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# Exploring local stakeholders' views on the prospects of China's Belt & Road Initiative on tourism development in Kazakhstan

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## ABSTRACT

This exploratory study examines the attitudes of tourism, civic and business stakeholders in Kazakhstan to China's proposed Belt and Road Initiative (BRI). It aims to determine the applicability of Social Exchange Theory (SET) in measuring local attitudes towards the likely impacts of the multi-sectoral, transboundary mega projects of the BRI on tourism development in the destination. In addressing this gap in research on attitudes to tourism development in this wider regional context, the study confirms the utility of SET as an explanatory framework in benchmarking stakeholders' attitudes towards the implications of the BRI for tourism development. The findings suggest that while there is a strong support for the economic value of China's BRI for the sector, there are some concerns that it may undermine local autonomy and Kazakhstan's distinctive brand as a tourist destination.

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Social Exchange Theory; Silk Road; Belt and Road Initiative; Kazakhstan; tourism development

## Introduction

China's re-imagination of the ancient Silk Road positions it as more than just a transit route linking the East to West, but as an overarching, regional economic development plan, with the promise of beneficial outcomes for participating countries (Huang, 2016). The New Silk Road, or the One Belt, One Road, which has been subsequently re-named the Belt and Road Initiative (BRI), proposes an ambitious strategy to connect 'trans-border infrastructure and mega transportation projects' across land and sea (Laruelle, 2018, p. 1). The scale of the BRI seems staggering with projects that span some sixty countries, three-fourths of the world's population, 40% of global GDP and over 38% of the world's land mass (Amighini, 2017, p. 24; Pencea, 2017, p. 114).

While China's motivation for the BRI is not directly to develop tourism, there is no doubt that the industry will be impacted as a consequence of its significant proposed infrastructural development (Koh & Kwok, 2017). As a multi-sectoral programme, the BRI involves the construction of roads, rail networks as well as the modernization of energy, water and electric and power infrastructure across Central Asian countries. These brick and mortar development projects provide vital amenities conducive to attracting tourism investment and as such are catalysts for the growth of the sector (BMI Research, 2016). But alongside the construction, transportation and energy sectors, the BRI also specifically targets the tourism industry as integral to the overall objectives for regional socio-economic integration and development (Aries, 2017; Laruelle, 2018). According to Liu and Dunford (2016, p. 335), tourism is a key service sector representing symbolic projects to 'increase support and

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capacity for the BRI' with the aim to deepen cooperation between government and the business sectors across participating countries.

### ***Kazakhstan's tourism performance***

Positioned as the geographical 'pivot' of the historic Silk Road (Sternberg, Ahearn, & McConnell, 2017, p. 3), Kazakhstan was chosen for this study as it is central to the success of China's Belt and Road Initiative (BRI). The country boasts relatively higher levels of economic performance in comparison to other Central Asian countries along the Silk Road, and a higher per capita income than China. As the 'largest landlocked country in the world', Kazakhstan is poised as a major beneficiary of the BRI's construction of trade routes connecting roads, rails and ports between China and Europe (BMI Research, 2016, p. 52). With the emergence of tourism as a crucial sector to diversify the country's reliance on energy, Kazakhstan's tourism development plan sets out ambitious goals of accelerated growth and modernization to increase the contribution of the industry to the country's Gross Domestic Product (GDP) from one percent to eight percent by 2025 (Murzamadiyeva, 2017).

With the staging of the World Expo in 2017, the number of international tourist arrivals to Kazakhstan peaked to 4, 559,500 in that year contributing US\$ 3077.5 million or 1.6 percent of the country's GDP. Tourism supports 150,585 jobs, or 1.7 percent of the country's employment. The government's focused investment in infrastructure and the designation of six tourism clusters for development indicate that the destination may continue to record positive performance on the Tourism Competitiveness Index, having moved four places to 81st position in 2017, from a position of 85th in 2015 (World Economic Forum, 2017, p. 202).

Kazakhstan mainly attracts international tourists from Europe, with the United Kingdom as the premier generating market from the region, accounting for 10% of all overseas arrivals. Most European tourists are independent travellers who visit the country for culture and ecotourism, horse driving and steppe safari. Asian tourists tend to book visits through tour operators, and mainly engage in activities such as city sightseeing, shopping and gambling. International tourists to Kazakhstan usually visit as part of a multi-destination trip to Central Asia that also includes Uzbekistan, and Tajikistan (Economic Times, 2014).

According to Laruelle (2018), Kazakhstan's topography of vast mountainous areas and deserts and steppes, along with low population density, make it both extremely costly and technically demanding to build infrastructure. The potential growth of both regional tourism from the outbound Chinese market, as well as international tourism, therefore support the economic rationale for massive capital expenditure spending on BRI infrastructure projects. Moreover there is also the prospect of the tourism sector contributing to human development through employment, as well as improvements to local social and civic amenities to justify the high levels of monetary commitment to BRI projects (Sadovskaya & Utyasheva, 2018).

For government planners, the BRI also presents possibilities to redress the perennial challenges to the expansion of international tourism for the country. There are undeniable possibilities to reduce the hindrances to growth of the sector's poor tourist infrastructure and improve amenities such as hotels, restaurants and attractions through BRI modernization projects. Organic images of the country as not being safe, poor customer services, as well as lack of awareness of the functional and experiential attributes of the destination may be tackled more effectively with the proposed intensive marketing strategies promoting the new Silk Road routes (UNWTO & Sunny Communications, 2017).

