents national DMO that forms and implements country branding strategy. Evaluation of CBI gap checks the effectiveness of brand identity communication. Second pillar represents tourism industry stakeholders that also influence communication of the destination brand identity. Examination of umbrella branding is needed to define whether stakeholders' sub-brands strengthen or diminish the national destination brand. Finally, industry stakeholders are inspected for the congruence with national DMO with respect to promoted destination identity.

Figure 12. Destination Branding Effectiveness (DBE): Supply-Side Approach



To a great extent, overall branding effectiveness depends on the quality of collaboration between national DMO and industry stakeholders.

3.3 Content analysis of promotional material

Content analysis is a research technique that allows scholars to analyze large text data and reduce it to fewer thematic categories using specially developed scheme of coding. There are several approaches to content analysis. A conventional content analysis is applied to describe a phenomenon and demands derivation of coding categories from the text data. A summative approach focuses on identifying and quantifying keywords within the content and provides explanation of the context in which they are used (Shannon, Hsieh, 2005). Both conventional and summative methods are used in this study.

First step of the content analysis involved collection of primary data in the form of semi-structured email interview with the representative of the Department. Furthermore, conventional content analysis was applied to examine tourism development strategy

approved by the Department. The strategy is defined in the Statute about tourism development in Kazakhstan till 2020 (2014).

Analysis of national tourism strategy and interview with the Department representative revealed 12 desired destination brand identity attributes of Kazakhstan. For each attribute, its emotional and functional appeal was defined. Orvig (2014) applies the term “dominant mood” to determine where the attribute’s most important appeal lies on the functional/emotional scale. Functional appeal includes tangible characteristics of the experience, while emotional relates to the abstract cultural and human values.

Second step required detailed assessment of how intended brand identity attributes were communicated. Initially, all communication channels used by Department were identified. Overall, Department puts in practice five basic tools in order to form and promote tourism identity of Kazakhstan:

- Managing official tourist website: www.visitkazakhstan.kz and mobile app;
- Broadcasting promotional videos about the country on CNN, Euronews, Discovery, BBC;
- Organising information tours for journalists of the largest tourism media (National Geographic, Lonely Planet) to have published articles in their magazines;
- Hosting international tourist exhibitions (Expo, KITF - Kazakhstan International Tourism Fair), and international sport events (VII Winter Asian Games, World Ski Jumping 2016, Universiade 2017);
- Distribution of country tourist products through diplomatic representatives abroad.

Two samples of materials included relevant articles about tourism in Kazakhstan and promotional videos published in the last three years from the moment of approval of new tourism strategy. First sample related to marketing content generated by national DMO, second - by industry stakeholders. Summative approach was used to define and quantify keywords with the help of qualitative research software Nvivo. Depending on its promotional message, each keyword was allocated to one of the twelve brand attributes using developed coding scheme (Appendix D). Relevant counts showed how many times different keywords connected to corresponding brand attributes were mentioned in the content. Weighted percentage was used to illustrate share of the relevant counts of a particular attribute to the total amount of counts. The most and the least promoted brand attributes were identified. Apart from that, general message appeal was defined within each channel.

Initially, the results of first sample content analysis were assessed based on three perspectives:

- Ratio of relevant/irrelevant counts across marketing channels. The rule is to have messages consisting of counts that are relevant to promoted identity traits.
- Volume of repetition of messages (identity traits). According to the executive director of the Financial Brand, Pilcher (2014) repetition and frequency stimulate awareness and trust. Thus, it is more efficient to have fewer messages (3-4 identity traits) that are communicated more frequently.
- Distribution of emotional/functional appeal across the channels. As stated by Thomas (2014), depending on the stage of brand development, entities should apply different ratio of emotional/functional appeal in their marketing messages (Table 7).

Table 7. Emotional/Rational Appeal in Marketing Messages

Branding step	Emotion (% of counts)	Function (% of counts)	Channel
Awareness	High (60%)	Low (40%)	Promotional videos
Interest	Medium (50%)	Medium (50%)	Travel articles
Evaluation and trial	Low (40%)	High (60%)	DMO website

Source: B. Thomas, *How to use emotion and logic in your marketing messages*, 2016.

Then the results of second sample content analysis were compared with the DMO's. The differences in most and least promoted brand identity attributes between two samples were determined. Lastly, homogeneity of the branding message between DMO and businesses was evaluated.

3.4 Semi-structured email interview

In order to determine destination brand identity promoted by national DMO, a semi-structured email interview was organized with the representative of the Department. According to Lokman (2006), this method is a feasible alternative to traditional face-to-face and telephone interviews when a researcher faces time, financial constraints and when the respondent is hard to reach.

In terms of reliability of data, semi-structured email interview allowed author to avoid interviewer bias. Interviewer bias is created when the comments, tone and non-verbal behaviour of the interviewer influences the way how respondent answers the questions (Saunders et al., 2009). The table below summarises some of the benefits and drawbacks of the method.

Table 8. Advantages and Disadvantages of Email Interviewing

	Advantages	Disadvantages
Time	<ul style="list-style-type: none"> • Eliminates time required for transcribing; • No need to schedule appointments. 	May take several days before the interview is completed.
Costs	<ul style="list-style-type: none"> • There are no expenses of calling and traveling; • There are no expenses of transcribing. 	Can be high for participants
Environment Effects	<ul style="list-style-type: none"> • Participants express their opinions more honestly (due to the sense of anonymity); • Avoiding interruption that takes place in face-to-face/telephone interviews; • Eliminates transcription errors; • Disables status effect resulting from social/ethnic differences (race, gender, age, dress, gestures, disabilities). 	<ul style="list-style-type: none"> • Possibility for misinterpretation of the questions; • Loss of the visual and nonverbal cues due to inability to read facial expressions, body language or hear the voice tone; • Participants may lose focus.
Data Quality	<ul style="list-style-type: none"> • Data is more focused on the questions asked; • Responses are more thought out before they are sent. 	One-dimensional (based on text only).

Source: I. Lokman, *E-mail interviewing in qualitative research: a methodological discussion*, 2006, p. 1292.

Conducted interview (Appendix B) enabled the author to determine the traits of communicated brand identity that were later amended according to the national tourism strategy. The answer for the second question specified marketing tools used by the Department to promote destination. Material for the content analysis of national DMO marketing message was collected from the sources outlined by the respondent. Last but not least, interview clarified whether local DMOs were advertising regional sub-brands in compliance with the national umbrella brand.

3.5 Questionnaire

For the purpose of evaluation of the traits communicated by the Department, internet-mediated questionnaire was administered among representatives of marketing departments of critical tourism industry stakeholders. The survey was designed as anonymous and its sample size was relatively small including 35 stakeholders. The main criteria for the choice

of the stakeholders were involvement in development of inbound tourism and available promotional website with the content in English language. By the end of data collection stage, 25 valid responses were obtained.

Questionnaire, as explained by Saunders et al. (2009), is a data collection technique enabling researchers to identify and describe the variability in observed phenomena or examine the relationship between the variables.

For this study questionnaire was created (Appendix C) using One Click Survey (ICS), which is an open source program for creating and conducting online surveys. First part of the questionnaire included two open-ended questions. One requested respondents to define destination identity traits that they wished to be promoted. The other clarified forms of collaboration between the Department and industry stakeholders and whether the latter ran their marketing campaign supporting national umbrella brand. Since we needed the detailed answers, open questions were used for this part to obtain the responses. Second part of the questionnaire included battery of destination identity traits chosen for promotion by national DMO. Each trait represented a separate variable. Respondents marked their agreement level with the identity traits on a bipolar 5-point Likert type scale (1 = strongly disagree; 5 = strongly agree). Questionnaire ended with the demographic section that asked participants to define their gender and year of birth.

Collected data was processed in two ways. Answers from open-ended questions were examined. Then most occurred traits were derived and categorised according to their frequency. Answers from Likert-scale and demographic section questions were analysed with the help of Statistical Package for Social Sciences (SPSS). It is a software that provides researcher with tools of data preparation and analysis (IBM SPSS, 2017).

Statistical methods applied in the research included univariate analysis like Arithmetic Mean, Standard Deviation, percentage analysis and frequencies. Apart from it, bivariate analysis in the form of Independent T-test and Analysis of Variance (ANOVA) was used too to check if there were any differences in evaluation of destination brand identity attributes depending on age, gender and type of activity of respondents.

3.6 Network analysis: sub-brands and national brand

Network analysis is a research method that seeks to define and establish the relations between actors/entities and illustrate them visually in a structured form (Scott, Baggio, & Cooper, 2008). Network in this study will be referred as a connection between brand traits promoted by national, local DMOs and stakeholders.

Visone analytical program was used to develop relationship models between obtained brand identity traits. It is a software which analyses and visualises text in the form of a

network (Visone, 2017). This makes it particularly useful for displaying values associated with the brands.

First phase of network analysis required dataset preparation. Promotional information from local destination websites was collected (Astana, Almaty, Aktau and Burabay). Then 15 most repeated traits were identified for each region with the help of Nvivo software. In cases when the meanings of the traits were similar (synonyms, the same stems), their counts were summed up. The same procedure was applied to the web content of businesses involved in the support of inbound tourism (10 hotels, 10 tour operators, Air Astana airline).

Secondly, CSV files were created for each sub-brand using MS Excel program. CSV file is a comma-separated file that stores tabular data and is commonly used when working with Visone software (Visone Data Input, 2017). In this case study, columns represented attributes of country brand and rows contained traits of sub-brands. The data fields were filled with information on link strength between the attributes. The latter was defined on the scale from 1 to 10 depending on the number of times a particular trait was mentioned in the promotional content of the sub-brand. So in the end, each trait of the sub-brands was linked to the national brand attributes based on the coding scheme for content analysis.

Lastly, datasets were imported into Visone. The analysis started with computing node centralities. Node centralities measure the degree of the importance of each node (trait) depending on the number of the links connected to the node and the weight of those links (Visone Visualisation and Analysis, 2017). After that nodes were laid out using stress minimisation technique with dyad attributes. The purpose of the layout procedure is to recalculate positions of nodes and links with the aim of improving the readability of the network (Visone Visualisation Tab, 2017).

Using the Analysis tab, every network was modified in such a way that the size of the node varied depending on its importance within the network (Visone Visualisation and Analysis, 2017). At the same time the width of the links illustrated how dominant is a particular trait within the corresponding promotional information. Attributes of the national brand that incorporated the traits of the sub-brands were displayed in the shape of rhombus. To state it differently, rhombuses display attributes that comprise national umbrella brand.

Additionally, the official websites of stakeholders and local DMOs (Appendix E) were visually examined for usage of national destination logotype, slogan, promotional video. Pritchard et al. (2010) considered visual connections to the national brand as one of the indicators of umbrella branding. The importance of visuals in establishing and communicating brand identity by stakeholders was also highlighted by Blain et al. (2005), since they significantly enhance destination brand awareness as in case with “100% Pure New Zealand.”

4 RESULTS AND DISCUSSION

4.1 Evaluation of the gap within communicated brand identity

Conventional content analysis of the interview with the representative of national tourism department revealed 12 destination brand identity attributes aimed to represent the country. Attributes were cross-checked and edited in accordance with national tourism strategy approved by the Department. The table below provides a summary of major national brand identity attributes that DMO projects on target tourist markets.

