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Kentucky 2021 Advertising ROI Research

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Background and Purpose

- In 2021, Kentucky launched their advertising campaign in key markets.
 - The campaign consisted of both traditional and online media including:
 - Video
 - Print
 - Banner
 - Radio
 - Social
 - Out-of-home
- Longwoods was engaged to conduct a program of research designed to:
 - Measure the effectiveness of the advertising campaign in getting Kentuckians to travel within Kentucky during the campaign period and shortly thereafter, and increasing intentions to visit in the future.
 - Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Kentucky, and incremental taxes generated by that spending.
 - Through an analysis of Kentucky's image, provide input into the development of positioning and messaging for future campaigns.

Research Objectives

- The objectives of the research were to measure:
 - Awareness of Kentucky as a desirable vacation destination.
 - Awareness of Kentucky's advertising activity, i.e., individual advertising elements.
 - Impact of Kentucky's advertising on:
 - Kentucky's image.
 - Actual visits in Kentucky during and shortly after the campaign period.
 - The relative importance of image factors in getting on the destination wish list.
 - Impact of Kentucky's advertising on conversion and intentions to visit by media combinations and markets.

Method

- A benchmark study was conducted after the conclusion of the advertising period to measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit and image, and measure short-term conversion that occurred during and shortly after the campaign period.
 - A Kentucky self-completion survey of 2,005 respondents in the advertising markets, distributed as follows:

New Markets	
Greenville/Spartanburg DMA	60
Dallas/Fort Worth DMA	140
Philadelphia DMA	151
Orlando/Daytona Beach/Melbourne DMA	80
Charlotte DMA	80
Detroit DMA	110
Washington DC DMA	141
Milwaukee DMA	55
Minneapolis/St. Paul, DMA	85
Dayton DMA	30
	20
Charleston/Huntington DMA (non-KY counties)	
Grand Rapids/Kalamazoo/Battle Creek DMA	50

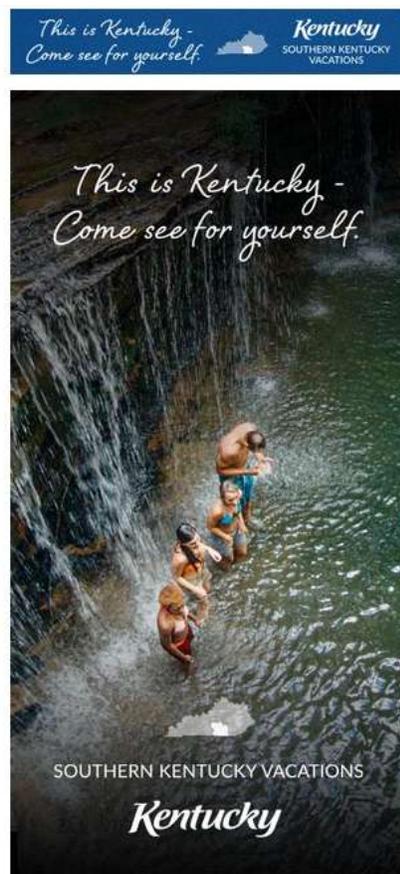
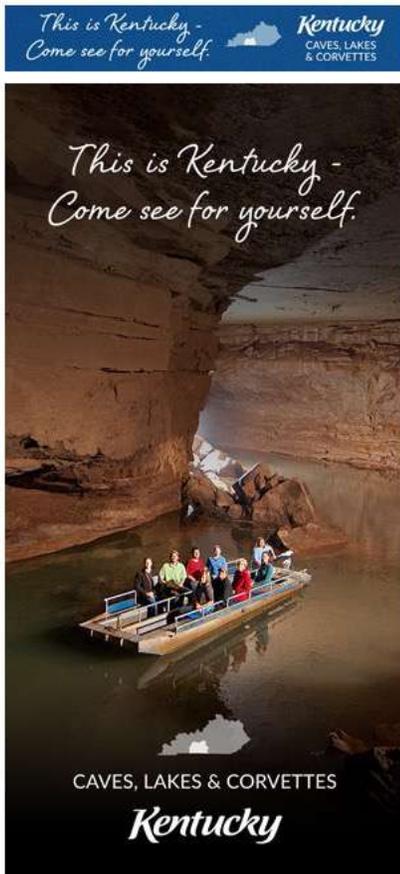
Existing Markets	
Bowling Green DMA	10
Cincinnati DMA	60
Evansville DMA	20
Knoxville DMA	38
Lexington DMA	35
Louisville DMA	47
Memphis DMA	45
Nashville DMA	75
Paducah-Harrisburg DMA (KY counties only)	25
Indianapolis DMA	75
Columbus, OH DMA	65
Chicago DMA	230
Atlanta DMA	180
Saint Louis DMA	80
Tri-Cities DMA (KY counties only)	8
Charleston/Huntington DMA (KY counties only)	10