With tourism as part of the BRI agenda, there are yet questions on the extent to which the prospects of this extension of China's soft power may contribute to the BRI being more acceptable to stakeholders in frontier countries such as Kazakhstan. Sternberg et al. (2017, p. 10) contend there is a 'lack of transparency' with China's BRI plans resulting from a dearth of sufficient detailed information on the extent and scope of the country's BRI ambitions. They argue that the limited role of

local stakeholders in the planning of the BRI is likely to undermine the overall goodwill that may have been gained from China's expression of soft power. Bhavna (2018, p. 102) observes that in Kazakhstan there is some perception of a veil of secrecy on the share of Chinese investments on Silk Road infrastructure in relation to the 'credit obligations of the country'. This has contributed to some concern among Kazakh officials that the BRI's promise of modernization and infrastructure development may in the end be a lure into future indebtedness.

Using Kazakhstan as a case study, the aim of this paper is to assess the perceptions of tourism stakeholders as well as representatives of civic and business organizations who are likely influencers of opinion in the community, on the potential impacts of the BRI projects for tourism development the country. The first objective of this study is to determine their views of the likely perceived benefits and costs of the project using Social Exchange Theory (SET) that has been the most popular conceptual framework underpinning most studies examining host support for tourism development (Arghavan, Moyle, Scott, Kralj, & Nunkoo, 2019; Sharpley, 2014). The second objective of this enquiry is to assess the extent to which the SET framework is appropriate in this unique context of the complex BRI strategy that involves some tourism development projects.

Furthermore, as most studies on residents' attitudes have predominantly focused on dedicated tourism development in a single country, this study will also address the gap in the literature on local perceptions of multi-sectoral, regional infrastructural development projects that both include and impact tourism such as the proposed BRI. Relatedly, this study also seeks to extend knowledge on local attitudes to large-scale projects involving the cooptation and collaboration of several tourism destinations in a trans-regional strategy (Redi & Fernandez, 2018).

## Literature review

### *Resident attitudes and Social Exchange Theory*

Most studies examining residents' attitudes to tourism development tend to measure their perceptions of the benefits and costs of such development on their overall quality of life (Almeida García, Balbuena Vázquez, & Cortés Macías, 2015). This is guided by some calculation by residents that takes into account possible negative outcomes, and the extent to which these may be outweighed by the perceived benefits of greater opportunities for economic and social wellbeing (Lundberg, 2017; Sharpley, 2014; Zuo, Gursoy, & Wall, 2017).

Social Exchange Theory (SET) as an explanatory framework has been popularly employed by tourism scholars as it proposes that attitudes and support for tourism are usually rationally driven by the prospects of economic gain and self-interest (Almeida García et al., 2015; Sharpley, 2014). SET theory also explains the context of residents ceding their autonomy and control of local resources such as the sale of land to developers, and granting them tax concessions, and other fiscal incentives that are contingent to the promise of job opportunities and tourism revenues (Látková & Vogt, 2012, p. 52).

Generally, locals are supportive of tourism projects that promise economic, alongside civic and social improvements that affirm their own place attachment motivations (Almeida García et al., 2015, p. 34; Styliadis, Biran, Sit, & Szivas, 2014, p. 260). Consensus among residents that tourism development will ultimately enhance the future prosperity for the community has also been cited by Látková and Vogt (2012, p. 50) as an indicator for the success and sustainability of the sector. They maintain that the opinions of residents at the incipient stage of tourism development is a predictor of their attitudes towards the industry and willingness to support future tourism development (Keogh, 1990; Mason & Cheyne, 2000; Nepal, 2008; Sharpley, 2014). Studies on prospective development such as the BRI may therefore provide a benchmark of local attitudes, and indicate their sentiments on the likely implications for tourism development.

According to Látková and Vogt (2012, p. 53), SET proposes that residents' factual knowledge and also their perception of their ability, or sense of power to personally influence decision making related to the sector, act as strong predictors of their attitudes to tourism development. But with

China's BRI and the consequences for tourism development there is some information deficit, and there is not much detail that is available to guide local discussions. It is therefore likely that there may be inaccurate information and assumptions about the BRI project that are being held by locals. Nevertheless, the critical factor is whether public attitudes are shaped by positive associations of economic wellbeing and prosperity with China's BRI, rather than as an encroachment on their national sovereignty.

As a trans-border project, China's BRI also portend some risks of management and policing for local communities. With enhanced mobility attendant to more liberal visa regimes and the construction of new roads and transport links, there are also threats of criminality associated with international mafia gangs who deal in drugs and human trafficking. There have been negative news reports labelling 'Kazakhstan as a 'sex tourism hotspot' that have triggered government responses of increased surveillance and policing strategies to deter human trafficking to the country (Economic Times, 2014).

International media stories have also reported on the 'skimming of custom fees of goods' at the main transit points in Kazakhstan from China. Such allegations of a culture of bribery in Kazakhstan have been represented in the media as threatening the aspirations of the BRI project even though Kazakhstan's customs authorities have denied that these are widespread practices, and insist that they are not systemic, but isolated cases (Feng & Foy, 2017; Yu, 2017). According to Amighini (2017, p. 47), there are also substantial fears across Central Asia that the expansion of cross border corridors and links by BRI projects may also facilitate increased activity of 'transnational terrorism and radical Islamist insurgency, as well as the creation of safe bases for Uighur separatists and foreign terrorists'.

These risks may be perceived as likely negative impacts of infrastructural development by residents in Kazakhstan communities, particularly those in regions that directly border mainland China. But conversely, these modernization projects may also afford the opportunity for Kazakhstan to improve the country's competitive positioning as the foremost tourism destination in Central Asia (Murzamadiyeva, 2017; Nurgalieva, 2014). As Styliadis et al. (2014) argue, residents' positive attitudes to tourism development are also shaped by their view of the overall contribution of the sector to the enhancement of the destination's brand image in the global marketplace.