Table 9. Destination Brand Identity Attributes of Kazakhstan

Kazakhstan Brand Identity	Brand Identity Attributes	Attribute Type	
		Functional	Emotional
Centre of nomadic culture & cultural diversity: “Being the largest landlocked country in the world, Kazakhstan is a unique, authentic destination. The cultural heritage is colourful and diverse due to 56 ethnic groups living in the country that have different customs, traditions and religions. During the nomadic period Kazakhstan was a part of a trade route between east and west via Great Silk Road.”	Nomadic		✓
	Cultural diversity (CD)		✓
	Great Silk Road (GSR)		✓
	Unique		✓
Modern & energetic urban environment: “Kazakhstan offers good service quality experience supported by modern innovative infrastructure & accommodation. It is accompanied with various entertainment facilities. Comfortable transportation and visa friendly policy make the country easily accessible and enables development of tourism.”	Accessibility	✓	
	Service quality (SQ)	✓	
	Entertainment (Ent)	✓	
	Modern	✓	
Rich diversity of landscapes: “Kazakhstan has a vast range of pure & wonderful landscapes from deserts bordering the lake that is half salt & half fresh to high mountains with modern ski	Rich nature	✓	
	Adventurous		✓

continued

Kazakhstan Brand Identity	Brand Identity Attributes	Attribute Type	
		Functional	Emotional
resorts. It is the base of our adventurous tourism.”	Purity	✓	
Caspian Riviera: “Kazakhstan offers a unique opportunity to experience sea, sun and sand tourism on the eastern shore of the world’s largest inland sea - Caspian.”	Pristine beaches (PB)	✓	

Based on the derived 12 brand identity attributes, we performed coding procedure in quantitative content analysis of the marketing material generated by national tourism department. The results uncovered several differences with respect to promotional focus across different communication channels.

The following table shows the frequency with which brand identity attributes were mentioned in the marketing content during last three years.

Table 10. Promotion of Kazakhstan Brand Attributes Across Major Communication Channels

Brand Identity Attributes	Channel Type					
	Website		Promo videos		Travel articles	
	Counts	Weighted percentage	Counts	Weighted percentage	Counts	Weighted percentage
Nomadic	104	24	51	14.2	209	10.3
Cultural diversity	12	3	27	7.5	254	12.5
Great Silk Road (GSR)	1	0.2	2	0.5	33	1.6
Unique	94	22	61	17	246	12.2
Accessibility	47	11	19	5.3	134	7
Service quality (SQ)	8	2	8	2.2	23	1.1

table continues

continued

Brand Identity Attributes	Channel Type					
	Website		Promo videos		Travel articles	
	Counts	Weighted percentage	Counts	Weighted percentage	Counts	Weighted percentage
Entertainment (Ent)	18	4.1	11	3	68	3.4
Modern	37	8.5	118	33	207	10.3
Rich nature	71	16.3	49	14	708	35
Adventurous	22	5	8	2.2	45	2.2
Purity	15	3.4	2	0.5	20	1
Pristine beaches (PB)	6	1.4	2	0.5	69	3.4
Relevant counts	435	30.2	358	90	2016	39
Total counts	1440	100	397	100	5173	100

Using information on the frequency with which attributes appeared in the marketing message, the effectiveness of the DMO's marketing message was evaluated. For the assessment, the author applied three criteria previously outlined in methodology: ratio of relevant/irrelevant counts, repetition volume and usage of emotional/rational appeal.

Criteria 1. Ratio of relevant/irrelevant counts

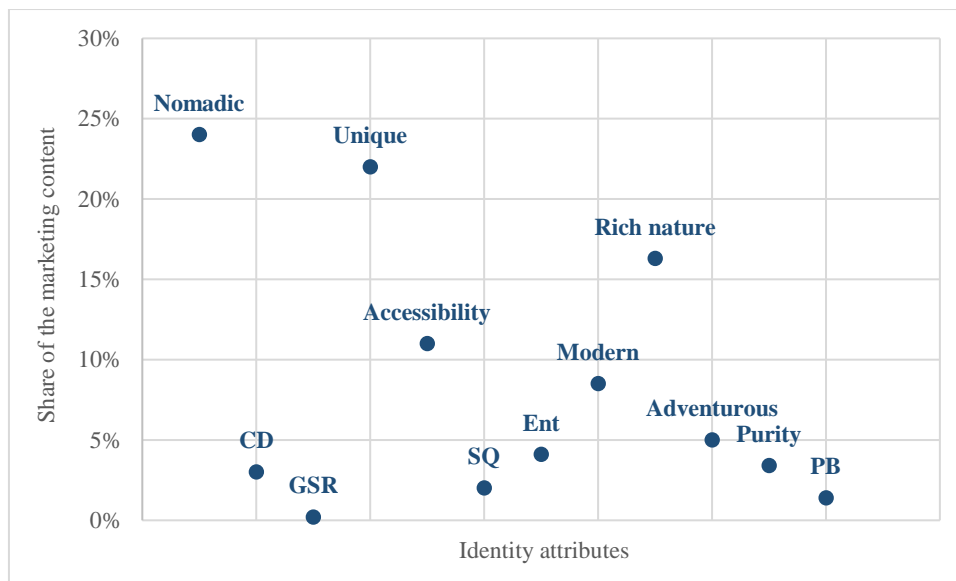
The lowest relevance of counts used in the marketing message characterises destination website (30.2%). This means that only each third count indicates one of the brand identity attributes. It is highly inefficient usage of marketing space, since nearly 70% of the content is simply not connected to the core message. Visual inspection of the destination website supports this conclusion. For example, Visit Kazakhstan provides information on tour packages to other countries like Turkey and Maldives, which obviously does not promote the destination.

Travel articles have 39% of counts that are associated with the identity traits. To put it differently, each relevant count is obscured by 1.5 irrelevant. Only promotional videos hold high efficiency rate with respect to communicating identity attributes containing 90% of relevant counts.

Criteria 2. Volume of repetition of messages

Figure 13 illustrates that destination website exclusively promotes the country as the centre of nomadic culture and unique travelling experience (46% of the relevant message). It is followed by the traits denoting Kazakhstan’s lavish nature, its accessibility to the tourists and modern facilities (35.8% of the counts). Least advertised attributes are “Great Silk Road”, “Service Quality” and “Pristine beaches” that altogether are accountable for only 3.6% of relevant counts.

Figure 13. Presence of Attributes on the Website of DMO



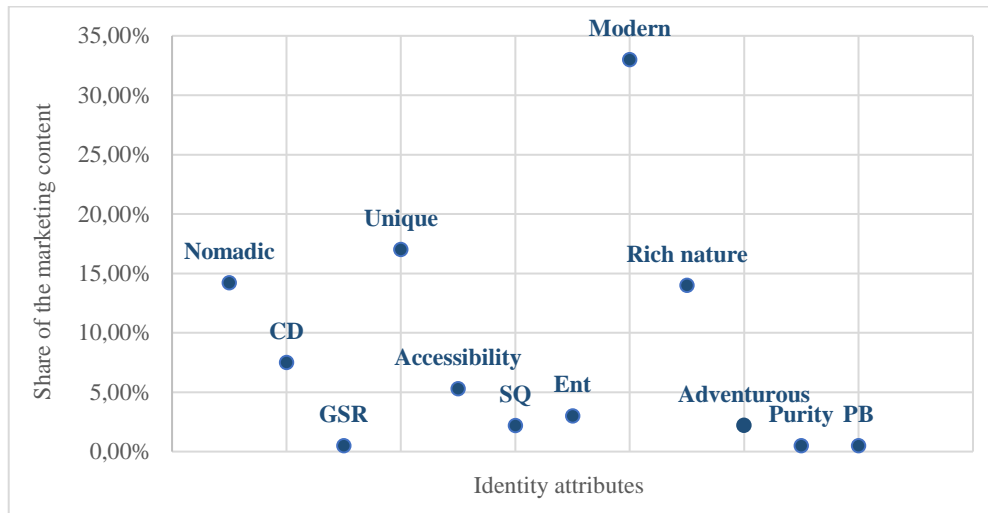
B) Promotional videos

Unlike destination website, DMO’s promotional videos heavily focus on depicting country’s innovative development, modern infrastructure and business-friendly environment (33% of the core message). Figure 14 clearly shows the dominance of attribute “Modern” in this communication channel.

Considerable amount of attention is also given to the attributes “Unique”, “Nomadic” and “Rich nature”. In total they occupy 45.2% of relevant counts. Least presented attributes are “Great Silk Road”, “Purity” and “Pristine beaches”. Combined they hold solely 1.5% of relevant counts.

In comparison to the destination website, promotional videos make significantly less emphasis on destination assessibility and its adventurous appeal.

Figure 14. Presence of Attributes in Promotional Videos

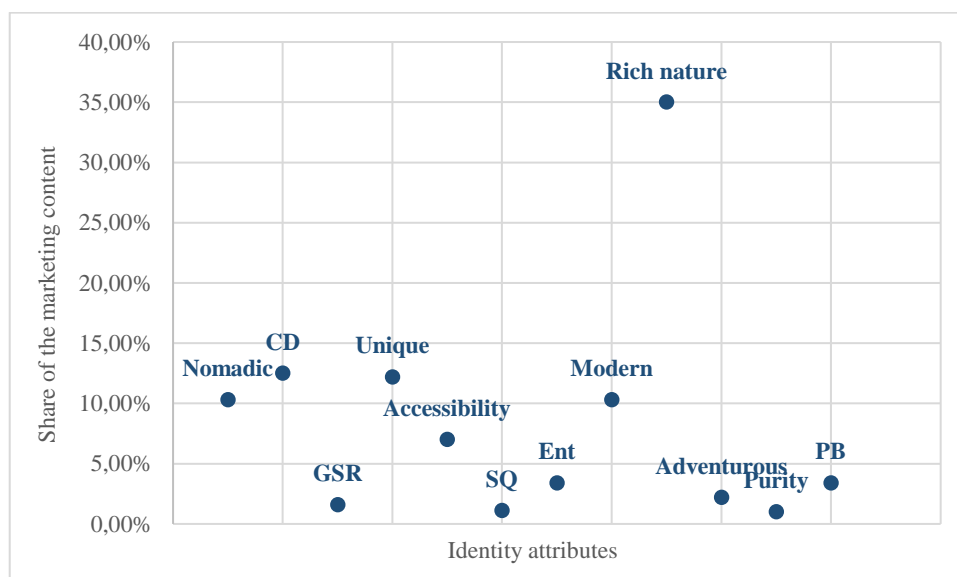


C) Travel articles

When it comes to travel articles, Kazakhstan is significantly described as the country possessing beautiful natural landscapes (35% of relevant counts). Second most frequent characteristics depicts destination as culturally and ethnically diverse (12.5%). Uniqueness of the place is mentioned relatively often as well (12.2%).