Method (Cont'd)

- Respondents are members of a major online consumer research panel.
- Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
- Sample was drawn to be proportionate to population by specific states/cities, age, sex and income.
- The survey took an average of 17 minutes to complete.
- During the survey respondents were shown copies of the advertising materials. This was done at the end of the survey as not to bias earlier questions on attitudes towards Kentucky and other behavioral measures.
- The fieldwork was conducted in March 2022
- Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population.
- For a sample of this size, the confidence level is + / – 2.5%, 19 times out of 20.

Method (Cont'd)

- The estimates of the campaign's impacts on visits and intentions to visit Kentucky are conservative in that:
 - Trips taken/intended by people in the absence of advertising are backed out.
 - Conservative control procedures help ensure that only advertising-influenced trips are included.
- Unless otherwise noted, results shown are representative of all respondents surveyed (n=2,005 travelers).



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Conclusions and Recommendations

Key Findings

- Almost half of travelers in Kentucky's total advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. Half of travelers in Kentucky's existing markets recalled seeing at least one ad, while four in ten of travelers in Kentucky's new markets did.
- Each media type included in the survey had similar levels of recall. Looking at total advertising markets, a third recalled at least one video, three in ten recalled at least one print or radio ad, and a quarter recalled at least one banner, OOH, or social media ad.
- Looking at advertising awareness by campaign, those with the highest awareness was the CARES Family Traveler, the Fall AOR, the Regional Campaigns, and Spring AOR. Notably, a third of travelers recalled at least one ad from the CARES Hispanic Traveler and CARES Black Traveler campaigns.
- Two in ten travelers in Kentucky's total markets were aware of the Kentucky Tourism website, with seven in ten of those travelers finding it very helpful.
- In the markets included in this study, there were an estimated 398 million ad exposures over the campaign period. Radio ads (118 million exposures) showing highest frequency of recall, followed by video (90 million exposures), print (59 million exposures), and banner ads (58 million exposures).

Key Findings (Cont'd)

- When we relate the number of ad exposures recalled to the specific amount of money spent on the ads by medium, OOH ads constituted the most efficient medium in terms of generating recall per dollar spent, at \$2 per thousand of exposures recalled, followed by radio (\$10 per thousand of exposures recalled) and social media (\$12 per thousand of exposures recalled).
- The campaigns included in this study produced an additional 4.1 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising. 2.7 million of those incremental trips were from existing markets, and 1.4 million from new markets.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$542.4 million on those trips. When related to advertising costs of \$8.2 million, this translates into a return on investment of \$66 in visitor spending for each ad dollar spent. This is the best result in the four years Kentucky has conducted this survey with Longwoods
 - \$314.1 million of that incremental spending came from existing markets, and when related to advertising costs of \$6 million, results in a spending ROI of \$53 for every advertising dollar spent.
 - \$228.3 million of that incremental spending came from new markets, and when related to advertising costs of \$2.3 million, results in a spending ROI of \$101 for every advertising dollar spent.