Studies have shown location to be a key factor influencing residents' attitudes to tourism development (Sharpley, 2014; Zuo et al., 2017). It is possible that residents located along Kazakhstan's border with China may view BRI and tourism development differently than those living in the urban centres. It is also not surprising that studies generally indicate that residents who work directly in the sector, or who benefit from the tourism multiplier effect in the community are usually supportive of tourism development. Other demographic characteristics of local residents that show some consistency for support for tourism include older residents, those with higher educational or cultural attainment and those with higher incomes (Almeida García et al., 2015). However, in relation to gender, women have been found in several studies to have a lower level of support for tourism development than men. This has been attributable to women being more aware, or more conscientious of the negative impacts of tourism development on socio-cultural cohesion and the environment (Almeida García et al., 2015, p. 37).

### ***Future tourism and brand image constructs***

Sharpley (2014, p. 45) points out that one of the limitations of SET is that it presupposes that hosts' attitudes are predominantly shaped by a 'rational appraisal' of the economic outcomes of their interaction with tourists. He contends that this singular approach does not fully account for other external socio-cultural factors that may be operating to influence resident attitudes. Relatedly, in a study of residents' attitudes to tourism development in three US Midwest communities at varying levels of tourism and economic development, Látková and Vogt (2012) found that personal benefits from tourism failed to predict support for future tourism development. This suggests that it is likely that in cases of prospective tourism development such as the BRI, residents' support for the tourism

project may not be necessarily based on expectations for direct personal benefits, but possible altruistic and psychological motivations not driven by economic reward (Zuo et al., 2017, p. 52).

Notably, the meta-narrative of the BRI is itself grounded in the notion of economic exchange and reciprocity that underpins SET as an explanatory framework. This means that the basis for the cooperation is firmly rooted in 'economic value' (Cropanzano & Mitchell, 2005, p. 880). Without any equivocation on China's part, the BRI has been extensively promoted as a mutually beneficial economic exchange for participating countries. But Sternberg et al. (2017, p. 10) also question whether for Silk Road countries, BRI promises of benefits risk them receiving 'unreciprocated Chinese business and tourism'. This contention by Sternberg et al. (2017, p. 10) is that there is some inherent risk for collaborating countries that in the future, they may be imperilled by their BRI obligations to China in regards to 'oil contracts, debt payments and rentier bureaucracies' that may not ultimately provide an equitable share of the 'benefits'. This points to the importance of measuring the attitudes of Kazakhstan tourism, civic and business stakeholders' attitudes to future development plans for tourism under the BRI, to determine whether there is some perception of risk that their local autonomy and overall sovereignty may be compromised by China's control of the investment landscape. It is possible that as Sternberg et al. (2017) claim, support for the BRI may be checked by the concerns of some locals of the likely negative impacts on Kazakhstan's self-determination.

According to Liu and Dunford (2016) BRI's association with the Silk Road has reinforced this perception of China's ambition to assert some spatial and geo-political hegemony in Central Asia. For bordering countries such as Kazakhstan, some locals view the BRI as symbolic of China's dominance in the region as Russian influence seems to lessen across Central Asia on an economic and developmental level. In this regard, there is some apprehension that China's BRI is a 'geopolitical and diplomatic strategy that will ultimately constrain the policy choices of receiving countries' (Summers, 2016, p. 1628). These widespread concerns in Kazakh communities have been reinforced by the growing numbers of Chinese working on railway and port construction projects which have led to complaints of them taking away local jobs (Burkhanov & Chen, 2016).

Arguably, by extension there may be some caution even among stakeholders on the long term impacts of the BRI's promotion of regional cooperation in tourism on the distinctiveness of Kazakhstan's destination image (Redi & Fernandez, 2018). It is reasonable to assume that while recognizing the benefits that regional collaboration can provide in economies of scale and scope, stakeholders may still question whether plans for the new Silk Road tourism are aligned to, or conflicts with Kazakhstan's own plans for building destination identity (Feng & Foy, 2017; Kassenova, 2018). Particularly, there may be potential tensions between the place image that residents have of Kazakhstan as a tourist destination and the overall regional marketing and branding strategies of the New Silk Road.

Stylidis et al. (2014, p. 270) claim that the place or brand image construct relates to the 'physical and social characteristics' that define the distinctiveness of a particular destination. Their study found that favourable place image was consequent to more positive attitudes towards the economic, socio-cultural and environmental impacts of tourism. In relation to the BRI, there is some basis to assess how Kazakhstan residents' support for the proposed development are linked to their perceptions of the image attributes of their country.

Following on this review of the literature, and to achieve the aim of this study to determine the attitudes of Kazakhstan stakeholders in tourism, and other business and civic organizations to the likely impacts of the New Silk Road (BRI), the following hypotheses have been generated:

- H1. There is a direct positive relationship between the perceived benefits of the BRI and support for tourism development
- H2. There is a direct negative relationship between perceived costs of the BRI and support for tourism development
- H3. There is a positive relationship between knowledge of the BRI plans and support for tourism development
- H4. There is a negative relationship between knowledge of the BRI plans and support for tourism development

H5. There is a direct positive relationship between perceptions of the benefits of the BRI and optimistic views of its contribution to Kazakhstan's brand image as a tourist destination

H6. There is a direct negative relationship between perceptions of the costs of the BRI and pessimistic views of its contribution to Kazakhstan's brand image as a tourist destination.

