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Destination marketing: how to brand territories (Case of Kazakhstan)

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Table of contents

Abstract	2
Introduction	5
Literature review	7
Primary data	7
Branding - chosen definitions	7
Brand image theory by D. Ogilvy	8
Brand Equity theory by David Aaker	8
Brand awareness	9
Brand positioning	10
Brand awareness metrics by Philip Kotler	11
Branding Strategy and Consumer Behaviour	11
Lifestyle	12
Destination marketing - chosen concepts and definitions	13
Destination marketing definition	13
Elements of destination marketing	14
Nation branding	15
Thematic branding and geographic branding.	15
Event Branding	16
Secondary data	17
Characteristics of Kazakhstan	18
Geographical landscape characteristics	19
Overview of the chosen regions	23
City of Nur-Sultan	23
Burabay National Park	24
Nation branding: key milestones and problems	25
The connection between country brand, tourism, and economy	25
Elements of a successful destination marketing strategies	26
Destination identity and image	28
Stakeholder involvement	28
Effective destination management	29
Destination marketing organisational effectiveness: external and internal	30
Destination branding approaches	32
State of brand Kazakhstan	35
Expert's public opinion overview on Kazakhstan positioning	36
Business people's opinion	36
PR and branding specialists' opinions	36
Kazakhstan's place in international rankings	37
Methodology	38
Method and Techniques	38
	1

Research process	39
Research findings and Analysis	40
Interview results	40
Summary of observations	43
Observations in Nur-Sultan	43
Observations at Burabay National Park	43
Concluding remarks	44
Bibliography	46
Appendix A Interview Scenario	51
Appendix B Observational checklist for destination marketing elements and overall country attractiveness	54

Abstract

Destination marketing: how to brand territories (Case of Kazakhstan), by Aigerim Argimbayeva, HSE KAZGUU University, May 2022

This work is devoted to studying destination marketing and how to brand territories in the example of Kazakhstan. Over the past 30 years, due to globalisation and geopolitical changes, many countries have thought about the need to develop a country brand. As part of this study, we consider what work has been done to establish the brand of Kazakhstan, in what condition it is now and what are the prospects.

List of tables

Table 1. Brand equity model by David Aaker	9
Table 2. Marketing productivity metrics by Philip Kotler	12
Table 3. Elements of destination marketing adapted from Hankinson	15
Table 4. Destination marketing framework	26

List of illustrations

Figure 1. The map of Kazakhstan	20
Figure 2, Sunset on Balkhash Lake	21
Figure 3. Turgen Waterfalls in the Turgen Gorge region, South Kazakhstan	21
Figure 4. Camels in Kazakh Steppe in Summer	22
Figure 5. Burabay National Park, Northern Kazakhstan	22

I. Introduction

For the past 30 years, the Kazakhstan government has been working hard to establish the country's brand. Yet, we are still defining the country's positioning. So that now it is known as a very nice (The Guardian, 2020) 'stan' country (The Atlantic, 2014), the heart of Eurasia (MFA RK, 2012), or the Land of Great Steppe (The Astana Times, 2015).

Since the collapse of the Soviet Union in 1991, post-Soviet countries have begun work on developing a country brand to declare themselves in the international arena and cultivate a positive international image to become more attractive to investors and tourists (Somogy Varga, 2013). Changes in the geopolitical areas have prompted scholars, academics and policymakers to explore the field of nation branding and implement strategic marketing plans that help shape and change the global perception of a particular country in the eyes of a worldwide audience. Governments involved prominent international marketing and branding agencies and consultants for these purposes. Building a country's image and promoting a destination is about the long-term picture.

Since its Independence, Kazakhstan has positioned itself in official documents and tourist campaigns as a crossroads of civilisations, the Eurasian bridge, the heart of Eurasia, the bridge between East and West, and the Land of the Great Steppe. Those campaigns were targeted to different audiences, such as other governments, to create a more favourable image and be perceived as legitimate actors in the international arena. Foreign investors needed to ensure that the country was stable and safe to do business. Tourists - also are looking for stability and security, despite breathtaking landscapes. However, whether the country has a clear long-term brand development strategy remains unclear, looking at this abundance of epithets. There are several reasons for that. First of all, lack of literature about destination marketing and territory branding. Second, chaotic and inconsistent

attempts to build a country brand from the government side.

Within the framework of this study, the goal was to study destination marketing strategies of Kazakhstan: to identify how territories are promoted and whether there is a unified marketing positioning strategy for a country.

This research consists of four chapters. The first two chapters consist of a literature review of the main theories and definitions of branding, destination marketing and characteristics of successful marketing strategies; they also give a brief overview of the current situation. Chapter three contains the description of the methodology and research techniques. Finally, the study results obtained during observations and interviews are discussed in chapter four. Research results are applicable only for the case of Kazakhstan.

II. Literature review

1.1 Primary data

1.1.1. Branding - chosen definitions

To conduct the research, we decided on theories and definitions of brand given by Philip Kotler, brand image theory by David Ogilvy and David Aacker's theory on brand equity.

Philip Kotler, in his book "Principles of Marketing", claims that a brand is defined as a "name, term, sign symbol (or a combination of these) that identifies the maker or seller of the product" (Kotler, P., 2017).

Another essential brand definition is given by the American Marketing Association, which defines a brand the following way: a brand is a name, term, design, symbol, or any other feature that distinguishes the goods or services from other similar products or services from different sellers.

The ISO Brand Standards add that a brand "is an intangible asset" that is designed to create "distinctive images and associations in the minds of stakeholders, thereby creating economic benefit/value" (Calder, B. J. (2019).

1.1.1.1. Brand image theory by D. Ogilvy

According to David Ogilvy, a brand is the intangible sum of a product's attributes: its name, packaging, price, its history, its reputation, and the way it is advertised (Wireko-Andoh, V. (2016).

Ogilvy suggests six main ideas (Ogilvy, 1955):

1. Making a difference and creating unique brand characteristics that help gain a larger market share and profit.
2. Building a personality that determines a brand's position on the market.
3. Reflecting the self-image of the consumers.
4. Long-term investment in the brand to maintain a consistent brand image.

5. Considering comprehensive factors connected to brand image: name, packaging, price, etc.

6. Setting long-term goals that help brands grow and flourish.

Brand image and brand identity are interchangeable notions: the brand image is a general perception of the brand, while brand equity helps to construct the brand image.

1.1.1.2. Brand Equity theory by David Aaker

David Aaker (2009) defines brand equity as a set of brand assets and liabilities linked to the brand that add or subtract value to the product or service. On the scheme provided below are represented five components of brand equity: brand loyalty, brand awareness, perceived quality, brand association and other proprietary brand assets.

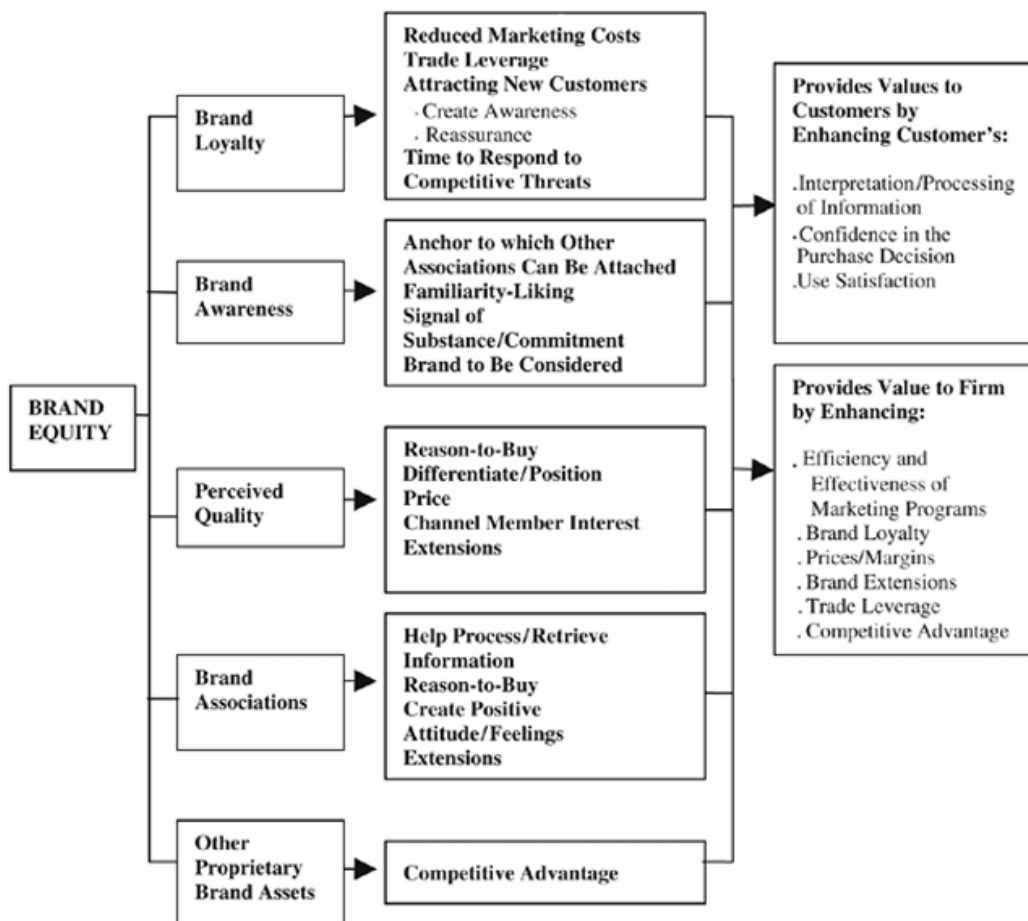


Table 1. Brand equity model by David Aaker (2009)

Brand loyalty is a core dimension of brand equity that influences marketing costs and brand exposure to the market through attracting new customers and reassurance and reduces the time needed to respond to competitive threats.