Key Findings (Cont'd)

- Looking at total markets, KDT spent \$2.00 for every incremental trip taken. This is Kentucky's best result in this metric since 2018's \$1.86.
- Those incremental expenditures in total advertising markets yielded \$43.1 million in state and local taxes. There was a return on investment of \$5 in taxes for each ad dollar spent.
 - For existing markets, there was \$25 million in incremental state and local taxes, and a tax ROI of \$4.
 - For new markets, there was \$18.1 million in incremental state and local taxes, and a tax ROI of \$8.
- For a destination in Kentucky's competitive set to get on travelers' consideration list, it must, first and foremost, be perceived to:
 - Be **exciting** – being seen as exciting means being a must-see place to visit, offering a real sense of fun, excitement, and adventure.
 - Be suitable for **adults** and couples – which is logical, since they are paying for the vacation.
- Hot Buttons are the 10 individual image battery statements most closely associated with the key predictive variable in the study, "A place I would really enjoy visiting". These were developed for total advertising markets, as well as existing and new markets. The four attributes appearing in all three lists are: an interesting place; an exciting place; must see destination; and lots to see and do.

Key Findings (Cont'd)

- These campaigns had a positive impact on travelers' perceptions of Kentucky. Looking at the total advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study, with the following hot buttons showing 20 point or more lift: must-see destination; an exciting place; and a fun place. In fact, there are no variables where significantly more travelers unaware of the advertising rated Kentucky higher than those who were aware of the KDT campaign.
- Recent visitation to the state positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study on the total advertising markets level. The following Hot Buttons had a lift of over 15 points: must see destination; an exciting place; a fun place; lots of things to see and do; great for sightseeing; is an interesting place; and good for couples
- Longwood's Halo Effect research measures the impact of KDT's advertising as well as visitation to the state on Kentucky's reputation on broader economic impact areas outside of tourism. Looking at the total advertising markets, in every case, Kentucky's tourism advertising significantly improved the image of Kentucky for a wide range of economic development objectives. Visitation significantly improved the image of Kentucky for all variables as well. For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Kentucky.
 - New markets saw a more pronounced halo effect lift than existing markets.

Key Findings (Cont'd)

- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their total advertising markets. Tennessee and Georgia offer the strongest challenge to Kentucky in the competitive set.
- Over half of travelers within the total advertising markets have visited Kentucky during their lifetimes. Seven in ten travelers in existing markets have visited, while less than half in new markets have.
- Among travelers who visited Kentucky overnight, the two most popular activities were shopping and trying unique/local foods.



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Main Findings: Advertising Impacts



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**Advertising
Awareness**

Advertising Awareness

- Almost half (44%) of travelers in Kentucky's total advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad.
 - Half (50%) of travelers in Kentucky's existing markets recalled seeing at least one ad, while four in ten (39%) of travelers in Kentucky's new markets did.
- Each media type included in the survey had similar levels of recall. Looking at total advertising markets, a third (35%) recalled at least one video, three in ten recalled at least one print (29%) or radio (29%) ad, and a quarter recalled at least one banner (26%), OOH (26%), or social media (24%) ad.
 - For existing markets, the levels of recall range between 37% of travelers recalling at least one video ad to 24% recalling at least one social media ad.
 - For new markets, the levels of recall range between 33% of travelers recalling at least one video ad to 20% recalling at least one social media ad.
- Looking at advertising awareness by campaign, those with the highest awareness was the CARES Family Traveler (43%), the Fall AOR (41%), the Regional Campaigns (40%), and Spring AOR (36%).
 - A third of travelers recalled at least one ad from the CARES Hispanic Traveler (34%) and CARES Black Traveler (32%) campaigns.