## Research methods

### *Questionnaire design and sampling*

The attitudes of local stakeholders in Kazakhstan to China's BRI on tourism were evaluated using a 5-point Likert Scale (1 = strongly agree to 5 = strongly disagree) questionnaire survey. The questionnaire design was adapted to the study context of Kazakhstan, and based on selected items that were empirically tested by previous studies reported by Látková and Vogt (2012); Lundberg (2017), Mason and Cheyne (2000), Styliadis et al. (2014) and Zuo et al. (2017). As they were expected to have some knowledge of tourism and awareness of the interface between BRI plans and the industry in Kazakhstan, the target population was tourism stakeholders and related civic and business organizations. These resident subgroups were deemed to have some influence or power on BRI plans and programmes in terms of future development. This sampling decision was also based on Sharpley's (2014, p. 47) view that there is some basis to focus on the attitudes of particular subgroups of residents who are 'most likely to influence the tourist experience' than the wider general public who may have limited contact with tourists.

As Kazakhstan may be considered to be at the exploratory stage of the tourism area lifecycle, is it apparent that only a small proportion of residents have direct contact with tourists and also have some knowledge of the BRI tourism development plans (Látková & Vogt, 2012, p. 51). Therefore, for the purposes of this study, residents who work in the tourism sector and affiliated private and public sectors were targeted rather than the general public. With the focus of the survey based on these subgroup of residents, variables such as age and income were not considered to be essential requirements for measurement as in some past studies. Hence the pertinent demographic characteristics of the resident subgroups selected for the questionnaire survey were gender, nationality, location in Kazakhstan and organizational affiliation.

Following on the work of Látková and Vogt (2012, p. 55) and Zuo et al. (2017, p. 56), constructs on the awareness and knowledge of the BRI as well as influence and power in decision making were included in the questionnaire. This was comprised of three items for respondents to indicate the extent of their objective and subjective knowledge of China's BRI plans, and how they related to the New Silk Road tourism development. These were followed by four statements on perceived benefits of tourism development, and then three items on perceived costs that were adapted from Zuo et al. (2017). The variables to measure residents' support for future tourism were based on four items from Látková and Vogt's (2012, p. 58) study which were used in a similar context to determine attitudes to a prospective tourism development. Residents brand image constructs were considered relevant for this study to assess the extent to which there may be some perception of the BRI regional tourism marketing posing a threat to Kazakhstan's distinctiveness as a destination. Two items to assess brand image perceptions were adapted from the work of Styliadis et al. (2014) to determine whether the BRI plans for tourism were perceived as potentially enhancing Kazakhstan's destination image in the international marketplace.

The questionnaire was first drafted in English by two UK based researchers and then reviewed by three Kazakhstan researchers to assess the validity and the clarity of items. This was followed by discussion by all the researchers on each item to decide on the final questionnaire draft (Styliadis et al., 2014, p. 266). Although there were no major changes to the items, there were revisions to some of the wording of the statements to maintain semantic consistency between the English and Russian translation. After the draft was agreed on by the research team, the final version of the questionnaire was distributed online and by paper copies that were delivered to the targeted companies by the Kazakhstan based researchers. The questionnaires distribution started with

**Table 1.** Differences observed according to gender.

Differences observed according to gender (male / female)	Degrees of freedom	Sample size	Chi-Squared value	Probability
Significantly more females than males strongly agree that 'The expansion of roads under China's BRI (along the New Silk Road) will potentially increase criminality and drug trafficking in Kazakhstan'	4	215	9.217	0.056
Significantly more females than males consider that 'Silk Road Tourism will lead to China having an influence over the decisions of regional and local governance, business decision making and autonomy in the tourism sector'	4	218	9.183	0.057

tourism officials, civic, business and NGO groups based in the city of Almaty, which is the former capital, and Kazakhstan's largest city. Also targeted were employees of organizations that though not directly in tourism, were affiliated with the industry such as the transportation and museum sectors. Employees in Non-Governmental Organisations (NGOs), UN agencies, charities and staff at Higher Education Institutions and universities that offer accreditation in tourism and hospitality were also represented in the sample.

The snowball sampling method was employed as the Russian based researchers observed that the study context in Kazakhstan featured a very low propensity in the population to participate in questionnaires. Consequently snowball sampling was used as a method of contact and a referral mechanism to garner a high response rate among the subgroups that were targeted for this study (Frey, 2018). Respondents who were initially contacted were encouraged to send the questionnaire to colleagues and acquaintances who work in the same sector. All respondents were over 18 years and were inclusive of Kazakhstan nationals and expatriate workers living in the country. The data collection period was just over three weeks between mid-February to March 2018. Some 400 questionnaires were distributed and a total of 240 responses were returned for this study which represent a response rate of 60%.

## Results

### *Sample profile of respondents*

There were fewer male (33.2%) than female (66.8%) respondents in the sample.