1.1.1.3. Brand awareness

Perceived quality of a product is customers' judgment of the brand compared to other products on the market; this is a reason-to-buy dimension that helps customers differentiate the brand from other brands (Baldauf, A., Cravens, K. S., & Binder, G., 2003).

Finally, Aaker (2009) states that brand associations represent the basis for purchase decisions and brand loyalty. Brand associations help process brand image, retrieve required information, create the reason to buy for customers and cause unique feelings and attitudes towards the brand. Other proprietary brand assets include additional brand features that form a competitive advantage.

1.1.1.4. Brand positioning

Kotler has defined *positioning* as the process of designing the company's offering and image to occupy a distinctive place in the mind of the target market (Akpoymare, O. B., Adeosun, L. P. K., & Ganiyu, R. A. (2013). Brand positioning is based on the destination's name, logo, and value proposition (slogan). The goal is to succinctly communicate the brand's identity that stands out from the noise of other mass communications of competing and replacement brands and is noticed by the target consumer in a meaningful and memorable way. It has been suggested that too many tourist destination slogans were less than catchy (see Dunn 2000, Morgan et al. 2003, Ward and Gold 1994) and that best practice was limited to a few simple slogans, like the 1970s. Development of the "I ♥ New York" campaign (Ward & Gold, 1994, p. 4): "The process of imitation, however, demonstrates a general lack of creative ideas and effectively ensures that the vast majority

of campaigns to promote places rarely manage to cross the threshold of ephemeral indifference". However, offer development is perhaps the biggest challenge in branding (Gilmore, 2002) and is especially challenging for multipurpose destinations.

In particular, studies analyzing the effectiveness of a single slogan in meeting consumer needs across multiple markets of interest to DMO stakeholders would be welcome; because the image of the destination may differ between regional markets (Hunt, 1975) and between different segments (Fakeye and Crompton, 1991, Phelps, 1986). A non-systematic approach negatively affects the image and positioning of the destination brand. Intelligent positioning of the brand of a tourist destination involves a balance between the impressions of guests about the image.

Much of DMO's day-to-day tactical operations are spent developing, implementing, and monitoring marketing communications that attempt to communicate the destination's brand position in the marketplace consistent with the focus on brand identity. It is now axiomatic that all marketing communications should reinforce brand identity.

1.1.1.5. Brand awareness metrics by Philip Kotler

Kotler (2016) states that brand awareness metrics help measure the performance of a brand and service team. He then introduced new metrics called performance awareness ratio (PAR) and brand advocacy ratio (BAR). The meaning of PAR and BAR metrics is described in the figure below, which explains how both ratios can be calculated.

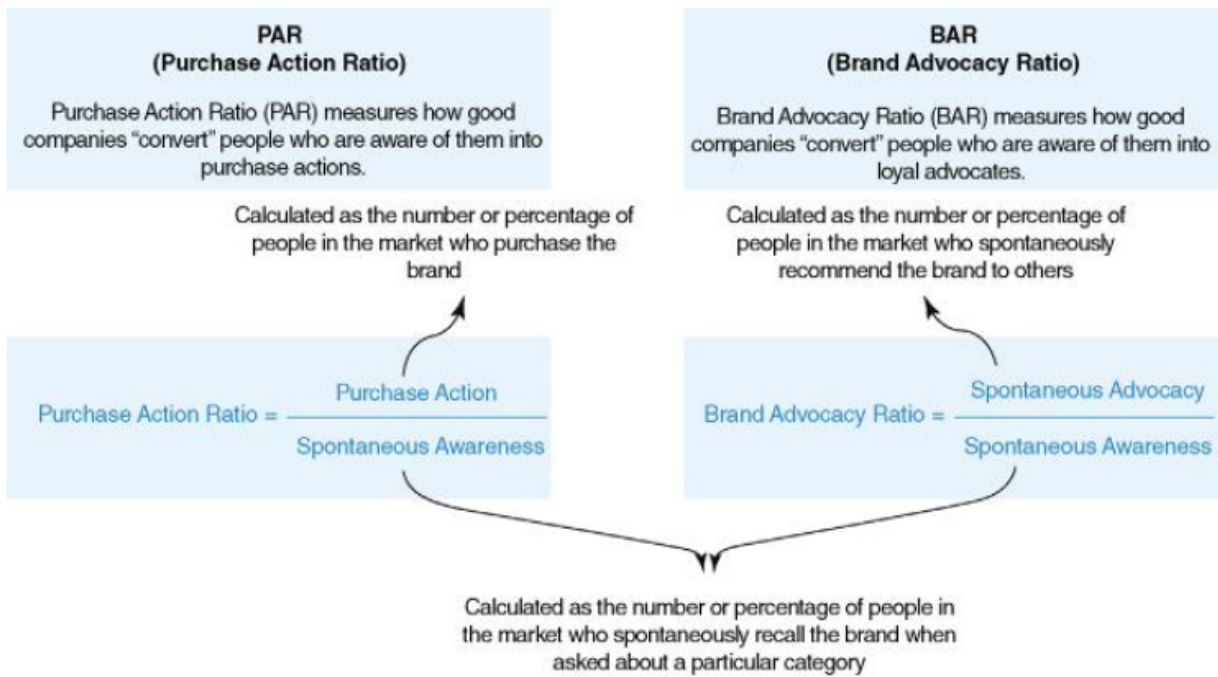


Table 2. Marketing productivity metrics by Philip Kotler (2016)

1.1.1.6. Branding Strategy and Consumer Behaviour

When developing a marketing strategy, we strive to lead a potential buyer to perform specific actions. In other words, we influence his behaviour. Consumer behaviour is defined as the study of the actions of consumers during the search, purchase, use, evaluation and disposal of products and services that they believe will satisfy their needs. The decision-making process can be divided into three stages:

1. Inputs (e.g., marketing mix, socio-cultural influences)
2. Process (e.g. recognition of need, information retrieval, evaluation and decision rules)
3. Outcome (e.g., purchase, use, post-purchase evaluation, storage and disposal, trust, and loyalty).

In the previous paragraphs, we have looked at various aspects of branding, such as Brand image, Brand awareness and brand positioning. When we work on developing a brand strategy, together, we create specific consumer images in the minds of consumers. Consumer imagery refers to consumer perceptions of all components of products, services,

and brands and how consumers evaluate the quality of marketers' offerings (Leon Schiffman, Joe Wisenblit, Consumer Behaviour, 2019).

1.1.1.7. Lifestyle

When we speak of consumer behaviour, it is important to mention lifestyles, or psychographics, which include consumers' activities, interests, and opinions. Psychographic variables also include shopping patterns, opinions about consumption and/or social issues, values, hobbies, leisure activities, and many other parameters. Psychographic data is generic, loosely defined, and, together with demographics, provides marketers with detailed descriptive profiles of target markets (Leon Schiffman, Joe Wisenblit, Consumer Behaviour, 2019).

When developing marketing campaigns, it is crucial to consider the lifestyle of the target audience to increase the effectiveness of the campaign. For example, suppose we are talking about the target audience of a ski resort. In that case, it is crucial to understand that this is usually an audience with a higher average bill and an appropriate living environment. Suppose we want to sell Kazakhstan as a country with excellent ski resorts when posting information. In that case, it is vital to consider the target audience's lifestyle, what media they watch, and what places they go. Lifestyle is also important to take into account when analyzing the competitive environment. Again, if we promote a ski resort, we are competing with other ski resorts that our target audience visits, i.e. with resorts in France, Austria, and Italy.