Figure 15 demonstrates that substantial presence is occupied by the attributes referring to Kazakhstan as developed and modern country with rich nomadic history and traditions (10.3% of relevant counts each). The lowest level of marketing presence characterises attributes of “Great Silk Road”, “Pristine beaches” and “Purity” attributes (6% combined).

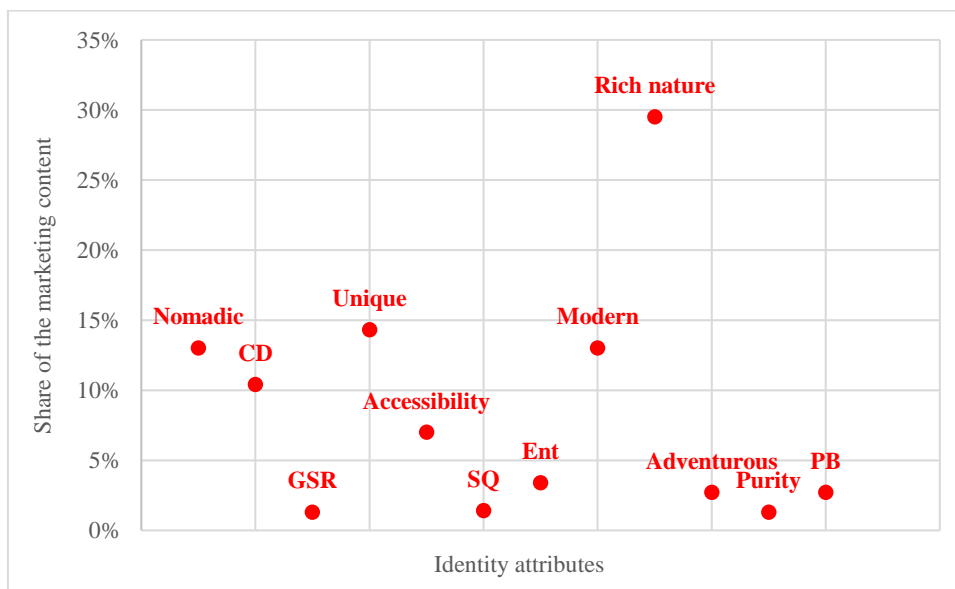
Figure 15. Presence of Attributes in Travel Articles



D) All communication channels combined

Generally, the main destination identity trait that leads throughout all channels is “Rich nature” with nearly 30% of relevant counts. Three attributes, describing country as unique, modern but with preserved nomadic heritage, share similar level of presence and constitute 40.3% of the core message. It is followed with portrayal of Kazakhstan as culturally diverse and accessible destination that provides a range of entertainment activities (nearly 21% of counts). The least presented attributes are “Great Silk Road”, “Pristine beaches”, “Adventurous”, “Purity” and “Service Quality” in total not exceeding 9.5% of the counts. Figure 16 below summarises relative share of the attributes within all communication channels.

Figure 16. Total Brand Attributes Relative Promotion



As stated by Pilcher (2014) the rule of thumb for an effectively communicated message is to have a 3-4 identity traits that are repeatedly promoted throughout all channels. It creates sufficient media weight to foster brand awareness and trust.

Clearly, Department transmits a cluster of messages. This makes it challenging to the target audience to capture the identity of destination. Apart from that, data shows that each channel has different pool of most advertised traits. This also leads to vague and obscure understanding of destination identity.

Criteria 3. Distribution of emotional/functional appeal

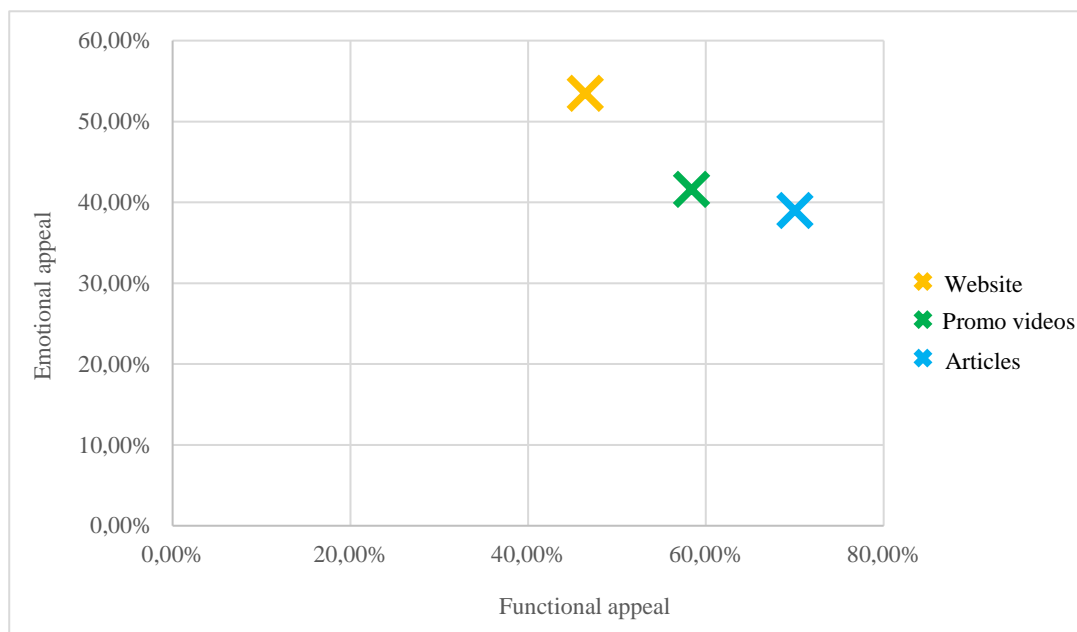
In terms of emotional/functional appeal of marketing message, functional dominates within travel articles (70% of counts) and promotional videos (58.3%) as shown by Figure 17. This does not correspond to the requirements of branding stages of awareness and interest.

The latter require 50% and 40% of the counts to be functional for these communication channels.

Destination website fails to comply with the standard as well, While it should have 60% of functional appeal, it mainly uses emotional appeal (53.5%).

Taking into account all communication channels, the ratio of functional to emotional counts is 1.4 to 1. Evidently, the Department needs to establish balanced 50/50 ratio of emotional/functional appeal within its marketing campaign.

Figure 17. Functional/Emotional Appeal of the Promotional Content



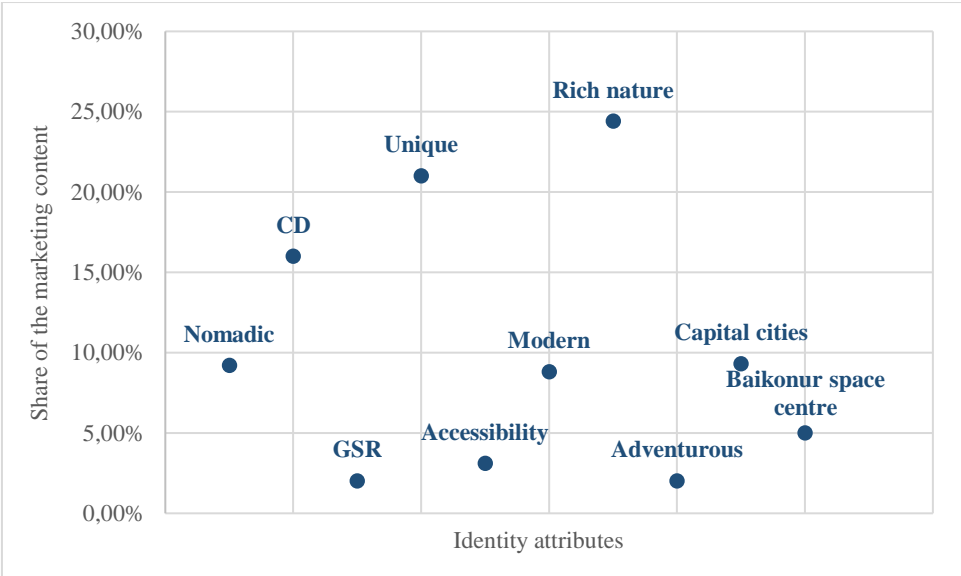
Thus, assessment of DMO’s branding message has shown notable communication flaws and delivered the following conclusions:

- Relevancy: marketing content of destination website and travel articles regarding Kazakhstan should be more precise and related to the desired identity traits.
- Concentration and frequency: the quantity of promoted Kazakhstan identity traits should be reduced.
- Depending on the communication channel, corresponding ratio of emotional/rational appeal of marketing message should be applied.

In order to conclude how effective is overall branding message, it is essential to look at the brand identity projected by industry stakeholders. From the diagram below we can easily identify 3 groups of brand identities communicated by stakeholders.

First group holds 61.4% of relevant counts and tells potential tourists that Kazakhstan is the destination with the rich natural landscape, unique experience and diverse cultural heritage. Second combination of traits (27.3% of counts) describes country as the one that developed modern innovative infrastructure, while preserving its nomadic legacy, traditions and customs. In addition to this, country is largely promoted via two major capital cities (Astana, Almaty) and world’s largest space launch facility Baikonur. The least mentioned set of traits (12.1% of counts) portrays Kazakhstan as accessible and adventurous destination that is remarkable for being part of the ancient Great Silk Road.

Figure 18. Brand Identity Traits Promoted by Industry Stakeholders



The table below summarizes relative share of Kazakhstan brand identity traits in marketing content of industry stakeholders and DMO. It also illustrates main similarities and differences between them.

Table 11. Comparison of Promoted Brand Attributes between the Department and Industry Stakeholders

Brand Identity Attributes	Weighted percentage of the promoted content (%)	
	DMO	Industry stakeholders
Rich nature	29.50	24.40
Unique	14.30	21.00
Nomadic	13.00	9.20

continued

Brand Identity Attributes	Weighted percentage of the promoted content (%)	
	DMO	Industry stakeholders
Modern	13.00	8.80
Cultural diversity	10.40	16.00
Accessibility	7.00	3.10
Capital cities	<1.00	9.30
Baikonur space centre	<1.00	5.00
Great Silk Road (GSR)	1.30	2.00
Adventurous	2.70	2.00
Entertainment	3.40	<1.00
Service quality	1.40	<1.00
Purity	1.30	<1.00
Pristine beaches	2.70	<1.00

It is evident that businesses and DMO are both largely promoting rich natural landscape of Kazakhstan. Uniqueness of the destination and cultural diversity have greater share in the marketing content of industry stakeholders, while Department leads in promotion of country's modern infrastructure, nomadic heritage and accessibility of the region.

The next crucial difference is that businesses tend to represent Kazakhstan via two major cities, Astana and Almaty. Although Department mentions both cities within its marketing message, it has less distinction within its marketing content in comparison to stakeholders. The same observation relates to Baikonur space centre that has more substantial presence in the communication of businesses than DMO.

Traits that connect Kazakhstan identity to Great Silk Road and adventurous tourism have minor share in the marketing space of both Department and businesses. Service quality, purity of the region and its pristine beaches take little space in the DMO's branding campaign. Nevertheless, their presence is three times larger than in the content communicated by businesses (in total 1.5% of the counts).