Most of the respondents were based in Almaty (92.9%) with (7.1%) based in other regions. (Tables 1 and 2)

Respondents directly working in or associated tourism organizations were at 19.7%, while there was a larger representation in the sample of residents who work in civic and other business organizations at 80.3%. This reflects the study context of Kazakhstan where the population of tourism stakeholders is comparatively less than those who work in civic and business organizations. (Table 3)

## Hypothesis 1

H1. There is a direct positive relationship between the perceived benefits of the New Silk Road (BRI) and support for tourism development

**Table 2.** Differences observed according to location.

Differences observed according to location (in Almaty or outside Almaty)	Degrees of freedom	Sample size	Chi-Squared value	Probability
Significantly more respondents outside of Almaty consider that: New Silk Road Tourism will create new business and job opportunities in Kazakhstan	4	185	17.994	0.001
Significantly more respondents in Almaty considered that 'The New Silk Road Tourism will encourage greater cultural cooperation in Central Asia'	4	183	10.602	0.31

**Table 3.** Summary of questionnaire responses (% of respondents).

Questionnaire	Agree / strongly agree	Don't know	Disagree / strongly disagree	No.	Mean	Std. Dev.
I know about China's BRI plans and how they relate to New Silk Road Tourism development	63.84%	29.02%	7.14%	224	2.23	0.942
China's BRI infrastructure will help develop more local tourism	62.84%	23.39%	13.76%	218	2.34	1.028
China's BRI infrastructure will help develop more international tourism in Kazakhstan	73.42%	17.12%	9.46%	222	2.15	0.937
Increased levels of tourism will lead to higher salaries and improved living standards in Kazakhstan	62.73%	24.55%	12.73%	220	2.30	1.006
New Silk Road Tourism will create new business and job opportunities in Kazakhstan	85.97%	9.50%	4.52%	221	1.90	0.778
China's BRI and the development of Silk Road Tourism will improve public amenities and transportation infrastructure that will benefit Kazakhstan	66.82%	21.82%	11.36%	220	2.21	1.000
The New Silk Road Tourism will encourage greater cultural cooperation in Central Asia	83.87%	12.44%	3.69%	218	1.89	0.776
The expansion of roads under China's BRI (along the New Silk Road) will potentially increase criminality and drug trafficking in Kazakhstan	46.51%	34.88%	18.60%	215	2.62	0.992
BRI will lead to China having an influence over the decisions of regional and local governance, business decision making and autonomy in the tourism sector	61.74%	29.82%	8.72%	218	2.29	0.909
Kazakhstan is developing a distinctive brand as a tourist destination	50.23%	27.19%	22.58%	217	2.60	1.080
BRIs New Silk Road tourism will threaten Kazakhstan's image as a tourist destination	29.58%	33.80%	36.62%	213	3.01	1.097
I support and will participate in plans for a common regional tourism strategy for Central Asia	51.61%	37.79%	10.60%	217	2.47	0.908
BRIs Silk Road Tourism should be included in economic planning for my region	72.35%	22.12%	5.53%	217	2.13	0.829
BRI New Silk Road tourism can be one of the most important economic development options for Kazakhstan	76.85%	16.20%	6.94%	216	2.07	0.881
Tourism should have a more important role in Kazakhstan	87.91%	6.98%	5.12%	215	1.77	0.860
BRIs New Silk Road tourism will promote Kazakhstan's natural beauty and cultural heritage	79.53%	10.23%	10.23%	215	2.03	0.934
There are local initiatives apart from China's BRI and development of New Silk Road infrastructure that will help improve Kazakhstan's brand image	65.75%	28.77%	5.48%	219	2.17	0.887

The Pearson Chi-square test was used to examine whether the proportion of respondents who perceived that the New Silk Road (BRI) would derive benefits for Kazakhstan varied with the proportion of those who supported the BRI. Some 76.85% of respondents considered that New Silk Road tourism could be one of the most important economic development options for Kazakhstan, an indication of their support for the BRI. This proportion of those who indicated support was compared with the 85.97% of respondents who considered that New Silk Road tourism would create new business and job opportunities in Kazakhstan (the comparison excluded those who stated that they 'did not know'). The Pearson Chi-square of  $(1, N = 165) = 29.648, p = 0.000$ , and a Likelihood Ratio of  $14.205, p = 0.000$  indicate that these two proportions were strongly positively associated, and unlikely to have occurred due to chance.

This proportion was also compared with the total of 62.73% of respondents who considered that the BRI would lead to higher salaries and improved living standards in Kazakhstan. The Pearson Chi-square of  $(1, N = 140) = 16.961, p = 0.000$ , and Likelihood Ratio of  $12.273, p = 0.000$  again indicated that these two proportions were strongly associated and the proportions were unlikely to have occurred due to chance. On this basis, there was support for this hypothesis of a positive relationship between the perceived benefits and the support for the BRI.

## Hypothesis 2

H2. There is a direct negative relationship between perceived costs of the BRI and support for tourism development

The Pearson Chi-square test was used to examine whether the proportion of respondents who held a negative view of the perceived costs of the BRI varied with the proportion who supported tourism development. The same total of 76.85% of respondents who considered the New Silk Road tourism to be one of the most important economic development options for Kazakhstan, was compared with the total of 46.51% who felt that the expansion of roads under China's BRI would potentially increase criminality and drug trafficking in Kazakhstan. Again, the comparison excluded those who had indicated that they 'did not know'. The result was not statistically significant with a Pearson Chi-square ( $1, N = 122$ ) = 0.434,  $p = 0.510$ , and a Likelihood Ratio of 0.414,  $p = 0.520$ .

The proportion indicating support for the BRI was also compared with the total of 61.47% who felt that Silk Road Tourism would lead to China having an influence over the decisions of regional and local governance, business decision making and autonomy in the tourism sector. The two proportions indicated a positive relationship and was statistically significant with a Pearson chi-square of ( $1, N = 136$ ) = 10.237,  $p = 0.001$  and a Likelihood Ratio of 7.333,  $p = 0.007$ , and therefore unlikely to have occurred due to chance. These results indicate that respondents supported the BRI in spite of the perceived costs of increased Chinese influence.