1.2. Destination marketing - chosen concepts and definitions

This chapter includes the following concepts and definitions: destination marketing, elements of destination marketing by Hankinson, nation branding by Simon Anholt, thematic and geographic branding, event branding and destination marketing in private and state sectors.

1.2.1. Destination marketing definition

The roots of territory branding lie in marketing actual products, such as food or beverages, and rely primarily on Philip Kotler's works. Kotler claims that the core idea of marketing is creating and delivering value to the target market by satisfying their needs (Kotler, P. 2012). American Marketing Association also stresses the importance of providing value in their definition of marketing (American Marketing Association, 2021).

As we discuss destination marketing within this research, it is necessary to define what is the destination. There are several definitions of the term "destination" some researchers define it as a place where people choose to travel to experience some features or characteristics (Leiper, 1995). Others define it as a perception concept, defined by demographic and psychographic characteristics, personal travel experience and reason for the visit (Buhalis, 2000). Thus, "destination" is presented by the physical place and its specialities and the experience the visitor goes through; these elements are interpreted and valued by tourists positively or negatively (Franzen, Bowman, 2001). The destination is determined not only by its natural characteristics (Shawn, Williams, 2004) but also by the set of utilities that shape the user experience.

1.2.2. Elements of destination marketing

Elements of destination marketing by Hankinson are presented in the figure below and include consumer relationships, primary service relationships, media relationships, and brand infrastructure relationships. All these elements are directly related to how the core brand is perceived: developing and managing these relationships on a high level in all these categories leads to efficient destination branding.

This concept is also known as a concept of brand networks where the place is developed as "relational brand networks", and emphasis is put on how consumers experience the brand, or in this case, branded site.

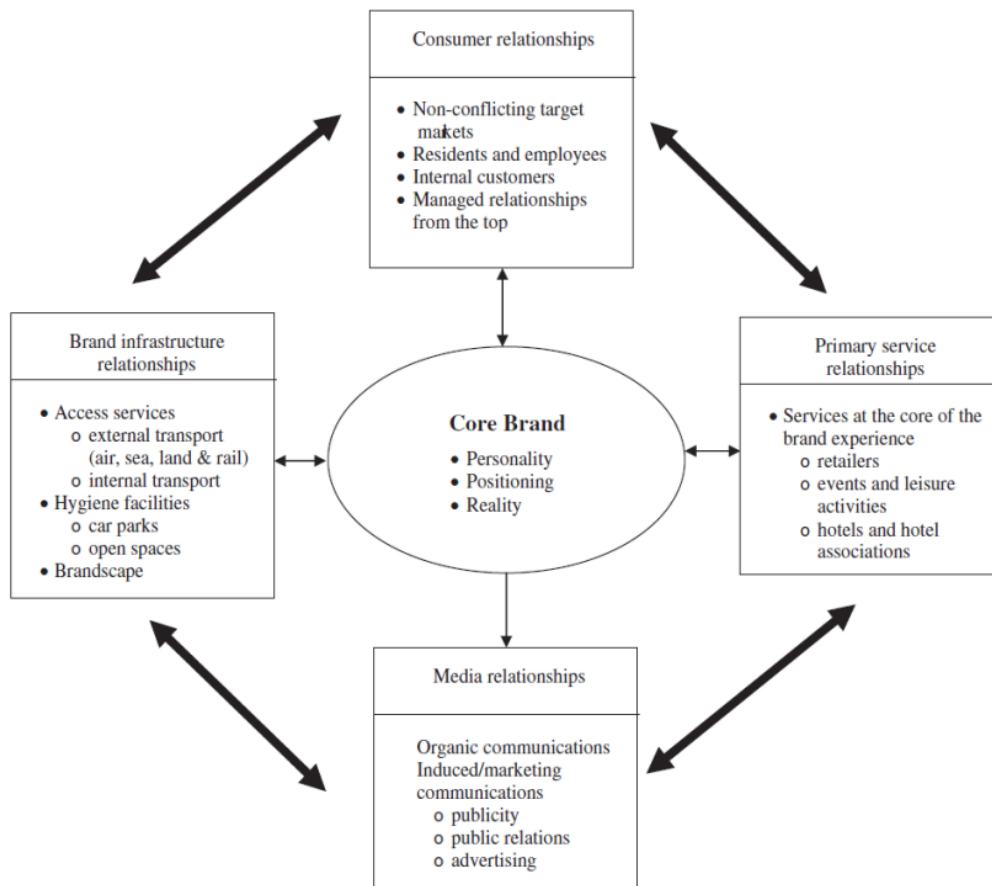


Table 3. Elements of destination marketing adapted from Hankinson (2004)

1.2.3. Nation branding

When discussing “nation branding”, the term often used by the Kazakstan government, Simon Anholt rejects it as many people perceive it as a bunch of marketing tricks and PR events (S. Anholt, 2009). Instead, he offers a “competitive identity” (S. Anholt, 2009).

Because once the term “branding” is in use, people perceive it as an image built for a particular place or destination, which is partially true. We fully agree with mister Anholt’s position because the term is broader than the PR campaign, image or reputation. In the work “Places: Identity, Image and Reputation”, Anholt insists on the idea that branding is not only about communications but rather policies (Anholt, 2009) that help to provide value to end customers, which we discussed at the very beginning of this chapter when defined

the term “marketing”. It leads to the idea that today’s world citizens’ became consumers of the territories, turning them into products (D. Haider, P. Kotler, I. Rein, 1993).

1.2.4. Thematic branding and geographic branding.

Among the possible directions for branding destinations (World Tourism Organization, 2010): are thematic branding, i.e. the uniqueness of the theme within the boundaries of this destination, and geographic branding. Geographic branding refers to branding within geographic boundaries (cities, regions, countries). For example, in France, a thematic wine brand has been developed, targeting a large audience by offering wine routes and products. That is, thematic branding affects the interests of a particular market segment and brings together the products and experiences that a destination can provide. All thematic brands must reflect their values when promoting a thematic brand and branded products belonging to a given destination.

Thematic branding can transcend to geographic branding and unite cities, regions and even countries (Central Asian states: Kazakhstan, Uzbekistan, Azerbaijan). In describing the differences and similarities between thematic and geographic branding of destinations, the World Tourism Organization (2010) has developed several comparative indicators of thematic and geographic branding:

- distance: the further the destination is from the target audience, the more critical it is to establish geographic branding;
- detailed definition of branding objects: if the destination has a set of various tourism products and services, it is necessary to use thematic branding;
- complementarity: thematic and geographic branding complement each other, and a thematic brand can become a sub-brand of a geographic brand (for example, active mountain tourism can be associated with branding Kazakhstan as a geographic place);
- the reinforcing effect of geographic branding: thematic branding (gastronomic brand,

active tourism) must be supplemented by a geographic indication of the area.

1.2.5. Event Branding

Destinations can use various events (Universiade, Expo) to strengthen their brand. Brand should be emphasised as a destination's competitive identity. The goal of a destination brand is to provide tourists with a positive experience, impressions from the first stage, and start getting to know the materials. by destination until returning home (Anholt, 2010; World Tourism Organization, 2010). It is essential that the created brand, the picture of the goal, eventually coincides with what the tourist experienced when visiting. The destination branding strategy should be structured in such a way that the tourist can go through the following stages (World Tourism Organization, 2010):

- 1) ignorance;
- 2) awareness;
- 3) interest;
- 4) conviction;
- 5) purchase;
- 6) satisfaction;
- 7) advice to friends.

To summarise, it is essential to understand the evolution of the scientific approach to destination marketing and market development and customer behaviour.

2.1 Secondary data

Over the past three decades, we have witnessed globalization, the collapse of the USSR, crises, the emergence and development of the Internet, the wide dissemination of information, and the growth of competition between states for the attention of investors and tourists. All those events, in turn, led to a change in the business environment and markets in the tourism industry. Moreover, the scientific literature indicates that all these factors -

shifters and drifters - significantly affect the consumer behaviour of tourists, business functions and processes of tourism service providers and destinations.

The amount of published research, primarily devoted to managing and marketing tourist destinations, has been steadily growing over the past thirty years. In this chapter, we will review existing studies of destination marketing.

Marketing is a vast field of study; the same applies to destination marketing.

According to Kotler and Keller, "Marketing management is the analysis, planning, implementation and control of programs designed to bring about desired exchanges with target audiences for personal and mutual gain. It relies heavily on the adoption and coordination of product, price, promotion and place for achieving responses" (Kotler, P. (2007). Marketing management. Pearson Italia Spa). It largely depends on the acceptance and agreement of the product, price, promotion and place to get feedback." Thus, marketing management is the business process of managing marketing activities.