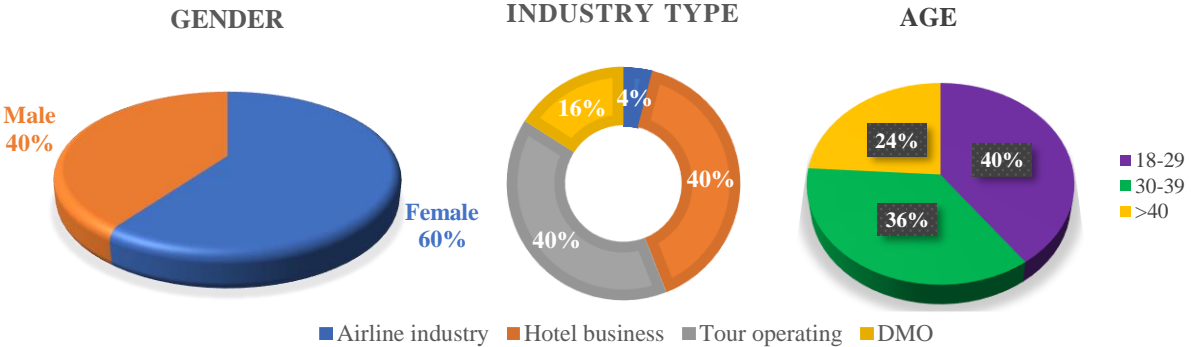
To sum up, the branding message projected by DMO and industry stakeholders can be defined as relatively heterogeneous. Despite the fact that the majority of the promoted traits are similar, there is a consistent divergence in terms of attributes' relative importance within the marketing content of two samples. Therefore, there is a gap within a communicated brand identity.

4.2 Evaluation of desired – communicated brand identity gap

Of the 25 survey participants, 60% are female and 40% are male. Majority of respondents are in the age range from 18 to 29 and 30 to 39 (40% and 36% correspondingly). Sample size included representatives of airline, hotels, tour operating industry and destination management organisations.

It is important to note that the results illustrate the opinion of a group of stakeholders that promote Kazakhstan internationally. The research focuses on evaluation of branding effectiveness, therefore opinions of the rest of industry actors like restaurants, domestic transport facilities and other services that are not involved in destination marketing, are not taken into consideration. Figure 19 sums up characteristics of survey participants.

Figure 19. Characteristics of Questionnaire Respondents



Overall, there are few brand identity traits communicated by the Department that were positively rated by industry stakeholders. Specifically, respondents assigned the highest rating for destination rich nature (M=4.80, SD=0.41). It is congruent with the content analysis results of stakeholders' promotional material in which this particular identity attribute held dominant position.

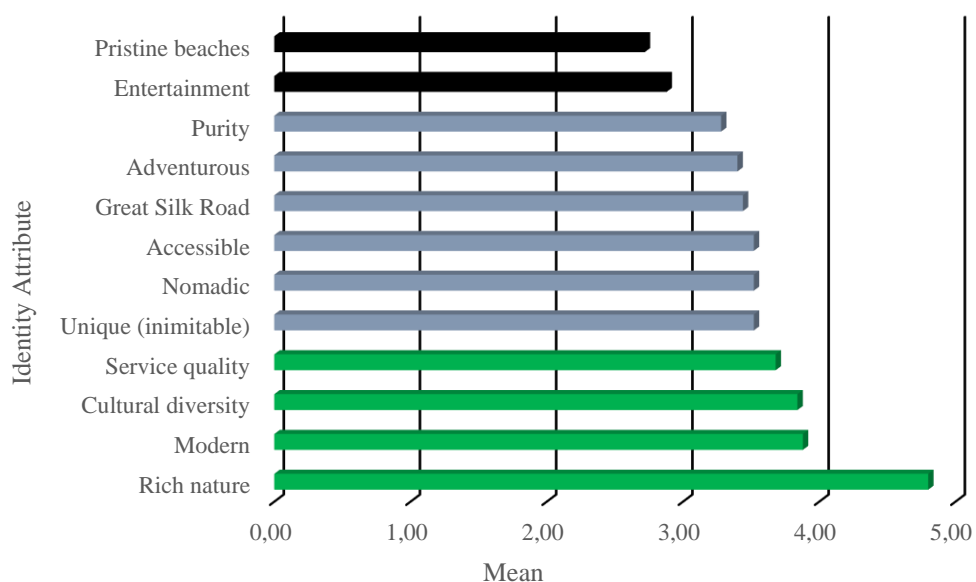
Identity traits of modern infrastructure (M=3.88, SD=0.83), cultural diversity (M=3.84, SD=0.94) and service quality (M=3.68, SD=0.80) received relatively high approval rates as well. Interestingly, the latter occupied minor share of marketing content of both the Department and stakeholders (1.40% and <1%). This is the first evidence of desired-communicated brand identity gap.

Attributes depicting country as unique, nomadic, accessible, pure and connected to the Great Silk Road on average obtained neutral ratings. In contrast, uniqueness of destination was second dominant trait within promotional message of stakeholders, which illustrates another difference in desired - communicated identity relationship.

Lastly, two destination traits got rated negatively: entertainment (M=2.88, SD=0.89) and pristine beaches (M=2.72, SD=1.1). It concurs with previously derived content analysis scores that showed less than one percent of the counts were related to forementioned attributes in the marketing message of stakeholders.

Figure 20 presents attributes in ascending order from the lowest to the highest mean. It is clear that from 12 attributes promoted by the Department, only four were marked as significant for detination brand identity communication. More detailed table with descriptives statistics can be found in Appendix F.

Figure 20. Stakeholders' Agreement with DMO Promoted Identity Traits



Independent samples t-test was performed to examine whether there is a difference in the brand identity assessment based on gender of the respondents (Appendix G). First difference was found in the pristine beaches attribute. Levene's test is significant ($P < 0.05$), meaning that variances are not equal within each of two groups. T-test shows that female respondents ($M = 3.13$) on average significantly rank pristine beaches higher than male participants ($M = 2.10$), $t(16.8) = 3.2$, $P < 0.025$ (two-tailed).

Second distinction is related to the accessibility of destination. Levene's test ($P > 0.05$) indicates existence of equal variances in both groups. As t-test illustrates, the attribute was significantly rated higher by male respondents ($M = 3.90$) than female group ($M = 3.27$), $t(23) = 2$, $P < 0.03$ (two-tailed).

Next, one-way analysis of variance (ANOVA) was conducted to see if there was a distinction in identity ratings among the participants from different age groups. F-test for each identity trait indicates that there are no significant difference among the means. Scheffe posthoc comparison, which tests differences between all pairs of means and controls type-I errors of wrongly accepting differences as significant (Mazzocchi, 2008), confirms the conclusion as well (Appendix H).

ANOVA was also used to check if there were any differences in the destination identity traits assessment depending on business activity of respondents (Appendix I). The distinction was detected in the purity attribute, $F(2) = 6.73$, $P < 0.05$. Scheffe posthoc test showed that DMOs ($M=4.50$, $SD=0.6$) rated purity of destination significantly higher than hotel businesses ($M=2.80$, $SD=0.6$). Another difference was identified with respect to nomadic identity trait, $F(2) = 3.78$, $P < 0.05$. Hotel entities on average marked the attribute lower ($M=2.80$, $SD=1.1$) than tour operating companies ($M=4.10$, $SD=1$).

As for the qualitative part of the survey that focused on determination of identity traits desired by stakeholders, several differences has been noted in comparison to the communicated destination identity (Appendix J).

First of all, more than half of the participants pointed out rich history of the destination. Unlike “Nomadic” trait which mostly relates to the medieval ages, respondents mentioned the need in promotion of soviet part of destination history. Particularly, remaining soviet nuclear sites and labour camp facilities.

Secondly, nearly half of the stakeholders stressed on the display of Kazakhstan as being “undiscovered”, “unknown”, “enigmatic” and “outlandish”. Evidently, existing destination brand identity communication lacks the presence of the mentioned traits. From the marketing perspective, DMO might capitalize on low brand awareness of the country among potential foreign tourists by presenting Kazakhstan as a “fresh, undiscovered, enigmatic” place.

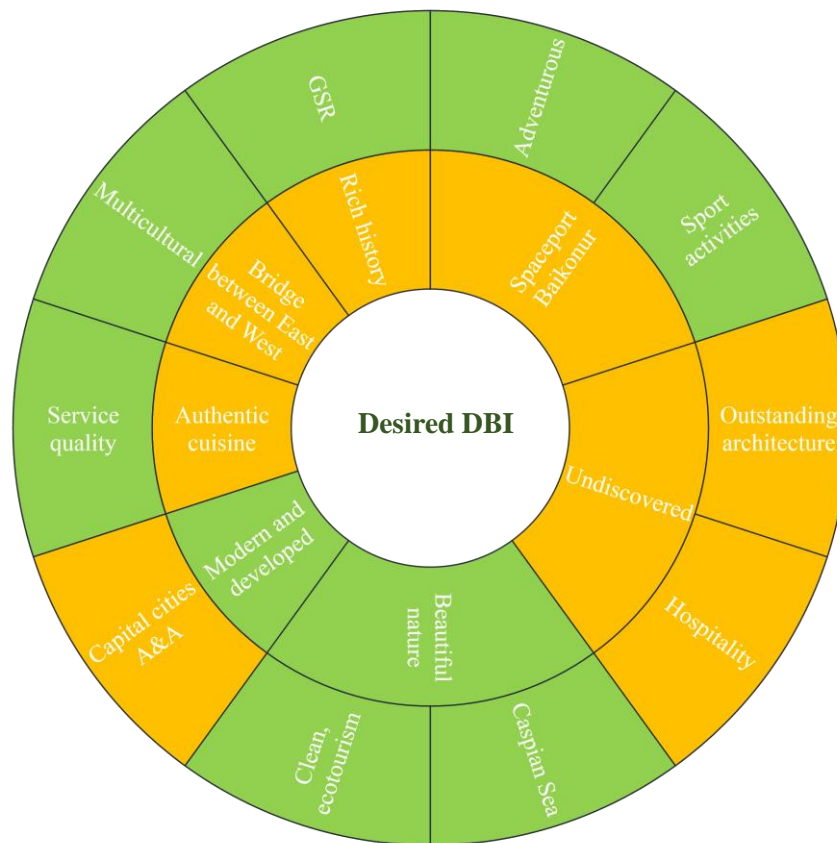
The same amount of responses mentioned the need in promotion of the role of the country in geographical and cultural terms. Namely, destination is seen as a “connection between East and West”, “bridge between eastern and western civilizations” and “mix of East and West”. It distantly relates to the “Cultural diversity” and “Great Silk Road” attributes that are being already communicated. However, the first one mostly describes multinational, multicultural status of the destination, while the latter creates associations with historical fact rather than with the present time. Therefore, it can be viewed as a separate identity trait which is currently not incorporated in brand communication.

Apart from that, almost third of the participants included country’s national cuisine in their DBI describing it as “authentic” and “special”. In addition, stakeholders perceived “the

world’s first and largest spaceport Baikonur” important for the identity of Kazakhstan. Furthermore, the deviation from the communicated identity traits also included “hospitality of locals” and “outstanding architecture”.