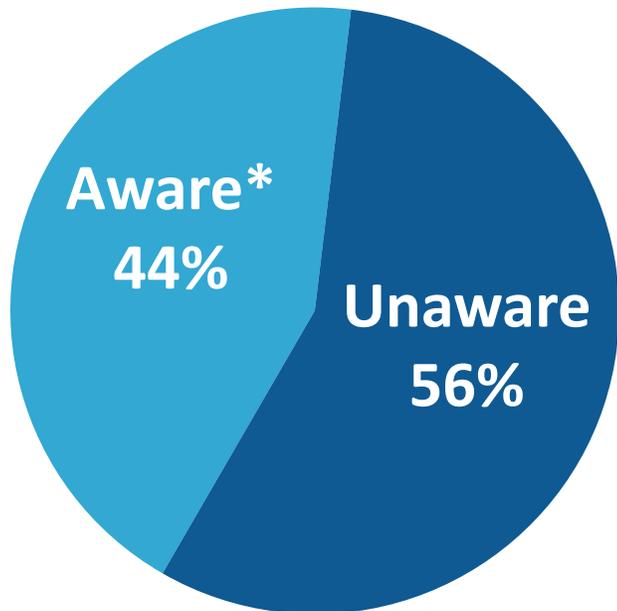
Advertising Awareness (Cont'd)

- The ads with the highest level of recall were:
 - Fall AOR – Video 2 (37%)
 - Spring AOR – Broadcast (36%)
 - Fall AOR – Video 1 (34%)
 - CARES Family Traveler - Broadcast (32%)
 - Spring AOR – Radio 2 (31%)
 - Spring AOR – Radio 1 (31%)
- Two in ten (19%) were aware of the Kentucky Tourism website, with seven in ten (71%) of those travelers finding it very helpful.
- Among travelers in the total advertising markets who recalled at least one KDT ad, a third (32%) conducted an internet search to obtain more information about traveling to Kentucky, and two in ten researched the state on social media (20%) or visited www.KentuckyTourism.com (19%).