This chapter discusses the classification of research areas/specific areas based on the main components and activities, the role of marketing and promotion of the destination management organization (DMO), and the two ends of the tourism destination's supply chain/value creation.

2.1.1. Characteristics of Kazakhstan

Kazakhstan is located in the central part of the Eurasian continent, equidistant from the Atlantic and Pacific oceans. Kazakhstan is the ninth largest country globally, the area of the country is 2724.9 thousand km².

Kazakhstan borders Russia, China and other Central Asian countries, including Uzbekistan, Kyrgyzstan and Turkmenistan. A significant part of the border runs along the Caspian Sea. The country is rich in oil and minerals.

The nature of Kazakhstan is distinguished by landscape diversity:

- Deserts or semi-deserts are found in the southwest.
- Mountains are natural attractions of Central, Eastern and South-Eastern Kazakhstan.
- The north of the republic is located mainly in the steppe and forest-steppe zones.

There are about 48,000 lakes in Kazakhstan. The largest lakes are the Caspian Sea, the Aral Sea, Lakes Balkhash, Alakol, Zaisan, and Tengiz. There are over 7 thousand rivers in the country. The largest are Irtysh, Ishim, Oral, Syrdarya and Ili.

Flora and fauna of Kazakhstan are diverse: more than six thousand species of plants grow in the country, over 500 species of birds nest here; local rivers and lakes are home to 107 species of fish; 30,000 species of insects live in the steppe and forest-steppe zones. In the steppes of Kazakhstan, one can meet herds of goitered gazelles and wild kulans. The deserts are inhabited by giant lizards, snakes and rare species of spiders. Mountain peaks are a favourite habitat for the snow leopard. Kazakh steppes are also a home for such unique species as Ustyurt wild sheep, Turkestan lynx, Tien Shan brown bear, flamingos, and some species of swans.

As a rule, most large cities are located on the banks of large rivers. Among the largest cities of the country: Nur-Sultan, Almaty, Karaganda, Shymkent, Taraz, Pavlodar, Kokshetau, Kostanay, Petropavlovsk, Ust-Kamenogorsk, Semey, Uralsk, Kyzylorda; in total there are 86 cities and towns in Kazakhstan (Visitkazakhstan.kz, 2016).

2.1.2. Geographical landscape characteristics

The relief extends from west to east from the Caspian Sea to the Altai Mountains and from north to south from the plains of Western Siberia to the oases and deserts of Central Asia. At about 804,500 square kilometres, the Kazakh steppe occupies one-third of the country and is the immense dry steppe in the world, characterized by large pastures and sandy patches. There are significant topographic differences within Kazakhstan. The highest

point, Mount Khan Tengri, on the border with Kyrgyzstan in the Tien Shan Range, is 7010 meters. The lowest point of Karagie, in the Caspian lowland in the west, is 132 meters below sea level. Only 12.4 per cent of Kazakhstan is mountainous, mostly the Altai and Tien Shan ranges in the east and northeast, although the Ural Mountains extend south from Russia. Many Altai and Tien Shan peaks are covered with snow all year round. Their runoff is the source of the rivers and streams of Kazakhstan.

Essential rivers and lakes include the Aral Sea, the Ili River, the Irtys River, the Ishim River, the Ural River, Lake Balkhash and Lake Zaysan.



Figure 1. The map of Kazakhstan¹

On the map provided above are the most significant water sources and rivers: the Caspian Sea, Aral Sea, Lake Balkhash, Zaysan lake, Irtys river (Ertis), and Ishim river (Esil), Syr Darya river and Oral river.

¹ Source: <https://www.britannica.com/place/Kazakhstan>



Figure 2, Sunset on Balkhash Lake²

East and South-East regions of Kazakhstan are considered high mountains regions and include Altay, Saur Tarbagatai, Zhungar Tau, Tien Shan mountain, Khan Tengri peak, Belukha Mountain and Turgen Gorge (Visit Kazakhstan, n.d.).



Figure 3. Turgen Waterfalls in the Turgen Gorge region, South Kazakhstan³

² Source: <https://www.remotelands.com/destination/lake-balkhash>

³ Source: <https://explorekazakhstan.net/ru/>

The temperature in different regions and subregions of Kazakhstan varies significantly: freezing winters are followed by hot summers; thus, the climate in Kazakhstan is sharply continental.



Figure 4. Camels in Kazakh Steppe in Summer⁴

North and Northwest regions of Kazakhstan are low-mountain regions. Highest peaks are Aksorgan (1565 m), Karkaraly (1403 m), Chingiztau (1305 m), Ulytau (1133 m) (Visit Kazakhstan, n.d.). The northern mountain region is known for Burabay National park, with picturesque mountains and unique lakes.



Figure 5. Burabay National Park, Northern Kazakhstan⁵

⁴ Source: <https://aboutkazakhstan.com/blog/nature/breathtaking-views-of-kazakhstan-nature/>

⁵ Source: https://www.tripadvisor.com/Tourism-g2350742-Burabay_Akmola_Province-Vacations.html

2.1.3. Overview of the chosen regions

Due to the size of the country, we chose four regions to conduct the research: the city of Nur-Sultan and Burabay National Park. According to the statistical compendium "Tourism of Kazakhstan" (Bureau of National Statistics, 2021), these regions are one of the most popular touristic attractions in Kazakhstan.

2.1.3.1. City of Nur-Sultan

Since 1998, the capital of Kazakhstan has been Nur-Sultan, known as Astana, till 2018. Nur-Sultan is located in the centre of Kazakhstan in the dry steppe zone, a subzone of dry fescue-feather grass steppes. The territory of the city is a low floodplain terrace. The Yesil River is the primary water source of the city. The region's climate is sharply continental - cold and long winters and hot, moderately dry summers. Nur-Sultan has a convenient location in the Eurasian continent centre, making Nur-Sultan an economically advantageous transport, communication, and logistics centre.

In terms of tourist attractions, the new centre of Nur-Sultan, with wide avenues and unusual buildings, was built from scratch on the left bank of the Ishim River; and the right bank of the river, with its calm and cosy atmosphere, still keeps the memory of the Soviet past.

On the left bank, there are such world-famous sights of Nur-Sultan as:

Baiterek tower with an observation deck at the height of 97 meters. The building embodies the legend of the mythical tree of life and the magical bird Samruk.

Khan Shatyr, the largest hipped building in the world, is a mall with restaurants, entertainment and even an indoor beach.

Nur Alem Future Energy Museum in the form of a sphere, each floor of which demonstrates different sources of energy.

The other part of the city contrasts quite noticeably with the left bank: ancient buildings and sights of the 19th century and the Soviet period seem to take you back to the past;

however, there is a new area with the same unusual views and wide streets as on the left bank. The right bank is known for such attractions as:

The Saken Seifullin Museum (the oldest building in the city), the First Muslim School (today the bank building), the trading house of the merchant Matvey Kubrin (today the Astana shop), the house of the merchant Vasily Kubrin (state archive), the house of the merchant Moiseev (hospital), etc., which were built over 100 years ago.

Old Square on the right bank and Beibitshilik Avenue to touch Soviet history.

The snow-white Khazret Sultan Mosque, the largest mosque in Central Asia, or the Palace of Peace and Accord, is in the form of a sparkling pyramid. Also, the attention of tourists is attracted by the theatres "Astana Opera" and "Astana Ballet", the multi-genre repertoire of which is constantly enriched with masterpieces of world classics and modern productions (Kazakhstan.travel, n.d.).

2.1.3.2. Burabay National Park

There are 14 lakes with an area of more than one sq. km each and many smaller lakes. The largest and most famous lakes are Big and Small Chebachye, Shchuchye, Borovoe and Maybalyk. Borovoe has no monuments of material culture. However, the combination of magnificent mountains, blue lakes, pine and larch forests created a unique beauty of natural landscapes. Borovoe is beautiful at any time of the year. In winter, the entire pine forest is covered with much snow. Skiing, snowmobiling, sledging, winter fishing and magnificent views are at the service of tourists. In spring, the forests are full of spice herbs and floral scents. The level of Borovoy shore is 250 meters. The highest mountain Kokshe (Sinyukha), is located at an altitude of 997 meters above sea level. The forest area of Borovoye is full of wild animals and about 300 species; the flora also represents a wide variety of plants (Visit Kazakhstan, n.d.).

2.1.4. Nation branding: key milestones and problems

In this section of the work, we will try to consider the most effective methods and understand the critical success factors for destination marketing.