Figure 21 illustrates stakeholders’ desired identity traits. Yellow brackets represent deviation in relationship between desired and communicated destination brand identities. Green colour marks homogeneity between them. Destination identity attributes which are located closer to the centre were mentioned more frequently than the others. Thus, they constitute the core of the desired destination identity. Logically, destination identity traits, which took minor share of survey responses, were placed on the periphery.

Figure 21. Stakeholders' Desired DBI



Thus, we identified eight traits which were not represented in the brand identity promoted by national DMO. Among these traits, only two were communicated by stakeholders according to the results of content analysis performed previously. Specifically, they included “Space centre Baikonur”, “Capital cities of Astana and Almaty”.

In addition, out of 12 brand identity attributes that the Department intends to advertise, only four were strongly approved by stakeholders, namely “Rich nature”, “Modern”,

“Cultural diversity” and “Service quality”. Two attributes were predominantly marked as not critical for representation of destination: “Pristine beaches” and “Entertainment”.

The evidence clearly indicates a substantial divide between desired and communicated brand identities. As for commonalities, we can see that only two desired traits strongly correspond to CBI, namely “Beautiful nature” and “Modern and developed”. Majority of peripheral traits are congruent with CBI as well, albeit occupied insignificant share of survey responses.

4.3 Analysis of umbrella branding of Kazakhstan

4.3.1 National DMO and industry stakeholders

The first point to highlight in the comparison between national DMO brand and sub-brand of industry stakeholders is that the latter is not represented by one organisation. National brand of Kazakhstan is established and managed by the Department of Tourism, while businesses have independent marketing strategies. Therefore, the sub-brand of stakeholders which is presented in the network below is a summation of their different strategies. Evidently this creates a barrier to more efficient promotion of the country.

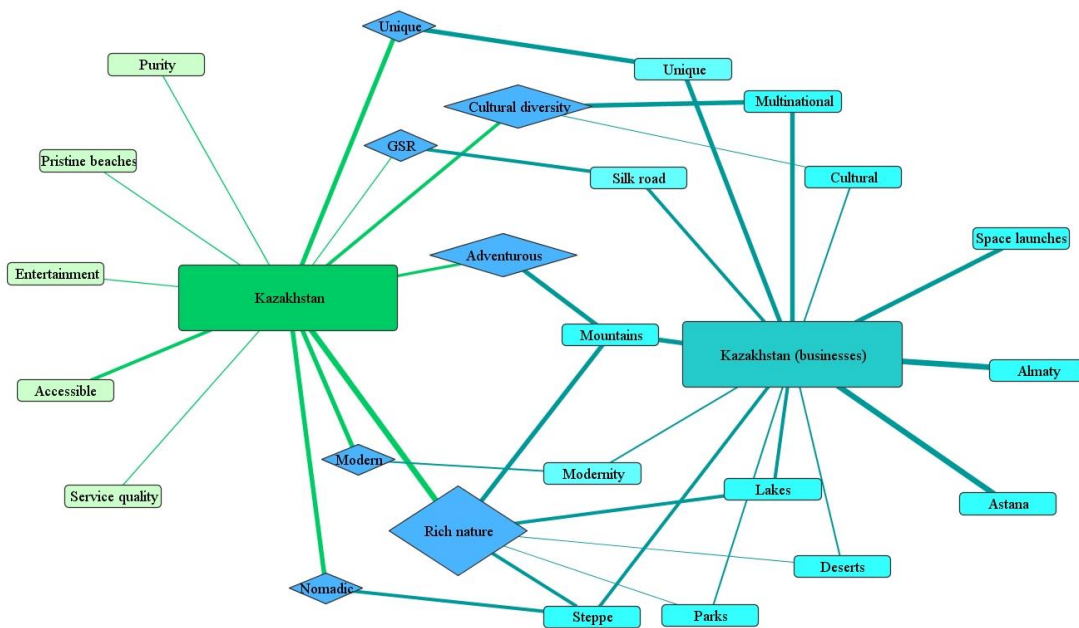
The analysis revealed that there are seven national brand attributes that play the role of umbrella brand for the traits promoted by stakeholders. Looking at the bottom half of the network, it can be seen that businesses promote mountains, steppes, parks, lakes and deserts. All of them relate to the “Rich Nature” country brand attribute. It is worth mentioning that stakeholders market mountains using adventure appeal too. That is why it strengthens another national brand attribute “Adventurous”, which, as the link width shows, is not prioritized by DMO. The node “Steppes” has additional connection as well, namely to the country brand attribute “Nomadic”. Besides that, stakeholders have minor support of the trait “Modernity”, linking their sub-brand to the DMO’s brand attribute “Modern”.

When it comes to the top half of the network, it can be easily noted that important part of the sub-brand represents nodes “Multinational”, “Unique” and “Silk road”. While first two join the respective attributes of the national brand that are largely supported by DMO, the latter reinforces the poorly promoted attribute of the “Great Silk Road”.

The crucial difference is that the core traits of the sub-brand (Astana, Almaty and Space launches) have no established relation to the national brand attributes. In addition to this, it is important to point out that some businesses still use 2007 version of destination logo and slogan (“Kazakhstan - heart of Eurasia”). The newly accepted slogan (“Kazakhstan - the land of the Great Steppe”) is poorly represented in the marketing content of the industry stakeholders. Undoubtedly it damages branding process of the destination.

It is evident that overall there are four key umbrella attributes that are strongly promoted by both DMO and stakeholders. Those attributes include “**Rich Nature**”, “**Unique**”, “**Nomadic**” and “**Cultural Diversity**”. Figure 22 illustrates the network connections between sub-brand and national brand. As previously explained, the thickness of the links signifies the extent to which the trait is present in the marketing message. Umbrella attributes are depicted with blue colour and rhombic shape. The size of the rhombus depends on the strength of connection between sub-brand identity traits and the national brand attribute.

Figure 22. Network of the Traits Promoted by Department and Stakeholders



4.3.2 National DMO and DMO of Astana

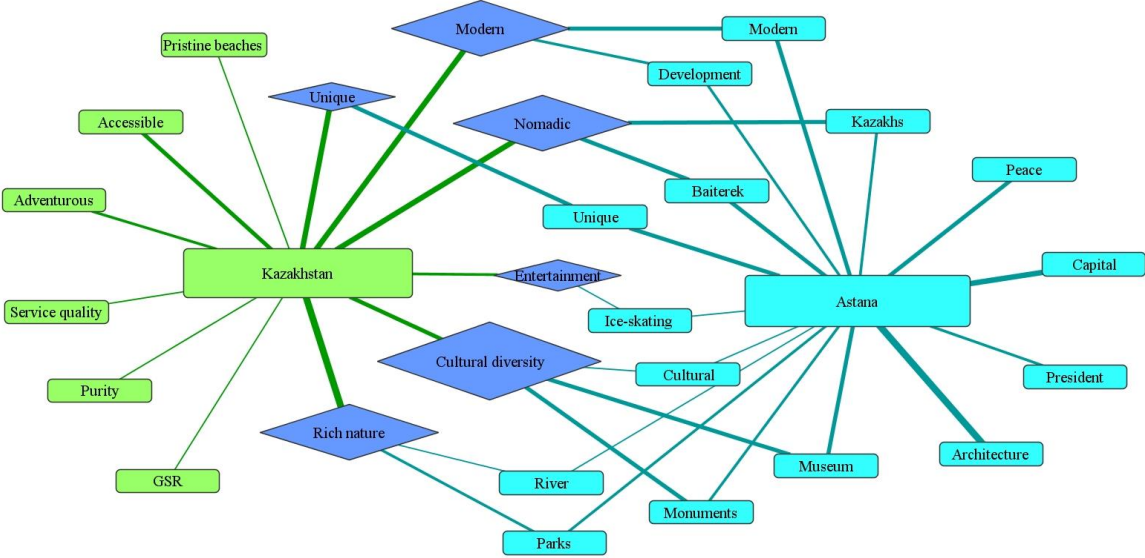
Network analysis of Astana sub-brand and national destination brand shows existence of a close cohesion between them. In the upper part of the network, the traits “Development” and “Modern” illustrate strong connection with the country brand attribute “Modern”. The next trait is named “Baiterek” which symbolizes the “tree of life” in the legends of nomadic tribes. In the pair with the trait “Kazakhs”, they form strong link to the national brand attribute “Nomadic”. In addition to this, both DMOs emphasize the uniqueness of the promoted destinations.

Lower part of the network displays powerful ties between sub-brand traits “Monuments”, “Museums” with national attribute “Cultural Diversity”. One more commonality between the brands is that they marginally support the attribute of “Entertainment”.

Major distinction between the brands lies in the fact that Astana DMO has a minor share of nature promotion, which is top identity attribute of the national brand. Apart from that, the sub-brand heavily focuses on advertising of the urban environment, city’s architecture, which semantically contrasts the attribute of nature as well. It also significantly accentuates the association of the city with its status of capital and the name of the President of the country. Although both traits relate to the country in general, they do not construct the core identity of the national brand.

Lastly, Astana is positioned to a great degree as a capital of peace, the home for many religions and nationalities. It has a slight referral to the attribute of “Cultural Diversity”, however forms independent node due to the character of the tourist message appeal. Motivation of visiting the country because it is culturally diverse is different from it being peaceful. As network shows, important national brand attributes like “**Unique**”, “**Modern**”, “**Nomadic**” and “**Cultural Diversity**” are well supported by the sub-brand.

Figure 23. Network of the Traits Promoted by Department and DMO of Astana



4.3.3 National DMO and DMO of Almaty

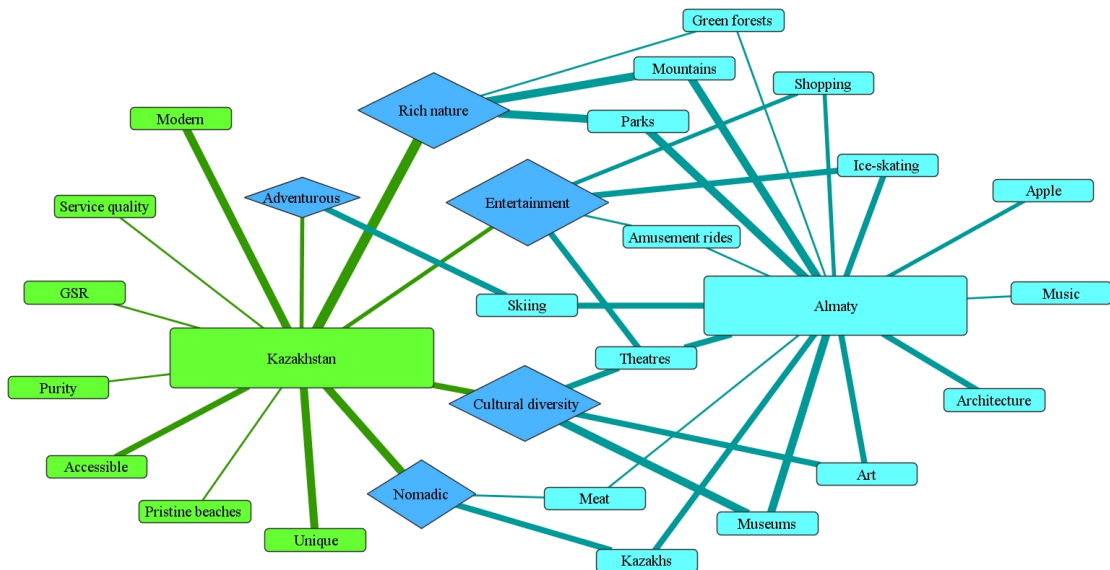
DMO of Almaty significantly fosters the brand identity of the city in connection to the mountains, green forests and parks. As a result it provides weighty support for the national brand attribute “**Rich Nature**”.