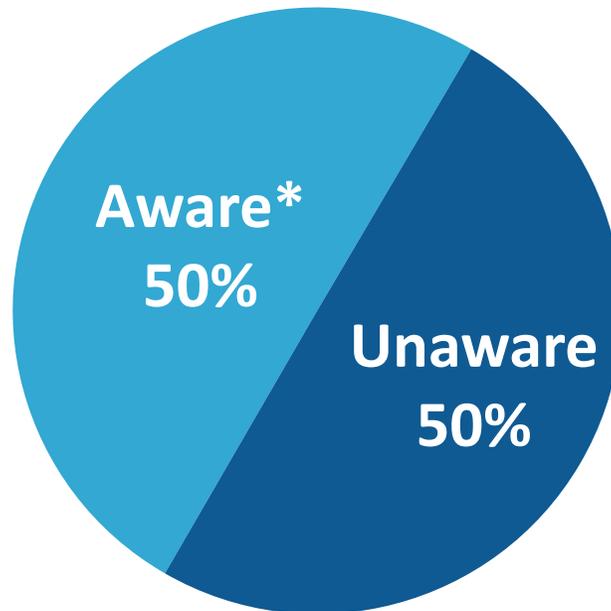
Awareness of the Ad Campaign

Base: Residents of Kentucky's Advertising Markets

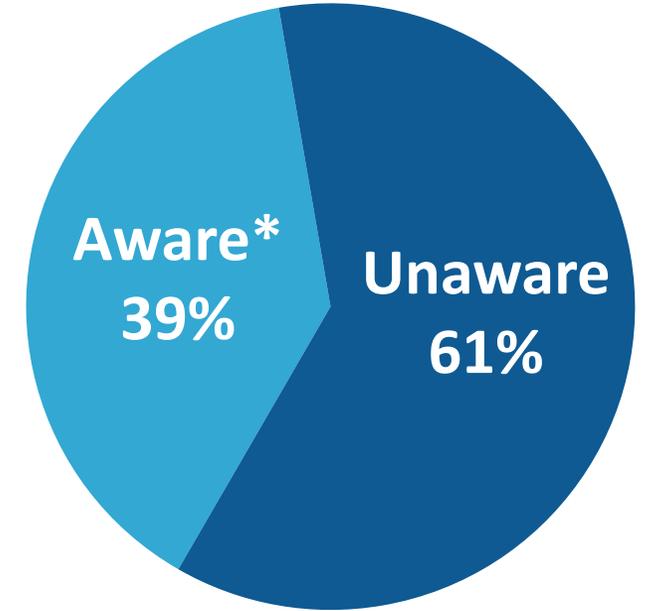
Total



Existing Markets



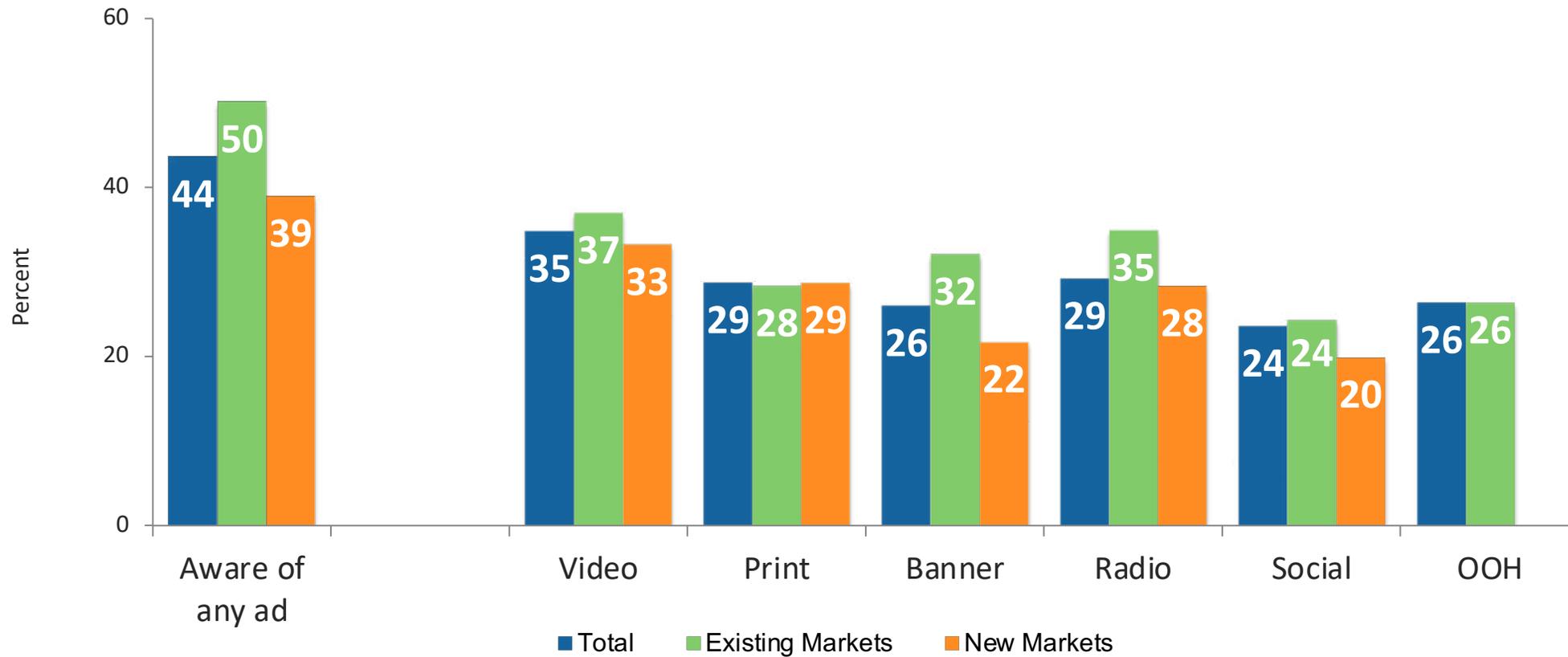