2.1.4.1. The connection between country brand, tourism, and economy

The sale of goods and services is one of the ultimate goals of marketing, in our case, tourism. The tourism industry, in turn, creates new jobs creates sources of income for local companies and households. Furthermore, they, in turn, through various deductions and tax payments, contribute to the development of the local economy.

International experience shows that tourism can have significant positive direct and indirect impacts at the local level, creating production and employment and rising wages and capital gains (Archer and Fletcher 1996, Frechtling and Horvath 1999).

However, tourism can have different distributional effects depending on the forward and backward links of tourism activities with the rest of the economy, the characteristics of the labour market, or how government transfers and taxes affect, among other things, households and firms. Moreover, evidence from developing countries confirms that tourism expansion may not be in the interest of the poor (Blake, 2008, Blake et al., 2008, Wattanakuljarus and Coxhead, 2008).

First, tourism consumption can be redistributive, as it primarily employs less skilled wage earners, who usually belong to poorer households. However, depending on the degree of tourism specialization of the region, the number of self-employed in hotel and restaurant services can be relatively high. Second, tourism consumption can be redistributive because it means more government revenue. However, this will depend on the tax rate on tourism products and the government's spending on these new revenues. Moreover, tourism consumption could negatively impact income redistribution. The price increase mainly affects food and beverages, real estate services and commodities, which are staples for

the poorest households, accommodation services and cultural and entertainment services. Services. It was consumed mainly by wealthy households. These beneficial effects may affect people and factors outside the region (Archer, 1982). This leakage will depend on the economy's structure (the number of imports required in the manufacturing process) and on the type of products consumed by the visitors. Moreover, to consider distributional effects, it is necessary to consider how tourism consumption affects the distribution of income from labour and capital among different socio-economic agents.

2.1.5. Elements of a successful destination marketing strategies

Success factors explain why destination marketing practices succeed or fail and reflect the location's ability to consider when developing an effective location marketing strategy (Rainisto, 2003).

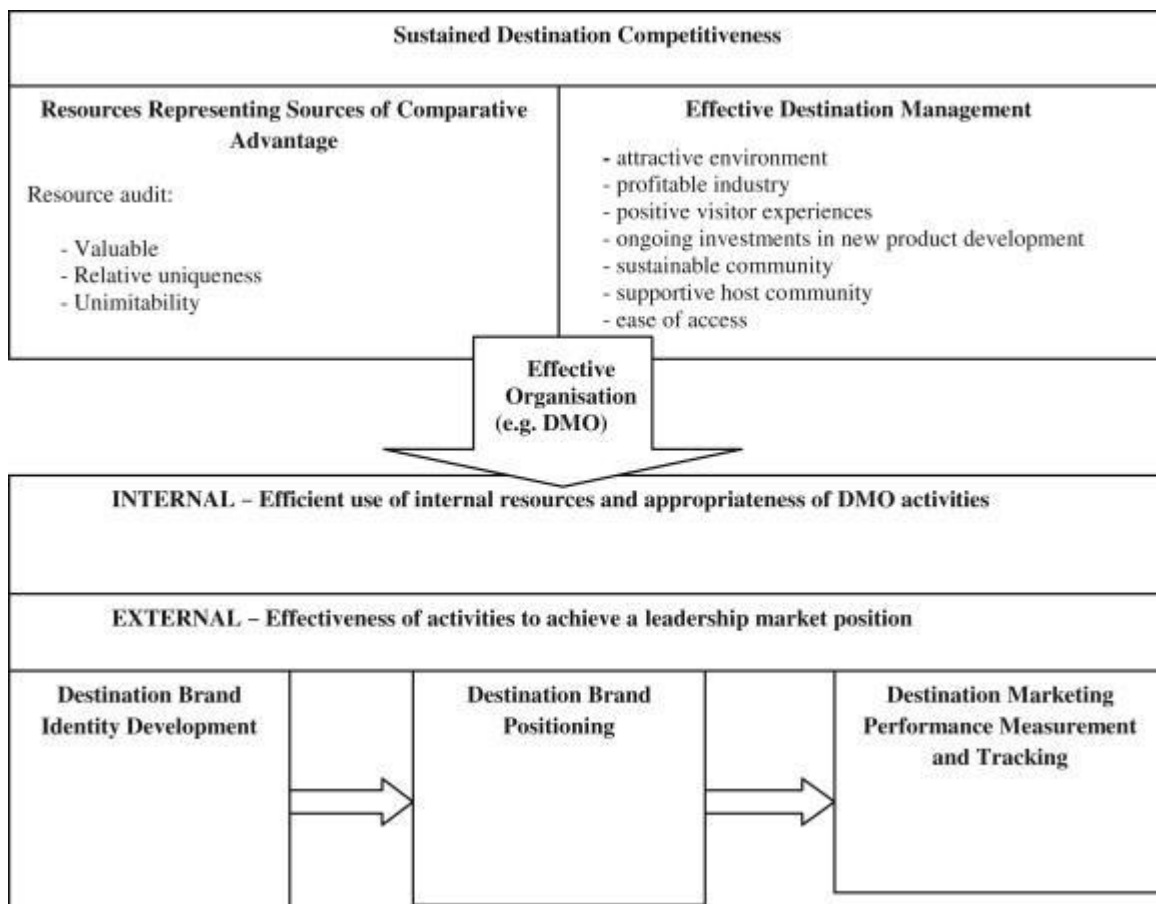


Table 4. Destination marketing framework

Based on a suggestion by Morgan and Pritchard (2004) (Table 4), these factors into four stages of destination brand formation, called: strategic orientation; the identity and image of the destination; stakeholder participation; and implementation, monitoring and review.

Strategic orientation

According to Morgan and Pritchard (2004), the first step in destination branding is market research, analysis, and policy recommendations. This suggests that essential elements are related to situation analysis factors, goals and objectives, and strategy.

According to Johnson and Scholes (2002), strategy is "the direction and scope of an organisation in the long term". Thus, adopting a strategic orientation implies applying a long-term and holistic approach to tourism planning.

In addition, Buhalis (2000) notes that the strategic marketing objectives of destinations are to:

- Improve the long-term well-being of the local population,
- Delight visitors by maximising their satisfaction,
- Maximise the profitability of local enterprises and maximise the multiplier effect,
- Optimise the impact of tourism by ensuring a sustainable balance between economic benefits and socio-cultural and environmental costs.

In addition, successful branding requires investments in brand buildings and infrastructure sufficient to make the promised brand experience a reality (Hankinson, 2003). Several authors, such as Curtis (2001), Deffner and Metaxas (2005) and Pride (2002), have identified the need for a long-term orientation in destination branding. Similarly, Ritchie and Ritchie (2002) highlight the need for a more holistic strategic approach to destination marketing to achieve a sustainable competitive advantage instead of a promotion-focused approach, while Rainisto (2004) highlights the importance of alternative strategies for future uncertainty.

Thus, providing appropriate benefits to all stakeholders, long-term vision, and the negative impact of tourism beyond visits are indicators of strategic orientation.

2.1.5.1. Destination identity and image

The development of identity, image, and visual communication constitute the second and third phases of building a destination brand. Place identity is how a place wants to be perceived and is a unique set of brand characteristics that destination marketers want to create or sustain that distinguish it from other places (Rainisto, 2003). Image, however, is the sum of the beliefs, ideas, and impressions people have about a place and must be valid, believable, distinctive, and attractive (Kotler et al., 1999).

Therefore, as Pike (2004) and Keller (2003) point out, the brand represents the producer's identity and the image for the consumer, and the brand positions the interface between them. Similarly, Rainisto (2003) adds that marketing communications can be used to bridge the identity and image of a place.

2.1.5.2. Stakeholder involvement

As discussed in the literature review, meeting the goals and needs of a destination's various stakeholders is one of the main requirements for successful destination branding. Indeed, many authors argue that these various stakeholder groups need to be involved in the process. Stakeholder involvement includes all individuals, organisations and groups affected by tourism development who play a role in determining the nature of the development direction (Simpson, 2001). Simpson adds that the identity of the stakeholders and the scope of participation are two elements of this definition. In addition, issues of leadership and stakeholders or public-private partnerships are pervasive in the current literature on destination branding.

2.1.5.3. Brand implementation, monitoring and review

Implementation, monitoring, and review constitute the last two phases of building a destination brand (Morgan & Pritchard, 2004). Simpson (2001) notes that it is often at these end stages that many strategic planning processes fail. Therefore, adequate planning must include implementation, monitoring, and review to recognise this. According to Simpson (2001), such elements include goal prioritisation, allocation of responsibility for critical tasks, cost estimation, the inclusion of a review mechanism, and methods of resource allocation. In addition, Pride (2002) notes that determining brand performance requires constant evaluation, monitoring, and adjustment of what is being done. Similarly, Metaxas (2003) in Deffner and Metaxas (2005) argues that a performance feedback procedure is required for effective destination marketing.