Second most important sub-brand traits include art, museums and theatres. Consequently it establishes a good connection with “**Cultural Diversity**” attribute. As a matter of fact, Almaty is commonly called as city of art, cultural capital of Kazakhstan. Another well mentioned traits, “Kazakhs” and “Meat”, link sub-brand to the “**Nomadic**” attribute, since it mostly referred to the nomadic cuisine and heritage of kazakh people.

Unlike national DMO, Almaty sub-brand identity is better represented with entertainment nodes like shopping, ice-skating, theatres and amusement rides. Theatres are linked to the national brand twice: as a part of ethnic cultures and as a form of entertainment. One more distinction is that Almaty DMO, by strong advertising of “Skiing” trait, provides better representation of “**Adventurous**” attribute rather than the Department.

The city’s symbol is apple. Almaty from kazakh language literally means “apple father”. That is why the logo of the destination displays this particular fruit (Visit Almaty, 2017). Since it is a very specific part of sub-brand core identity, the node “Apple” was positioned as an independent one. Although one might argue it should be part of the “Rich Nature” attribute. What is pivotal to note is that the sub-brand has no relations to the attributes of “Modern” and “Unique” that are the part of national brand core identity. On top of that, the sub-brand has independently promoted nodes that appeal to destination’s beautiful architecture and national music.

Figure 24. Network of the Traits Promoted by Department and DMO of Almaty



4.3.4 National DMO and DMO of Aktau

Starting from the bottom of the network, it is noteworthy that the most prominent identity trait of Aktau represents Caspian Sea. Along with the nodes of “White mountains” and “Capes” it establishes the most powerful relation in the network, connecting sub-brand with the “**Rich Nature**” attribute of national brand. Since the “White mountains” are also portrayed as rare and unique, in combination with the nodes “Different” and “Underground mosques” they support national brand attribute “**Unique**”.

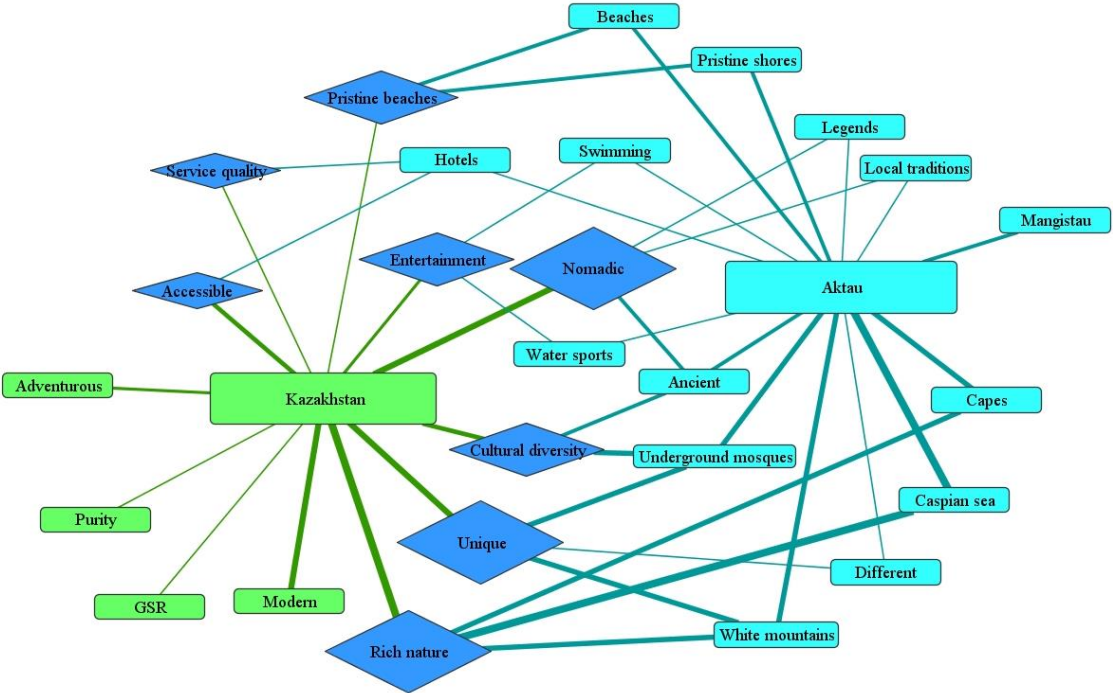
In addition, the trait of “Underground mosques” relates to the cultural life of the city. With the sub-brand identity trait “Ancient”, which depicts rich ethnic heritage of the destination, it establishes connection to the attribute “**Cultural diversity**”. For the reason that most of the location history concerns nomadic tribes and their heritage, this trait is additionally linked to the attribute “**Nomadic**”, which is also embraced by sub-brand traits “Legends” and “Local traditions”.

Similar to the Department, Aktau DMO slightly advertises entertainment activities (swimming, water sports). The sub-brand, to the minor extent, emphasises availability of hotels, which relates to the national brand attributes “Accessible” and “Service quality”.

The top of the network illustrates that Aktau is largely promoting “Beaches” and “Pristine shores”. This enables activation of the link between national brand attribute “Pristine beaches” and the sub-brand. It is important to highlight that since DMO focuses on promotion of the beaches as pristine and untouched, relevant visuals and text are used. That is why swimming as a trait does not constitute an important part of Aktau identity, because it would undermine the notion of them being crystal clean.

The only sub-brand node that is positioned separately is “Mangistau”. It is geographical name of the peninsula where the city of Aktau is located. Since the major access gates to the peninsula is Aktau, it is the destination name that is branded, although Mangistau remains an important part of sub-brand’s identity.

Figure 25. Network of the Traits Promoted by Department and DMO of Aktau



4.3.5 National DMO and DMO of Burabay

According to the network analysis, the most significant connection between national brand and Burabay sub-brand lies in the attribute “Rich Nature”. Burabay’s brand identity predominantly consists of traits describing lakes, mountains, rocks, forests and beauty of the landscape.

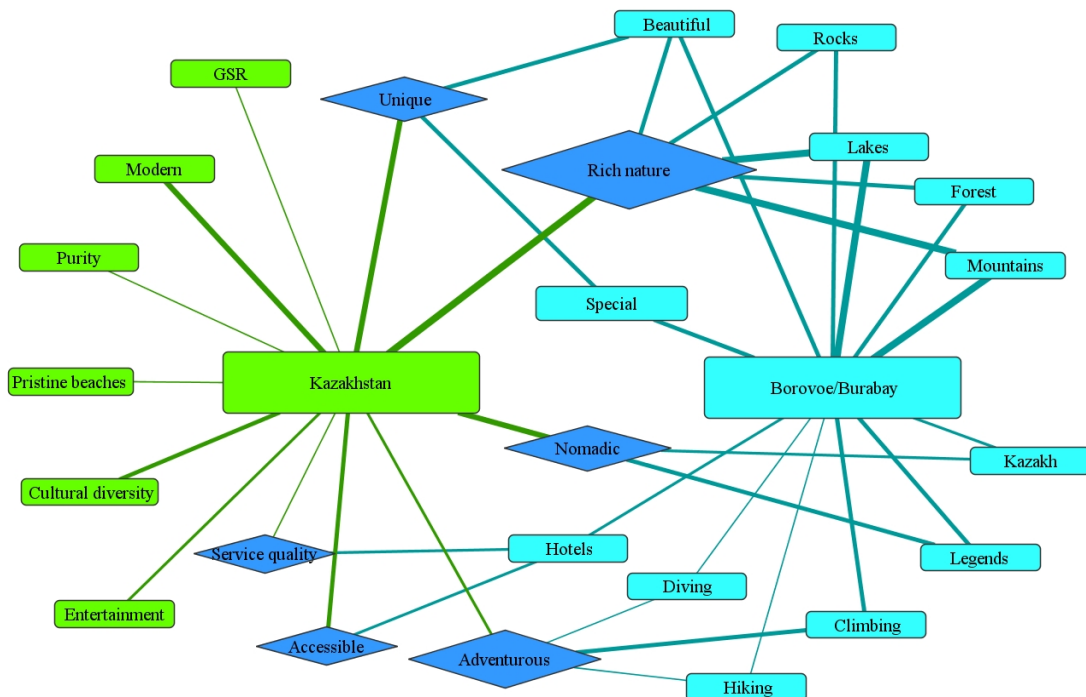
Second critical relation between the brands is the attribute “Unique”. Burabay is called as “Pearl of Kazakhstan”, due to its special location in the centre of kazakh steppe and beautiful, breathtaking landscape.

In the lower part of the network, sub-brand traits “Kazakh” and “Legends” establish relatively strong connection to the country brand attribute “Nomadic”. Apart from that Burabay brand identity incorporates nodes as “Climbing”, “Hiking” and “Diving” strengthening the national brand attribute “Adventurous”.

As in case with Aktau, Burabay brand frequently points out the availability of hotels, thus, appealing to the accessibility of the destination and its service quality.

Overall, Burabay sub-brand has only three profound connections to the attributes prioritized by national DMO, namely “**Rich Nature**”, “**Unique**” and “**Nomadic**”.

Figure 26. Network of the Traits Promoted by Department and DMO of Burabay



In terms of communication of the identity meaning, it is visible that sub-brands provide relatively substantial support for the national umbrella brand. However, there are significant differences in regard to prioritization of the attributes. Furthermore, there are several key traits of sub-brands that are not incorporated by national brand in principle.

It is also important to note that according to responses of the survey participants, the Department of Tourism does not directly involve them in destination branding. Stakeholders and regional DMOs implement their own destination marketing campaigns without purposeful efforts to maintain relationship with the national brand.

Visual analysis of the stakeholders' official websites confirms this conclusion. Out of 25 observed cases, only three have used destination logo. Companies applied photos of destination that predominantly displayed mountains, steppes, lakes and architecture of the capital Astana. Furthermore, just four stakeholders mentioned destination slogan in their promotional content (three of which applied outdated version of 2007). As for the promotional videos made by the Department, only two companies provided them on their websites (Appendix E). Given the importance of visuals in communicating brand meaning (Blain et al., 2005), author concludes that current level of collaboration between the Department and tourism industry stakeholders is not sufficient enough to confirm the existence of systematic umbrella branding in Kazakhstan.

4.4 Limitations and further research

This study was limited to evaluation of stakeholders that provided promotional information in English language. Since the number of such companies was low, the sample size of the questionnaire was small as well. That is why the results can be generalised only with respect to stakeholders targeting international tourist markets. Evidently, desired and communicated brand identity of stakeholders of domestic tourism can be significantly different.