The proportion indicating support for the BRI was also compared with the total of 29.58% of respondents who felt that it would threaten Kazakhstan's image as a tourist destination, and the 36.62% who considered that it would not. The result was statistically significant with a Pearson Chi-square value of ( $1, N = 123$ ) = 5.871,  $p = 0.016$ , and a Likelihood Ratio of 6.711,  $p = 0.010$ . This result point to overwhelming support for the BRI although respondents were divided as to whether it would threaten Kazakhstan's existing tourism brand. Consequently, the findings show that there was no support for this hypothesis of a negative relationship between the perceived costs BRI and support for tourism development. This implies that there was sustained support for BRI despite awareness of the likely costs in terms of increased criminality, potential increased Chinese influence and some negative effect on Kazakhstan's existing tourism brand.

## Hypotheses 3 and 4

H3. There is a positive relationship between knowledge of the BRI plans and support for tourism development

H4. There is a negative relationship between knowledge of the BRI plans and support for tourism development

A total of 63.84% of respondents claimed that they knew about China's BRI plans and how they related to the New Silk Road Tourism development. This was compared to the total of 76.85% who considered that it could be one of the most important economic development options for Kazakhstan. The Pearson Chi-square value of ( $16, N = 214$ ) = 64.406  $p = 0.000$ , and Likelihood Ratio of 60.997  $p = 0.000$ , indicated that knowledge of the BRI and support for it was positively associated. The proportion indicating support was also compared to the total of 87.91% who felt that tourism should have a more important role in Kazakhstan, and was statistically significant, with a Pearson chi-square value is ( $d/f = 16, N = 214$ ) Pearson chi-square = 34.857,  $p = 0.004$ , Likelihood Ratio of 32.781,  $p = 0.008$  and therefore not likely to be due to chance. These findings affirmed hypothesis 3 of a positive relationship between the knowledge of the BRI and support for tourism development; and rejected hypothesis 4 of a negative relationship between knowledge of BRI plans and support for tourism development.

## Hypothesis 5

H5. There is a direct positive relationship between perceptions of the benefits of the BRI and optimistic views of its contribution to Kazakhstan's brand image as a tourist destination

The Pearson Chi-square test was used to examine whether the proportion of respondents with an optimistic view of the perception of benefits of the BRI was associated with the views of its contribution to Kazakhstan's brand as a tourist destination. The proportion of respondents who considered that the BRI would contribute to international tourism in Kazakhstan was 73.42%. This was compared with the 79.54% who considered that New Silk Road (BRI) tourism would promote Kazakhstan's natural beauty and cultural heritage. The result was statistically significant with a Pearson Chi-square statistic of  $(1, N = 160) = 15.040, p = 0.000$ , Likelihood Ratio of 10.284,  $p = 0.001$ .

The comparison was also made between the 85.97% of those respondents who considered that New Silk Road Tourism would create new business and job opportunities, with the 29.58% of respondents who considered that it would threaten Kazakhstan's brand image as a tourist destination. The result was statistically significant with a Pearson Chi-square statistic of  $(1, N = 130) = 6.867, p = 0.009$ , Likelihood Ratio of 9.875,  $p = 0.002$ , indicating that the association of these variables was not likely due to chance. Overall the findings suggest that while there was overwhelming support for the notion that tourism would benefit businesses and employment, there some divided opinion as to whether China's BRI plans would threaten Kazakhstan's tourism brand. This means there was no support for this hypothesis that the benefits of the BRI would enhance Kazakhstan's brand image.

## Hypothesis 6

H6. There is a direct relationship between perceptions of the costs of the BRI and pessimistic views of its contribution to Kazakhstan's brand image as a tourist destination

The proportion of respondents with a negative view that the costs of the BRI would lead to increased criminality was 46.51%, while 29.58 considered that it would threaten Kazakhstan's image as a tourist destination. This was statistically significant with a Pearson Chi-square statistic of  $(1, N = 103) = 38.875, p = 0.000$ , Likelihood Ratio of 44.879,  $p = 0.000$ . The 61.47% of respondents who considered that China's dominance of the New Silk Road undermined local governance, business decision-making and autonomy in the tourism sector, was compared with the 29.58% of respondents who considered that the New Silk Road Tourism threatened Kazakhstan's image as a tourist destination. The result was a Pearson Chi-square statistic of  $(1, N = 112) = 19.984, p = 0.000$ , Likelihood Ratio of 25.728,  $p = 0.000$  again indicating that the association between these proportions was not likely to be due to chance. These findings suggest that respondents held the view that China's dominance of BRI would undermine local governance and that overall it would threaten Kazakhstan's distinctive brand as a tourism destination.

## Discussion

### *Relationship between perceived benefits of BRI and support for tourism*

The main purpose of this study was to assess whether the SET framework was applicable in measuring residents' attitudes in the complex landscape of China's BRI and tourism development in Kazakhstan. The results indicated that SET produced some relative measurements of residents' perceptions of the perceived benefits and costs of BRI tourism related development. Largely, the findings of this study were consistent with general claims in the literature that perceived economic benefits mainly influenced positive resident attitudes to tourism development (Almeida García et al., 2015; Sharpley, 2014).

This suggests that for the respondents, the tourism sector is deemed as a likely winner from China's BRI's projects that may create new opportunities for jobs and overall prosperity for the country. The findings confirm the hypotheses of a strong positive relationship between perceptions of the benefits of the BRI and support for tourism development in Kazakhstan. Tourism stakeholders as well as with those in civic and business organizations seemed to hold the view that even with the overarching financial costs of infrastructure development, with the risks of increased indebtedness,

and the possible rise of criminality with improved road access, the BRI was beneficial for tourism development in the country.