2.1.6. Effective destination management

Ritchie and Crouch (2003) used comparative and competitive advantage concepts to identify if destination stars are made or born. Suggesting the example of Russia, which is full of natural resources but lacks effective use of the latter, led to poor level of the touristic industry.

Though there has not yet been developed a unified destination effectiveness model, some factors affecting it can be named:

- Attractive environment
- Profitable industry
- Positive visitors' experience
- Ongoing investment in new product development
- A sustainable community
- Supportive host community
- Ease of access
- Effective organisation

2.1.6.1. Destination marketing organisational effectiveness: external and internal

The organisational effectiveness of destination marketing is divided into internal and external. The internal is responsible for the efficient use of internal resources, the achievement of goals and the expediency of actions.

When reviewing the literature, the researchers pay attention to the fact that more attention is paid to analysing the external effectiveness of DMO marketing activities. There has been less focus on internal organisational effectiveness, probably because scientists often find it difficult to access the inner sanctuary of DMO decision making (Volgger & Pechlanner, 2014). However, the authors readily admit to being consultants and employees of such organisations. It is difficult for many DMOs to create meaningful KPIs due to the nature of the "open" system they operate, where tourist arrivals are not directly controlled or dependent on marketing expenses. However, this does not interfere with the oft-cited ROI metrics expressed as marketing spend relative to attracted visitors.

Not surprisingly, few studies have been published examining the relationship between management, organisation, strategy, and DMO goal achievement to help destination marketers define an effective organisation (O'Neill, 1998, Pike, 2004).

Twenty years ago, it was argued that little had been published about the structure of National Tourism Offices (NTO) (Choy, 1993; Morrison et al., 1995) and that there was no generally accepted model for the structure of DMO. This is evidenced by the wide variety of existing DMOs, such as authorities, commissions, councils, tourism organisations, bureaus, tourism offices, corporations, departments, councils, ministries, and the emergence of QUANGOs (quasi-government bodies) (Morrison et al., 1995, p. 606). While there are still many different DMO legal entities, over the past 40 years, there has been a general shift away from DMOs as government departments and RTOs as private sector advertising cooperatives toward public-private partnerships (PPPs), which primarily involve

public funding and board members from the private sector (Pike, 2008a) and the QUANGO model, in which they are publicly funded but not directly managed as part of the government. The governance of such entities is a critical issue as governments and their taxpayers must ensure that public funds are appropriately managed. Tourism stakeholders strive for transparency and altruism in board decisions.

The nature of PPP entities means that politics is a significant factor in DMO decision making (d'Hautesserre, 2011, Ryan and Silvano, 2010, Ryan and Zahra, 2004). The tourism sector includes a wide range of organisations and individuals with different levels of influence and is involved in a complex set of relationships. However, the topic of tourism policy in the academic literature has been rare (see Hall, 1998; Hollingshead, 2001, Kerr and Wood, 2000), and there have been calls for more excellent coverage of policy studies in higher tourism education (see Dredge, 2001, Fayos-Solá, 2002, Hollingshead, 2001). Perhaps the seminal study here is Kerr (2004), which produced an in-depth analysis of the "management of strategic failure" in Scottish tourism and an insightful theoretical and empirical analysis of tourism policy in one country where DMO has been criticised in detail. Politics has been described as "the pursuit of power, and power is who gets what, when and how in the political and administrative system and tourism" (Elliott, 1997, p. 10). The political environment of the destination includes ruling and opposition politicians, government funding agencies and other departments, bureaucratic culture, competitive entrepreneurs and special interest groups, the media, and local communities.

It has been argued that branding tourism destinations are much more complex than branding consumer goods (Pike, 2005) for five main reasons. First, success is most likely when the range of differentiated features emphasised is limited to one or more features or benefits (Aaker & Shansby, 1982; Crompton et al., 1992), and yet the destination usually includes a diverse and eclectic set of features, which must somehow be reduced to a

sentence of seven words. Second, the market interests of diverse and eclectic stakeholders are heterogeneous. Third, DMO's decision policy can make the best theories inapplicable in practice. Fourth, destination marketers have no control over the actual implementation of the brand promise. Finally, the ultimate goal of branding is to drive brand loyalty, and yet DMOs rarely make contact with visitors to provide meaningful post-visit interaction to encourage repeat visits. This section of the review follows the structure of the branding process (see Aaker, 1991), which includes three key elements: brand identity, that is, the image that the brand strives for in the marketplace; brand image, which is the actual brand image of consumers; and brand positioning, which is the marketing communication's attempt to achieve a match between brand identity and brand image.

2.1.7. Destination branding approaches

Promoting the unique characteristics of a destination to potential visitors is an essential element in the functioning of the tourism market. Anholt (2010) defines a *destination brand* as a competitive place identity.

A destination brand aims to create a unique and desirable image communicated to the visitor. The task of the brand is to enable the tourist to choose an individual trajectory of the tourist route, corresponding to his ideas about tourism, recreation, and travel. Like any other brand, a destination brand has two crucial functions: identification and differentiation (Aaker, 1991). In the marketing literature, brand content is called brand identity since one of the main functions of a brand is identifying a product or service, a destination. The synonyms of the term identification are recognition concepts and recognition since identification is the process of comparing a perceived object with a standard stored in memory and establishing its identity (Domnin, 2009). Thus, *destination branding* can be defined as communicating with consumers based on the unique identity of a destination

and its differentiation from competitors (Morrison & Anderson, 2002 as cited in Marzano, G., & Scott, N. 2006).

It is important to note that identification (or, in other words, a brand identity system) is different from a destination's "image". Instead, the brand's characteristic features reflect how brand developers would like it to be perceived by key stakeholders and the consumer. A brand image is how consumers perceive and evaluate a brand (Domnin, 2009). Thus, according to the developers, image is how the brand is perceived, and identity is how it should be perceived by the target audience (Keller, 1993).

If the image and identity coincide, such an area has good tourism potential since visitors will encounter approximately the expected service. The case where the perceptions of the territory were worse than the experience gained is also positive, as it contributes to the growth of the popularity of the territory and the levelling of the gap between image and identity. However, when the ideas about the territory are better than the experience gained, the tourist will probably never revisit this territory and will also begin to spread his negative opinion about it among other people (Lazarev, 2013).

Research emphasizes that residents support the brand of the territory, as they are brand bearers and must accept and develop it (Zenker, Beckmann, 2013; Braun et al., 2013). Since the brand cannot exist in isolation from the product (and in the case of territorial branding, residents, services, organizations and goods of the territory become the bearers of the brand), if the brand of the territory is not accepted, it can quickly be forgotten" (Lazarev, 2013).

Today, there are many general models for brand identity development (Domnin, 2009) and destination branding (Barnes, Mattsson & Sørensen, 2014). In the case of developing a destination brand, the need for a territory to act as a single brand of various tangible and intangible assets leads to inevitable generalizations in defining its identity from the supply

side. For example, a place includes tangible attributes, such as historical monuments or beaches, and intangible characteristics, such as the culture of the people and their customs and traditions. In this regard, the most common brand-building models are 1) House of Brands; 2) Endorsed Brands; 3) Master/Sub-brands Relationship; 4) Branded House (Datzira-Masip & Poluzzi, 2014).

In developing a brand, it is necessary to take into account how the audience will perceive it. We emphasize that the definition of the target market is essential because some aspects of the influence may be positive in one segment and be ineffective for other groups (Fan, 2006). In addition to its identification function, the purpose of a destination brand is to distinguish it from competitors to the consumer (Qu, Kim & Im, 2011). As a function of the brand, differentiation conveys to the consumer significant differences or uniqueness of the destination. In general, all destinations emphasize high-quality services in tourism and hospitality, restaurants, and public space design in brand building (Baker, 2007). In this regard, brand developers need to understand which associations for the consumer have an advantage over other destinations. Concrete facts in differentiating associations help consumers appreciate and maintain brand loyalty (Keller, 2001).

The approach associated with brand identity formation (building a brand from the supply side) and its image (consumer perception) also determine the range of modern research in territory branding. Much area branding research has been on the role of destination management organizations (Presenza, A., Sheehan, L., & Ritchie, J. B. (2005). The formation of particular public organizations responsible for developing the brand of territories and conducting research on tourist groups reflects the need for systematic work to study the distinctive features of territories and create brands based on the target audience (Hanna & Rowley, 2015).