Due to previously mentioned reason, some types of tourism stakeholders were not included in the assessment (restaurants, bus companies, train stations, entertainment facilities). The study findings operate with perspectives of tour companies, hotels, DMOs and airline Air Astana.

Last but not least, the study did not evaluate opinions of local people. It is arguable whether local population is on the supply or demand side of tourism. However, if we assume that they communicate the identity of the country via word-of-mouth, then they should be involved in the discussion.

Further research can build upon the developed framework and definitely should increase the sample size. Apart from that, scholars can perform the assessment of local population,

competition and compare how well stakeholders position and outline destination identity with respect to its competitors.

5 MAIN CONTRIBUTION

The main research question of this study was to determine how effectively is branding of Kazakhstan conducted as a tourist destination from the perspective of the suppliers. Majority of researchers emphasized the importance of customer-based brand equity when discussing the measurement of destination brand effectiveness. In fact, tourism research is dominated by growing number of conceptual and empirical case studies devoted to tracking and assessing destination brand equity from tourist point of view (Mak, 2010). That is why this study represents an attempt to fill outlined research gap.

Apart from answering the research question, this master thesis provided an important contribution in the form of developed methodological framework. Several research methods and critical destination brand concepts were combined in order to perform systemic analysis of destination branding effectiveness from the supply side point of view. Therefore, it can be used as a blueprint for performing thorough analysis of brand identity communication and evaluation of stakeholders' involvement in it.

In addition, the study complements existing research in the field of destination brand studies and contributes to further operationalisation of destination brand effectiveness assessment.

Ultimately, this thesis provides useful insights into branding effectiveness of Kazakhstan that can be taken into consideration by relevant stakeholders when developing country level marketing campaigns.

CONCLUSION

The main focus of the study was to evaluate branding of Kazakhstan's tourism by critical evaluation of stakeholders' actions. The empirical research included quantitative analysis (questionnaire, network analysis, conventional, summative content analysis) and qualitative analysis (semi-structured email interview, open-ended questions in the survey).

Relating to first research sub-question, results of content analysis showed inappropriate usage of emotional and rational appeal in communication channels. The frequency of counts referring to identity attribute showed significant irrelevance of marketing content presented on destination website and sponsored travel articles. Reviewing volume of repetition of identity attributes, the author concluded that Department has to limit the number of promoted identity traits to achieve effectiveness of their communication. Current repetition volume is spread across 12 different attributes which makes marketing

message diffusive and, therefore, less impactful (Financial Brand, 2016). But most importantly, content analysis revealed notable differences in promotion of DBI. Thus, the answer for the first research sub-question is that brand identity communicated by stakeholders and DMO is heterogeneous. It evidently decreases branding effectiveness.

Next, on the basis of questionnaire responses, the author checked the extent to which stakeholders support identity attributes promoted by DMO. In line with findings of stakeholders' desired brand identity, it helped to identify significant gap between desired and communicated brand identities. Obviously, it points at lack of collaboration between stakeholders and the Department (second research sub-question) and diminishes branding effectiveness.

Last but not least, performed network analysis revealed major destination umbrella attributes shared by both national brand and sub-brands. A number of identity traits uniquely associated with sub-brand were detected as well. In contrast, visual analysis of stakeholders' websites showed extremely low level of connections to the national brand. Reviewing survey responses, in regard to question that specified forms of cooperation between the Department and stakeholders, led me to conclusion that industry has not applied systematic umbrella branding efforts. This is the answer to third research sub-question.

Overall, Kazakhstan faces several issues with respect to destination branding effectiveness. As study findings show, there is a need in establishing more focused destination identity. Such identity should be generated and expressed in logo, slogan and promotional video. This process has to be done in close cooperation with critical industry stakeholders. In the end, developed visuals should appropriately be present in promotional material of destination stakeholders.

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APPENDIX A. Abbreviations Used

CBBE – customer-based brand equity

CBI – communicated brand identity

CD – cultural diversity

CIS - Commonwealth of Independent States

DBE – destination branding effectiveness

DBI – destination brand identity

DMO – destination management organisation

GSR – Great Silk Road

PB – pristine beaches

ROBI – returns on brand investment

SQ – service quality

UNWTO – United Nation World Tourism Organisation

WTTC – World Travel and Tourism Council

APPENDIX B: Interview with the Representative of Department of Tourism

Interviewer: Ruslan Kiimbayev

Interviewee: representative of the Tourism Department (requested to keep the anonymity)

Date: response was received on 15.02.2017

1. Please, describe destination identity of Kazakhstan that national tourism office promotes in marketing campaign.

We try to position Kazakhstan as the country with rich cultural heritage of nomadism. Showing that the cultural landscape here is unique, colourful and diverse due to 56 ethnic groups living in the country that have different customs, traditions, religions, rituals and holidays. We want to illustrate that during the nomadic period Kazakhstan was a part of international trade route between east and west via Great Silk Road.

Also we want to highlight good service quality experience supported by innovative infrastructure, comfortable transport and accommodation accompanied with various entertainment facilities. This makes the country easily accessible and enables development of tourism.

Apart from that Kazakhstan is promoted as a vast range of pure and wonderful landscapes from deserts bordering the lake that is half salt and half fresh to high mountains with modern ski resorts. It is basis of our adventurous ecotourism. Additionally, we present us as unique opportunity to experience sea, sun and sand tourism on the eastern shore of the world's largest inland sea – Caspian sea.

2. What marketing tools are used by national tourism office in branding the destination?

We actively promote Kazakhstan via official destination website: www.visitkazakhstan.kz. It is also important for us to broadcast promotional videos about the country on the main mass media channels, namely Euronews, CNN, Discovery, BBC. Sometimes we invite foreign bloggers and journalists to visit and write about their experience of Kazakhstan. This way we had articles published in National Geographic and Lonely Planet. Astana Times writes about tourism in Kazakhstan quite frequently as well. We try to create positive image of the country by organizing international sporting events like Winter Asian Games, Universiade, World Ski Jumping competition. Every year we organize international tourist fairs and exhibitions. This year we are hosting international exhibition Expo. Additionally, our diplomats in foreign countries distribute national souvenirs that promotes destination as well.

3. Please, specify whether local DMOs (Almaty, Astana, Burabay or Aktau) promote destination under national umbrella brand.

Department does not involve in local marketing. We have independent promotional campaigns. But local tourism departments may always request the expertise of the main office.

APPENDIX C: Questionnaire

Dear ____ representative,

You are invited to participate in academic survey devoted to identification of destination brand identity in case of Republic of Kazakhstan. The ultimate purpose of the research is to determine branding effectiveness of Kazakhstan as an attractive tourism destination.

Your participation in this survey is completely voluntary. Your responses will remain confidential. Please answer the questions of the online questionnaire as best as you can. It should take approximately 10 minutes to complete. The web link to the survey is provided here: Tourism Brand of Kazakhstan.

As a benefit from participation in this survey, you will receive final summary report on the completion of the research project.

If you have questions at any time about the research, feel free to contact:
- researcher: Ruslan Kiimbayev, kiimbayev@gmail.com

Question 1. What brand identity of Kazakhstan, do you think, should be promoted to foreign tourists?

Question 2. How do you cooperate with the Department concerning destination branding? Please specify if you implement your marketing campaign under the national umbrella brand?

Question 3. Please indicate to what extent do you agree these identity attributes should be included in tourism branding of Kazakhstan. (From '1 = Strongly disagree' to '5 = Strongly agree').

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Don't know
Kazakhstan – centre of nomadic civilisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Country with cultural wealth and diversity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Heart of the Great Silk Road	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unique and inimitable destination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Don't know
Accessible for tourists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Destination providing quality tourist service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Centre of entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Country with modern infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rich nature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Destination for seekers of adventures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pure and untouched destination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pristine beaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Question 4. Please, specify the industry in which your company operates.

- Airline industry
- Hotel business
- Tour operating
- DMO

Question 5. Please specify your gender

- Female
- Male

Question 6. Please specify your year of birth

Thank you for your participation

APPENDIX D: Coding System for Content Analysis

Table 1. Coding Scheme for Content Analysis of Destination Promotional Material

Code	Description
Nomadic	Traits that refer to nomadic heritage of Kazakhstan and associations that evoke the nomadic trait like “steppes, horses, camels, eagle hunting, kumys.
Cultural wealth and diversity	Words showing Kazakhstan as a county with different ethnicities, diasporas, religions with numerous objects of art and history (opera houses, museums, UNESCO protected sights and etc).
Great Silk Road	Words implying existence of the silk road on the territory of medieval Kazakhstan (caravans, caravan sarays), cities of Taraz, Shymkent, Turkestan, Otrar that were centres of trade along the silk road.
Unique	Facts depicting Kazakhstan as a special destination: largest lake in the world, endemic flora and fauna, petroglyphs.
Accessibility	Words relating to the means of transportation to and within the destination (flights, airports, airlines, schedules, railway, bus connections), visa regime, currency exchange, language barriers, safety, availability of accommodation.
Service quality	Words mentioning hospitality and comfortable tourist service, 5* hotels and restaurants.
Entertainment	Traits that appeal to different entertainment activities (gambling, shopping, malls, parks, cycling, excursions and etc.)
Modern	Destination being displayed as the one with developed infrastructure, roads, numerous business centres, scientific laboratories, applications of green and safe energy (solar panels, wind turbines)
Rich nature	All traits promoting nature: grasslands, mountains, glaciers, forests, lakes, sea, rivers, deserts, waterfalls, flamingos and etc.)
Adventurous	Activities that imply leaving the comfort zone: birdwatching, rafting, sailing, skiing, ice-skating, boating, climbing, hiking, snowboarding, trekking and others.
Purity	Traits showing country as clean destination with green forests and fields. Emphasis on environmental protection, preserved ecosystems, ecotourism, sustainable development, untouched nature.
Pristine beaches	Words describing pure and clean shores of the Caspian Sea and Balkhash lake.