This high level of support may seem somewhat incongruous within the context of some gap of information on the specific plans of China's BRI, and even less on the extent of local involvement in these projects (Sternberg et al., 2017). But the findings point to a high level of awareness of the BRI that was positively associated with a strong support for tourism development. The context for high levels of awareness of China's BRI maybe consequent to the positive capacity building and promotional activities of the BRI's 'people to people' cultural exchange projects. But it is also likely that China's BRI has significant appeal for tourism stakeholders such as tour operators and travel agents, in that it proposes a massive modernization programme that provides the much-needed capital investment for tourism consolidation and expansion. China's BRI therefore offers the prospect of dismantling age-old infrastructural limitations that have been major hindrances to the ability of the tourism sector to harness the full potential of Kazakhstan's tourism industry (Kantarci, 2007).

### ***Perceptions of costs and lack of support for BRI***

Nevertheless, in the wake of bullish support, there was some acknowledgement of underlying concerns for the likely adverse impacts of increasing criminality with enhanced trans-border links. This was more apparent apprehension among tour operators and travel agents of these risks than other civic and business group. This may signal some early wariness of the safety and security implications of BRI plans among tourism stakeholders.

There were also indications that the BRI would lead to increased Chinese dominance and less autonomy for stakeholders in local affairs. This was particularly the case among women who were more cautious than men of the implications of increased crime, loss of stakeholder autonomy and the overall brand identity of Kazakhstan consequent to the BRI. These findings were consistent with past studies reporting women to be more aware and having more concerns about the negative impacts of tourism development (Almeida García et al., 2015; Mason & Cheyne, 2000; Stylidis et al., 2014; Zuo et al., 2017). This pattern of gender differences suggests that women may not be as driven by economic motives and perhaps were influenced by other social and psychological motivations that were not observed in this study. Moreover, this may also point to some limitation in the application of SET in the context of the BRI where the overall project itself has been rooted in notions of economic exchange and win-win cooperation (Liu & Dunford, 2016). This may account for the results indicating that there was less certainty as to whether the BRI would lead to greater cultural cooperation, as this aspect of the SET framework was of less direct economic benefit to most stakeholders.

Generally, there was not much heterogeneity of views across the sample between the different stakeholders of residents who work in the tourism industry and those that represent civic and other business organizations. The extensive support for China's BRI tourism projects suggests that there was some readiness within the sector and other key civic and business groups to endorse and support this ambitious transboundary programme.

While the tourism sector stands to benefit from the initiative, the BRI may in turn gain from a mobilized tourism industry in Kazakhstan that is generally perceived favourably by the wider community for its economic prowess, and promotion of a positive brand image of the country in the global tourism marketplace. As an industry, tourism plays a major role and function in the preservation of cultural and heritage assets, the modernization of infrastructure, and invocation of national pride and identity in destination branding.

But these findings also raise a cautionary note in terms of overall support for the BRI in enhancing the brand image of Kazakhstan, as there was some divided opinion among respondents that the BRI would benefit the destination's distinctive identity as a tourist destination. It is reasonable to infer, that while respondents seemed to value the contribution of the BRI to infrastructure development

and modernization as beneficial to the tourism sector, yet they were not entirely convinced it would equally enhance the brand image of the destination. In this context, expressions of a strong place attachment seemed to oppose the transnational and regional framework of the BRI project. While this result is in contradiction to the findings of Styliadis et al. (2014) that positive place image of residents are associated with support for tourism development, it is likely that as the BRI is not a dedicated, singular tourism development initiative in the destination, it is not really seen as an enhancing factor for Kazakhstan's brand image. This suggests that as the multi-sectoral, transboundary mega projects of the BRI evolves, there may be calls for more focused marketing strategies to differentiate and leverage the distinctive attributes and touristic experiences of Kazakhstan, in relation to other destinations of the Silk Road in Central Asia.

## Conclusion

### *Managerial implications and recommendations*

While most studies on residents' attitudes have predominantly focused on dedicated tourism developments, this study has addressed a gap in the literature by examining local attitudes to a multi-sectoral, trans-border project involving tourism represented by China's BRI. The findings mainly support the application of the SET framework in this context of a multi-sectoral project, as it produced a benchmark of the attitudes of different resident subgroups to the proposed impacts of the BRI on tourism development in Kazakhstan. As an exploratory study of local perceptions of the impacts on tourism development, this research also provides a baseline for further longitudinal studies to track the evolution of attitudes over time as BRI development progresses.

While there is some strong backing for the BRI plans for the tourism industry across tourism, civic and business stakeholders, yet there is less support for the symbolic and cultural dimensions of BRI development. This implies that residents' maybe more convinced about the benefits of the 'bricks and mortar' projects, and less welcoming of cultural 'people to people' integration. It is conceivable that as an extension of China's soft power diplomacy the BRI is being resisted by locals, and may be indicative of underlying suspicion and longstanding local fears of the invasion of Chinese migrants taking jobs and buying up local land.

Government planners must therefore consider that favourable views of the BRI may be undermined if there is too much emphasis on China's soft power activities. This means there should be some restraint in government planners actively promoting Chinese cultural awareness as a means of engendering trust and support among the local community. Consequently, it is recommended that planners employ bottom up consultation and citizen engagement in decision making as the BRI project is implemented across communities. There is the option of launching public education programmes that not only seek to increase awareness of the BRI, but also highlight local business opportunities and sectoral linkages to tap into the growth in tourist traffic along Silk Road routes. It is also important for BRI public education programmes to also consider and prioritize the needs and concerns of women who have conveyed more awareness, and perhaps vulnerability to the risks and threats of the BRI.