There is an increasing opportunity to use the stakeholder model to build effective brand models and align stakeholder interests (García, Gómez & Molina, 2014).

2.1.8. State of brand Kazakhstan

According to the Committee of the Tourism Industry of the Ministry of Culture and Sports of the Republic of Kazakhstan, to implement practical measures for effective marketing and promotion of the image of Kazakhstan in the domestic and international markets, the National Company Kazakh Tourism Joint Stock Company was established in 2017. Today, Kazakh Tourism acts as the brand manager of the country, implementing most of the activities to promote the national tourism product.

In recent years, Kazakhstan has been increasingly noted in various international tourism ratings as one of the best places for recreation, especially as a destination for ecotourism.

For example, only this year, Kazakhstan is a place to visit according to such authoritative world publications as Lonely Planet, Le Figaro (France), and The Guardian (Great Britain).

In similar tops, Kazakstan was marked a year earlier. At the beginning of 2020, the British Society of Backpackers identified Kazakhstan in the TOP-5 must-visit list for 2020 for lovers of active eco-travelling; Lake Kaiyndy was included in the list of the most beautiful mountain lakes in the world according to RIA. According to the authoritative edition of Gulf News, Big Almaty the lake entered the TOP-5 destinations for residents of the United Arab Emirates.

According to the British consulting company Brand Finance (Kursiv.media, 2020), despite all the problems associated with the coronavirus and the stagnation of the economy around the world in 2020, Kazakhstan retained its position on the same level as in 2019. It was one of the fastest-growing national brands. In the top 100, the country took 44-th place, seven positions higher than in 2018.

2.1.9. Expert's public opinion overview on Kazakhstan positioning

2.1.9.1. Business people's opinion

A vital role in developing the country's brand is played not only by the government but also by the country's inhabitants, particularly entrepreneurs involved in attracting investments from abroad.

According to Eldar Abdrazakov, entrepreneur (Forbes, 2018), to introduce business people from different countries members of the Young President Organization (YPO) to Kazakhstan, in 2017, Kazakhstani YPO participants applied to hold a regional YPO conference in Nur-Sultan. To stand out among the participants, we chose the name: "The New Silk Road". As Abdrazakov noted, foreigners associate the Silk Road more with Uzbekistan.

Businessman Armanzhan Baitasov (365info.kz, 2018) clearly defined the image of Kazakhstan in the eyes of foreign companies: "an excellent field for quick earnings." Foreigners understand that the country is on the oil needle and characterised by corruption.

According to Mikhail Lomtadze, CEO of Kaspi.kz, (Forbes, 2019), the success of Kazakh companies in the international arena increases the investment attractiveness of Kazakhstan.

2.1.9.2. PR and branding specialists' opinions

The President of the Kazakhstan Press Club, Asel Karaulova (365info.kz, 2018), notes that many competitions on the brand development of Kazakhstan were held in Kazakhstan, but all work is carried out unsystematically. Huge budgets are allocated for the promotion of Kazakhstan, but there is no single systematic work.

Different people perceive Kazakhstan differently. While good work has been done regarding investors, they associate Kazakhstan with oil and investment opportunities (Kiseleva, T. (2018).

According to Asel Kozhakova (2022), head of the RedPoint Kazakhstan communications agency, the state agenda mustn't differ from the business plan; the integration of all communications is essential. If we talk about the nomads' cultural code, the Kazakhs' code, it should be broadcast equally to all stakeholders (state, media, business). But for now, it's scattered. For 30 years, the brand of the country has not been built (Forbes, 2022).

If we take the world experience, countries make their positioning differently. For example, in South Korea is, plastic surgery and cosmetics. First, it is necessary to understand what kind of "product" Kazakhstan sells outside. What is Kazakhstan? Is it a country of the Great Steppe, attracting innovations, a land of traditions and culture, or hospitality? When the product is formed, it is already possible to engage in its promotion and image. It is necessary to develop a shared understanding: Kazakhstan - is it about what? And everyone must agree with this product; then, everything will move harmoniously. Each of the market players and each Kazakhstani will broadcast this plan to their target audience, and a single picture will emerge, and it will assemble the puzzle.

2.1.9.3. Kazakhstan's place in international rankings

In this section, an overview of various global ratings that assess the attractiveness and value of country brands, particularly Kazakhstan, is given.

According to Brand Finance's annual survey, the value of the world's 100 most valuable country brands has plummeted due to the COVID-19 pandemic, down \$13.1 trillion.

According to Forbes (2015), Kazakhstan has become the only country in Central Asia included in the top 50 most expensive brands. Brand "Kazakhstan" was estimated at 175

billion dollars, increased in price by 6% over the year, compared to 2014 - 164 billion dollars.

The assessment includes various indicators, including GDP, investment and tourist attractiveness, policy and trade rules, and social aspects. According to Brand Finance (2021), at the end of 2021, Kazakhstan moved from 44th to 51st place. Such transition indicates a decrease in the attractiveness of Kazakhstan, both for tourists and investors, and suggests the surrender of the country's brand.

In the Future Brand Country Index (2020) ranking, Kazakhstan ranks 49th.

3.1 Methodology

The main research objective is to analyse how territories are branded in the case of Kazakhstan.

Research questions:

1. How are destinations promoted in Kazakhstan?
2. Is there a unified marketing positioning strategy in Kazakhstan?

To answer these research questions, the following assumptions on the characteristics of destination marketing strategies in Kazakhstan were made based on the own experience of the research author:

- Regions of Kazakhstan are promoted differently;
- Methods of promoting destinations in Kazakhstan have poor infrastructural and service basis;
- State and private destination marketing positioning strategies are not aligned;
- Existing external media relationships are not well-developed.

3.1.1. Method and Techniques

A qualitative research methodology was chosen to achieve the study's goal and answer research questions.

In-depth interviews with experts in destination marketing, country branding and incoming tourism and semi-structured observations were chosen as the methods of data collection. To conduct semi-structured observations, an observational checklist was prepared. Also, to compile a complete picture, six interviews with foreign tourists were conducted. However, since the interviews were conducted out of season and due to covid restrictions, the researcher was limited in the search for respondents.

3.1.2. Research process

To obtain objective data, the researcher conducted interviews with international experts in destination marketing and branding.

The following industry experts took part in the interview:

- Andrey Purtov, marketing, strategy and education expert with over 25 years of experience. Curator at the British School of Design, Dean at MACS, Lecturer at Moscow State University, Director of the British Higher School of Design.
- Sergey Stanovkin, program director of the European News Academy, commercial director for the Eurasian region of the BBC television company. Expert in national and corporate branding, strategic communications, PR, GR, and IR.
- Akbota Valkenburg, director of LTD Rubythroat Birding Tours. The company has been organizing eco-tours in Kazakhstan for 15 years, particularly bird watching tours.

Observations were conducted in two different touristic locations in Kazakhstan during weekdays and holidays. Locations for observations were: the capital of Kazakhstan, Nur-Sultan and Burabay resort. These observations were done during an organised touristic trip and during not organised walking tour and lasted from two to three hours.

In addition, there were six in-person interviews with foreign tourists.

IV. Research findings and Analysis

4.1 Interview results

The author highlighted the most insightful information from the in-depth interview with industry experts based on the interview results.

When developing, it is essential to understand that the brand is created for years to come, it is not what it was but what the country wants to be.

If we talk about the theory of the national brand, then we can distinguish two components: status things and experience. Status things include values, business environment, and relationships. Experience is something with which a person can interact: goods, tourism, cultural heritage, exports. Through experience, people do not necessarily have to travel to a country, but through a country's cultural heritage or its products, they will have an idea of that country. For this, it is essential to develop corporate brands.

When using placement in the media, it is crucial to consider both the target audience of the selected channel and the reputation of the channel. Because the reputation of the selected channel, one way or another, is superimposed on one's reputation when placing ads on their channel.

For each project and activity in the marketing campaign, performance (the degree of influence on the achievement of goals) and efficiency should be measured - the ratio of the result achieved to the total resource intensity of the solution. To evaluate the effectiveness, we need to measure the target metrics we are interested in before and after the marketing campaign. To evaluate the effectiveness, measure how much the increase in target marketing metrics costs. Several activities will likely work to achieve the goal - then their effectiveness and efficiency can be compared with each other, changing the campaign in the course of its implementation by redistributing the budget in favour of better-performing solutions.

During the interview, the topic of product placement in films and placement in the media was also covered.