APPENDIX E: Application of Umbrella Brand Visuals by Stakeholders

Table 2. Summary of Visuals Presented on Official Websites of Tourism Industry Stakeholders

Stakeholder	National logo	Slogan	Country promo video	Front visuals
Air Astana	0	Heart of Eurasia	0	Mountains, lake
Almaty city tourism department	1	Land of the Great Steppe	0	Mountains, apple, snow leopard
Astana convention bureau	0	0	0	Astana architecture
Astana Expo	0	0	1	Astana architecture
Otrar travel	0	0	0	Horses
Sayat tour	0	0	1	Astana architecture
Compas tour	0	0	0	Baiterek, Astana architecture
Tourist Aktau	0	0	0	Mountains
Kochevnik	0	0	0	Steppe
Complete tour	0	0	0	Astana architecture
Turan Asia tour	0	0	0	Snow Leopard, nature
Nomadic Travel Kazakhstan	1	Heart of Eurasia	0	Mountians, lakes, steppes
Zhana Talap	0	0	0	Steppe
Hotel Kazakhstan	0	0	0	Mountains, cuisine, facilities
Rixos President Astana Hotel	0	0	0	Hotel room
Soluxe Hotel Astana	0	0	0	Hotel facilities
Radisson Hotel Astana	0	0	0	Hotel facilities
Hotel Duman Astana	0	0	0	Hotel facilities, national cuisine
Rahat Palace Hotel	0	0	0	Hotel facilities
Royal Tulip Almaty Hotel	0	0	0	Hotel facilities

table continues

continued

Stakeholder	National logo	Slogan	Country promo video	Front visuals
Intercontinental Almaty	0	0	0	Mountains, hotel facilities
Dostyk Hotel	0	0	0	Hotel facilities
Hotel Atakent Park Almaty	0	0	0	Hotel facilities
Aktau department of tourism	1	Land of the Great Steppe	0	Mountains
Burabay Damu	0	0	0	Mountains

APPENDIX F: Descriptives Statistics of Destination Identity Evaluation by Stakeholders

Table 3. SPSS Output for Descriptives

	N	Mean		Std. Deviation
	Statistic	Statistic	Std. Error	Statistic
Rich nature	25	4,80	,082	,408
Modern	25	3,88	,167	,833
Cultural diversity	25	3,84	,189	,943
Service quality	25	3,68	,160	,802
Unique (inimitable)	25	3,52	,193	,963
Nomadic	25	3,52	,239	1,194
Accessible	25	3,52	,165	,823
Great Silk Road	25	3,44	,209	1,044
Adventurous	25	3,40	,200	1,000
Purity	25	3,28	,196	,980
Entertainment	25	2,88	,176	,881
Pristine beaches	25	2,72	,212	1,061
Valid N (listwise)	25			

APPENDIX G: Independent Samples T-test

Table 4. SPSS Output for Group Statistics

Gender:		N	Mean	Std. Deviation
Nomadic	Female	15	3,33	1,234
	Male	10	3,80	1,135
Cultural diversity	Female	15	3,73	1,033
	Male	10	4,00	,816
Great Silk Road	Female	15	3,27	,961
	Male	10	3,70	1,160
Unique (inimitable)	Female	15	3,33	,900
	Male	10	3,80	1,033
Accessible	Female	15	3,27	,704
	Male	10	3,90	,876
Service quality	Female	15	3,47	,640
	Male	10	4,00	,943
Entertainment	Female	15	2,80	,862
	Male	10	3,00	,943
Modern	Female	15	3,87	,743
	Male	10	3,90	,994
Rich nature	Female	15	4,87	,352
	Male	10	4,70	,483
Adventurous	Female	15	3,53	1,060
	Male	10	3,20	,919
Purity	Female	15	3,40	1,121
	Male	10	3,10	,738
Pristine beaches	Female	15	3,13	1,187
	Male	10	2,10	,316

Table 5. SPSS Output for Independent Samples Test

		Levene's Test for Equality of Variances		T-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Nomadic	Equal variances assumed	,008	,930	-,955	23	,349	-,467	,489	-1,477	,544
	Equal variances not assumed			-,972	20,565	,342	-,467	,480	-1,466	,533
Cultural diversity	Equal variances assumed	2,887	,103	-,685	23	,500	-,267	,389	-1,072	,539
	Equal variances not assumed			-,718	22,201	,480	-,267	,371	-1,036	,503
Great Silk Road	Equal variances assumed	1,975	,173	-1,017	23	,320	-,433	,426	-1,314	,448
	Equal variances not assumed			-,979	16,860	,342	-,433	,443	-1,368	,501
Unique (inimitable)	Equal variances assumed	,575	,456	-1,198	23	,243	-,467	,389	-1,272	,339
	Equal variances not assumed			-1,164	17,527	,260	-,467	,401	-1,310	,377
Accessible	Equal variances assumed	1,167	,291	-2,000	23	,057	-,633	,317	-1,288	,022
	Equal variances not assumed			-1,912	16,458	,073	-,633	,331	-1,334	,067
Service quality	Equal variances assumed	,025	,875	-1,691	23	,104	-,533	,315	-1,186	,119
	Equal variances not assumed			-1,565	14,498	,139	-,533	,341	-1,262	,195
Entertainment	Equal variances assumed	,461	,504	-,548	23	,589	-,200	,365	-,955	,555
	Equal variances not assumed			-,538	18,192	,597	-,200	,372	-,981	,581
Modern	Equal variances assumed	,591	,450	-,096	23	,924	-,033	,347	-,752	,685
	Equal variances not assumed			-,090	15,564	,929	-,033	,368	-,816	,749
Rich nature	Equal variances assumed	3,883	,061	1,000	23	,328	,167	,167	-,178	,511
	Equal variances not assumed			,938	15,266	,363	,167	,178	-,212	,545
Adventurous	Equal variances assumed	,405	,531	,811	23	,426	,333	,411	-,517	1,184
	Equal variances not assumed			,835	21,284	,413	,333	,399	-,496	1,163
Purity	Equal variances assumed	6,419	,019	,743	23	,465	,300	,404	-,535	1,135

continued

		Levene's Test for Equality of Variances		T-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
	Equal variances not assumed			,807	22,999	,428	,300	,372	-,469	1,069
Pristine beaches	Equal variances assumed	14,715	,001	2,672	23	,014	1,033	,387	,233	1,833
	Equal variances not assumed			3,205	16,842	,005	1,033	,322	,353	1,714

APPENDIX H: ANOVA Test of Differences among Age Groups

Table 6. SPSS Output for ANOVA Test of Age Groups

		Sum of Squares	df	Mean Square	F	Sig.
Nomadic	Between Groups	3,340	2	1,670	1,189	,323
	Within Groups	30,900	22	1,405		
	Total	34,240	24			
Cultural diversity	Between Groups	,960	2	,480	,518	,603
	Within Groups	20,400	22	,927		
	Total	21,360	24			
Great Silk Road	Between Groups	2,504	2	1,252	1,165	,331
	Within Groups	23,656	22	1,075		
	Total	26,160	24			
Unique (inimitable)	Between Groups	2,418	2	1,209	1,342	,282
	Within Groups	19,822	22	,901		
	Total	22,240	24			
Accessible	Between Groups	,951	2	,476	,684	,515
	Within Groups	15,289	22	,695		
	Total	16,240	24			
Service quality	Between Groups	2,718	2	1,359	2,350	,119
	Within Groups	12,722	22	,578		
	Total	15,440	24			
Entertainment	Between Groups	2,907	2	1,453	2,032	,155
	Within Groups	15,733	22	,715		
	Total	18,640	24			
Modern	Between Groups	1,984	2	,992	1,489	,247
	Within Groups	14,656	22	,666		
	Total	16,640	24			
Rich nature	Between Groups	,011	2	,006	,031	,970
	Within Groups	3,989	22	,181		
	Total	4,000	24			
Adventurous	Between Groups	1,878	2	,939	,934	,408
	Within Groups	22,122	22	1,006		
	Total	24,000	24			
Purity	Between Groups	4,551	2	2,276	2,708	,089
	Within Groups	18,489	22	,840		
	Total	23,040	24			
Pristine beaches	Between Groups	1,318	2	,659	,564	,577
	Within Groups	25,722	22	1,169		
	Total	27,040	24			

APPENDIX I: ANOVA Test of Differences among Types of Activities and Scheffe Posthoc Test

Table 7. SPSS Output for ANOVA Test of Types of Activities

		Sum of Squares	df	Mean Square	F	Sig.
Nomadic	Between Groups	8,458	2	4,229	3,779	,040
	Within Groups	23,500	21	1,119		
	Total	31,958	23			
Cultural diversity	Between Groups	1,208	2	,604	,677	,519
	Within Groups	18,750	21	,893		
	Total	19,958	23			
Great Silk Road	Between Groups	1,008	2	,504	,424	,660
	Within Groups	24,950	21	1,188		
	Total	25,958	23			
Unique (inimitable)	Between Groups	3,458	2	1,729	1,963	,165
	Within Groups	18,500	21	,881		
	Total	21,958	23			
Accessible	Between Groups	1,200	2	,600	,851	,441
	Within Groups	14,800	21	,705		
	Total	16,000	23			
Service quality	Between Groups	2,333	2	1,167	1,885	,177
	Within Groups	13,000	21	,619		
	Total	15,333	23			
Entertainment	Between Groups	2,675	2	1,338	1,761	,196
	Within Groups	15,950	21	,760		
	Total	18,625	23			
Modern	Between Groups	1,683	2	,842	1,295	,295
	Within Groups	13,650	21	,650		
	Total	15,333	23			
Rich nature	Between Groups	,258	2	,129	,733	,492
	Within Groups	3,700	21	,176		
	Total	3,958	23			
Adventurous	Between Groups	3,808	2	1,904	2,203	,135
	Within Groups	18,150	21	,864		
	Total	21,958	23			
Purity	Between Groups	8,333	2	4,167	6,731	,006
	Within Groups	13,000	21	,619		
	Total	21,333	23			
Pristine beaches	Between Groups	,450	2	,225	,181	,835
	Within Groups	26,050	21	1,240		
	Total	26,500	23			

Table 8. SPSS Output for Multiple Comparisons based on Scheffe Posthoc Test

Scheffe							
Dependent Variable			Mean Difference (I-J)	Std. Error	Sig.	95% Confidence Interval	
						Lower Bound	Upper Bound
Nomadic	Hotel business	Tour operating	-1.300*	,473	,040	-2,55	-,05
		DMO	-,700	,626	,545	-2,35	,95
	Tour operating	Hotel business	1.300*	,473	,040	,05	2,55
		DMO	,600	,626	,638	-1,05	2,25
	DMO	Hotel business	,700	,626	,545	-,95	2,35
		Tour operating	-,600	,626	,638	-2,25	1,05
Purity	Hotel business	Tour operating	-,600	,352	,256	-1,53	,33
		DMO	-1.700*	,465	,006	-2,93	-,47
	Tour operating	Hotel business	,600	,352	,256	-,33	1,53
		DMO	-1,100	,465	,084	-2,33	,13
	DMO	Hotel business	1.700*	,465	,006	,47	2,93
		Tour operating	1,100	,465	,084	-,13	2,33

APPENDIX J: Stakeholders' Desired Brand Identity Traits

Table 9. Summary of Stakeholders' Desired Destination Brand Identity Traits

Desired Identity Traits	Communicated Identity Traits	N of cases
Natural beauty, breathtaking landscapes, picturesque mountains	√	16
Rich history (nomadic, soviet, nuclear test sited, labour camps)	–	13
Unknown, enigmatic, undiscovered, outlandish, unmarked	–	12
Connection between East and West, mix of East and West, bridge between EW	–	12
Authentic, special tasty national cuisine	–	10
Modern, developed, innovations, green technologies	√	9
Space tourism, spacesport Baikonur	–	6
Capital cities of Astana, Almaty	√	5
Sport activities, horse riding, skiing, iceskating	√	5
Multinational, multicultural	√	4
Clean, pristine, untouched, ecotourism	√	4
Hospitality of locals, respect to guests	–	4
Unique	√	3
Adventurous, discovery	√	3
Outstanding architecture	–	2
Quality tourist services	√	2
Caspian sea, beaches	√	2
Centre of the Great Silk Road	√	1