Whereas most research applying the SET framework have focused on measuring resident attitudes to existing tourism development, the application of the SET framework in this study supports its utility in mapping the likely impacts of a prospective mega development on the tourism sector. This study has shown that the SET framework is also effective to measure attitudes to development projects that impact tourism that extend beyond the borders of an individual destination. For this study, the SET framework has been useful in locating the extent of stakeholders' support for the tourism dimensions of the BRI, and in identifying specific disaffected groups and areas of dissonance to the BRI plans. As such it provides the basis for the design of consultative activities for citizen engagement to solicit local support which is essential for development projects at the level of scope and scale of the BRI.

But this study also points to the limitations of SET as an explanatory framework to assess symbolic and other altruistic factors influencing residents' attitudes to BRI, particularly as the strategy is based on an economic rationale of exchange and win-win propositions for participating countries. Future studies should therefore consider combining attitudinal surveys using SET along with qualitative enquiries to determine how non-economic variables such as trust may be influencing Kazakhstan's residents' views of the BRI (Zuo et al., 2017). Following on this study, further research should extend the sample to include residents in towns and villages across Kazakhstan beyond the resident sub-groups that were the focus of this study. This would provide a more comprehensive perspective of the awareness and sentiments towards the BRI of the resident population. It is also important in studies of the attitudes of residents to observe whether there are significant differences in views between residents in rural villages located closer to mainland China, in relation those in the main urban centres closer to the capital in terms of the level of support for the BRI. Comparative studies may also be undertaken in other Silk Road Central Asian destinations such as Kyrgyzstan, Uzbekistan and Tajikistan to determine whether there are differing sentiments across these individual nation states that are at the core of China's New Silk Road.

The BRI is yet evolving, and as more specific policies and projects are rolled out, the exact scope and ambition of the project will become clearer. But as this study has shown, there is some unanimity of views among Kazakh citizens that the BRI will deliver economic and developmental spinoffs for the tourism sector. These perceptions however have not entirely eroded some underlying opinions of distrust or fear of China's growing presence and influence, which seem likely to escalate if the BRI is deemed to lead to more indebtedness and limited economic rewards for Kazakh citizens. This suggests that the tide of sentiment may turn against BRI projects if the ambitions of the projects fail to realize economic growth. Furthermore, government planners should note that it is not likely that the 'people to people' cultural cooperation will foster any more goodwill for China, as these sub-groups of Kazakh citizens seemed to be more concerned with economic development rather than closer cultural ties with China.

Although the BRI is unparalleled in scope and ambition as a 'global, inclusive regional cooperative' project (Liu & Dunford, 2016), yet it also typifies the increasing complexity of tourism development in today's landscape. Increasingly across the globe, tourism development is featured as part of integrated projects with wider development spatial goals such as regeneration corridors linked to stimulus programmes for lagging regions.

### ***Limitations of the study***

There are some limitations to the inferences drawn from this study in relation to Kazakhstan as the snowball sampling resulted in most of the respondents based in the city of Almaty. It is likely that location may be a factor in differentiating residents' attitudes, as the findings of this study suggest that residents outside of Almaty seem more favourable to the BRI. This also confirms past research that report that residents in regions closest to the Chinese border seem more welcoming of the BRI than those in the interior. Even though they are not traditional tourist areas, regions in East Kazakhstan such as Oskamen and Karaganda may record increases in domestic tourism and neighbouring countries facilitated by ease of access built by BRI projects. Already there is some evidence of the impacts of the road infrastructure development of the BRI, with more tourist traffic from the capital Astana to the resort of Borovoe in the north of the country, which has cut journey times from 4–5 hours to 2–3 hours.

Undoubtedly domestic and regional tourism is likely to potentially reap significant benefit from BRI plans to improve and expand road infrastructure and high-speed rail networks. Less certain is the extent to which such projects will stimulate growth in international tourism in the short term that currently depend mainly on travel by air. Essentially, it is the prospects of trans-border tour packages facilitated by visa-free travel for tourists along the traditional Silk Road routes that promise more immediate significant growth for international tourism. Nonetheless these are early

days of BRI plans, as Chinese tourists currently do not have visa-free status to Kazakhstan, and it is unlikely that they will be an upsurge in visitor arrivals to the country from the mainland if this was granted in the short term. Tour operators point to some apathy in the Chinese market towards Kazakhstan on the basis that as a brand it has limited appeal to excite and entertain Chinese tourists seeking novel or exciting vacation experiences.

This means that there is an imperative for government officials in Kazakhstan to strategically plan on the country level to enhance product offerings that will increase the appeal of the country to both Chinese and international tourists. This is vital to ensure that with the BRI, Kazakhstan is not just positioned as a transit zone or 'land bridge' to only transport tangible goods from China to the West. As an economic sector, to some extent, tourism provides the means to exploit the new infrastructure corridors of the BRI as a stimulus to provide the access, amenities and attractions that are essential to increase tourism demand to the country.

But the question as to whether all roads will be leading to and from the Chinese mainland will be answered in the coming decade, as China has plans to gain over 'US\$2.5 trillion in trade with BRI countries, and for some 500 million Chinese tourists' to visit Silk Road countries (Laruelle, 2018, p. 71). For countries bordering China such as Kazakhstan, this means that there is some urgency to plan for the inevitable changes that will occur with BRI tourism projects. As this study of the perceptions of Kazakh locals has shown, there is some typical euphoria at this incipient stage of development with the expectation of economic gain. But as China steers the course of BRI development, it is the responsibility of each Silk Road destination such as Kazakhstan, to maximize the potential benefits of infrastructure expansion, while controlling the rate and pace of growth, so that the benefits of tourism are judiciously managed to maintain some consensus of community well-being.

## Disclosure statement

No potential conflict of interest was reported by the authors.

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