One expert noted the increased interest in New Zealand after the Lord of the Rings movie. In Russia, the rapid interest in Baikal on the part of tourists from China was primarily due to the song of a famous Chinese singer who, having visited Baikal, sang that he "Met his love, as beautiful and pure as the water of Baikal." Citing these examples, the expert noted that he does not believe in the territorial placement product but believes in the effectiveness of genuine reviews about the territory on social media.

Speaking about the promotion of Kazakhstan as a film set for cinema, the expert noted the need to create an infrastructure for foreign directors to travel comfortably and safely to film in Kazakhstan. It is necessary to create a predictable environment and transparent decision-making tools and make it possible to obtain permits for entry and filming online. When investing in filming a movie in Kazakhstan, directors and film companies must be sure that their investments are protected and that no one will violate contractual obligations.

Sergey Stanovkin also noted the importance of creating convenient routes for visiting tourists. Not only to Kazakhstan but also within Kazakhstan. It is necessary to think over comfortable logistics from large cities to the regions.

Significant image events such as Expo, Universiade and various forums are periodically held in Kazakhstan. During this, it is crucial to clearly define the event's target audience and build all communications accordingly. At the same time, the experts agreed that they do not form the brand of the territory but only work for awareness of it.

According to one of the experts, many small but sincere events, activities and projects can do more for the country than giant mega-projects initiated at the state level. Because people do not trust the official media and officials more, but people like themselves -

students, tourists, and investors. Furthermore, ultimately, people go to people.

The experts also noted that it is important to work with the population itself, to convey the importance of good service and attentive attitude to tourists, to explain the importance of tourism for the development of the economy and the country.

Akbota Valkenburg also noted the low level of culture and quality of service in guest houses and tourist areas. It is also worth noting the importance of following global trends. For example, according to Akbota, among visiting tourists, there are a large number of vegetarians who come to Kazakhstan and face the problem of choosing the right food.

Both experts and tourists, during the interview, noted the indifferent attitude on the part of service personnel, representatives of state bodies and authorities. Therefore, it is important to carry out widespread work to explain the importance of inbound tourism and increase the general level of culture among the population.

In many ways, Kazakhstan was chosen by lovers of ecotourism and fans of nomadic culture.

Before coming to Kazakhstan, Tourists noted that they imagined it as a more backward state but were pleasantly surprised when they saw the country. Some were well acquainted with the country and had realistic ideas. Speaking of associations, tourists noted oil, corruption scandals, and nomadic culture. In preparation for the trip, difficulties arose when planning trips within the country by road or rail. However, the interviewed tourists did not experience any difficulties with a visa since Kazakhstan introduced a visa-free regime for residents of the European Union and the United States. Answering the question "What places in Kazakhstan are on your to-visit list?" all tourists planned to visit Almaty. During the trip, the majority experienced positive feelings; the only thing is that everyone noted the lack of sanitary facilities and sewerage on the roads and in remote villages. As for the expenditure side, many noted the relative cheapness, but tourists also faced fraud from

service personnel and cabbies when they tried to take more money from them than expected.

5.1 Summary of observations

5.1.1. Observations in Nur-Sultan

In the city of Nur-Sultan there is access to almost all external transportation means except for water, water connections via Ishim river can not be considered as it's not used for transportation. When it comes to internal transportation system, internal communications include busses and private taxi services. Tickets are available for purchase both online and onsite, while taxi services mostly operate through online applications accessible for people with smartphones. Overall there's enough parking spaces but most of them should be paid additionally. When evaluating open spaces and routes for pedestrians it was noticed that not in all parts of the city there are good pedestrian routes. Only few main roads have special bike passes which makes traffic on the streets more dangerous.

Quality of life in the capital can be called high, at least in the central parts of the city. Due to the fact that Nur-Sultan is relatively young capital, there is not much of historical and cultural heritage within the city: mostly museums and cultural centres.

Level of healthcare accessibility is high as there are both private and state medical centres available for everyone as well as emergency line and on site medical cabinets. However not all of them have staff that can provide services in English or any other foreign languages.

The capital can definitely be called secure city, most of the central areas are regularly patrolled by city police or guarded by private security services.

5.1.2. Observations at Burabay National Park

There are several ways to get to Burabay National Park: by private car or taxi on a paid road or by different types of trains. Getting to the National Park by train is the cheapest, but

it gets you to the train station from where you need to get a taxi, bus or carpool to the hotel or to the sightseeing. Overall transport is accessible but for state busses schedule is not very stable and taxi rates sometimes can be overrated. It can definitely be stated that traveling in Burabay National Park requires tourists getting a car, as travelling distances are high. In the area of Burabay National Park there are several lakes, water transport is available but is mostly used as touristic attraction, not to get from one place to another.

Quality of life in the area is relatively low, compared to the capital and big cities due to weaker economy. Overall local citizens in the surrounding cities are dependent on the touristic industry as they either own some hotels, restaurants and other facilities or provide services for bigger companies.

V. Concluding remarks

Overall, methods of promoting destination marketing in Kazakhstan have a medium level of infrastructural basis and a medium level of services. It should be mentioned that infrastructure and services were assessed mainly at the touristic locations. The level of services was identified as high; however, there were services of English-speaking workers not at all places.

It was confirmed that state and destination marketing strategies are not aligned. Moreover, state strategies in different regions are not coordinated. When it comes to private destination marketing strategies - these mainly focus on attracting tourists to exact places like hotels, resorts and restaurants instead of calling clients to visit the whole region or country.

Existing external media relationships are not well-developed and usually work on a short-term basis. The interviewees noticed that they had trouble finding reliable travel advice and information on travel regulations, requirements, etc. Information needed mainly was obtained from travel blogs and private companies.

Based on the work carried out, the following recommendations can be made:

First, when working on the development of the brand of Kazakhstan, it is necessary to age out a long-term strategy and conduct systematic work on its implementation. Also, when building a strategy, it is necessary to define target audiences based on their consumer behaviour and select communication channels and relevant key messages. To increase the interest among the population in the development of inbound tourism, it is necessary to shift the focus from Kazakhstan as an oil country to a country that makes money on tourism.

Some factors were limiting the research: due to the size of the country researcher was unable to study all the regions, and only two main touristic places were chosen; it was impossible to get enough participants for a quantitative study and thus, a qualitative approach was applied; there was no access to both state and private documentation and strategic plans on destination marketing of Kazakhstan, that is why it was unfeasible to find out if strategies were poorly planned or not well realised. The findings and conclusions apply only to the current timeline studied regions.

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Appendix A Interview Scenario

The interview started with the question: “Why did you choose Kazakhstan as your travel destination?” to understand what factors influenced a person’s decision to visit Kazakhstan and whether the person had some preliminary knowledge before coming to the country.

“What were your associations with Kazakhstan before your trip” – I was asked to see what country is usually associated with.

“How did you prepare for the journey?” was asked to understand if there is enough available information for planning and organising a trip to Kazakhstan.

The question “Was it hard to get to Kazakhstan? Visa, transport, expenses” helped identify foreign tourists’ problems and obstacles while preparing for their journey.

Asking “What places in Kazakhstan are on your to-visit list?” helped identify the most well-known touristic destinations and why they are better known than other places.

“How do you feel travelling in Kazakhstan?” was questioned to understand what emotions, reactions, and feelings were evoked during the trip and whether these were primarily positive and negative.

The question “What difficulties do you have while travelling?” was brought up to determine if some infrastructural problems affect the country’s brand image.

“What can you tell about travel expenses?” helped reveal if demanded prices and quality of services were aligned.

“What did you miss during your journey?” - this question was needed to find out what in the services or brand strategy could be improved.

The final question helped identify whether the actual journey to Kazakhstan promotes the destination marketing strategy of the country “Would you like to come back to Kazakhstan?”

Additional questions to the interview participants:

- What sources did you use while planning your trip?
- Have anyone assisted you with your trip?
- Was it hard for you to prepare for a trip and travel as you didn't know the local languages?
- Did you get any help from local people?
- What unexpected problems did you have while travelling?
- Do you think that the quality of services and prices are aligned in Kazakhstan?

Appendix B Observational checklist for destination marketing elements and overall country attractiveness

Consumer relationships	Description	Primary service relationships	Description
Non-conflicting target markets		Retailers	
Residents and employees		Events and leisure activities	
Internal customers		Hotels	
Managed relations from the top		Other services	

Brand infrastructure relationships	description	Media relationships	description
Access services: external transport (air, sea, land, rail)		Publicity	
Access services: internal transport		Public Relations	

Hygiene facilities: car parks, open spaces		Advertising	
brandscape		Social Media	

Economic dominance & country appeal	description
Quality of life	
Historical and cultural heritage	
Accessible healthcare	
Stability and security	