New Markets



*Saw at least one ad

Advertising Awareness* by Medium

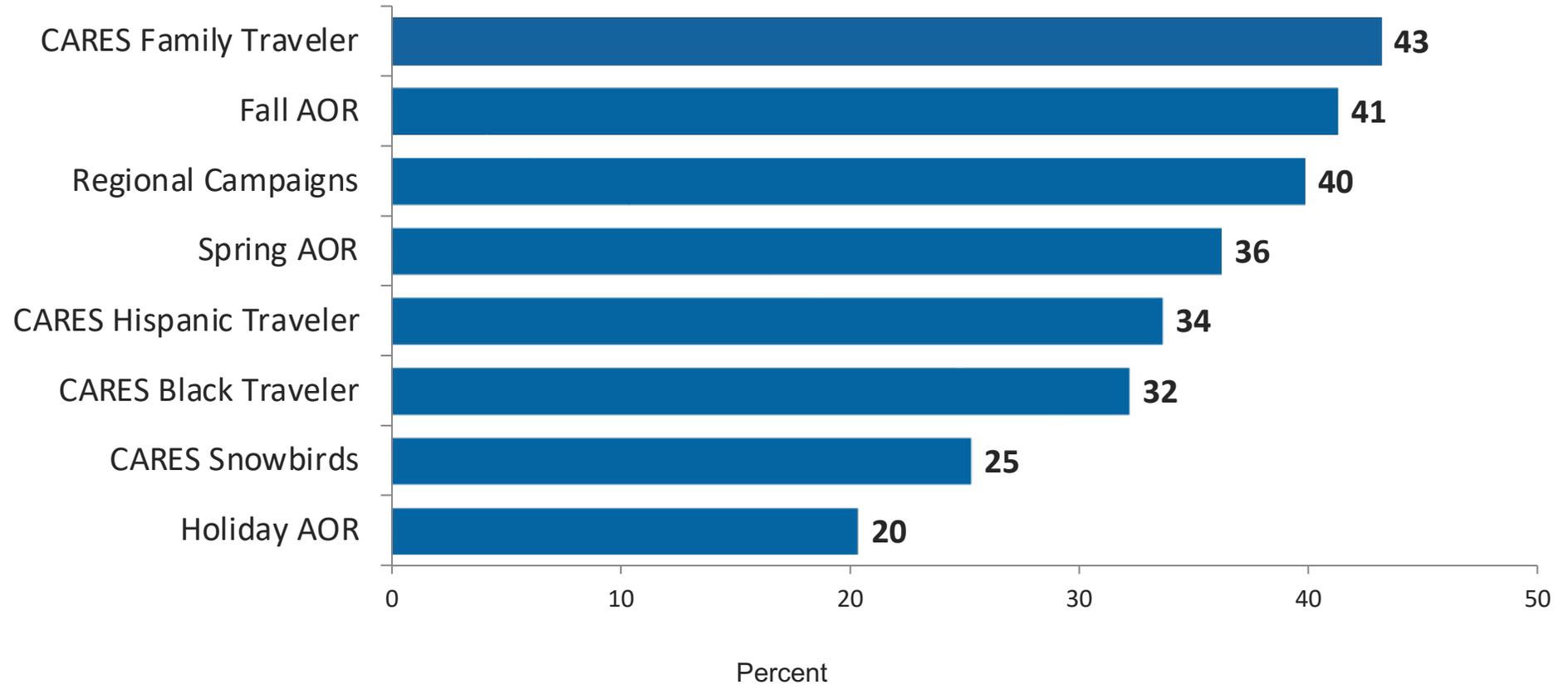
Base: Residents of Kentucky's Advertising Markets



*Saw at least one ad and based on markets where shown

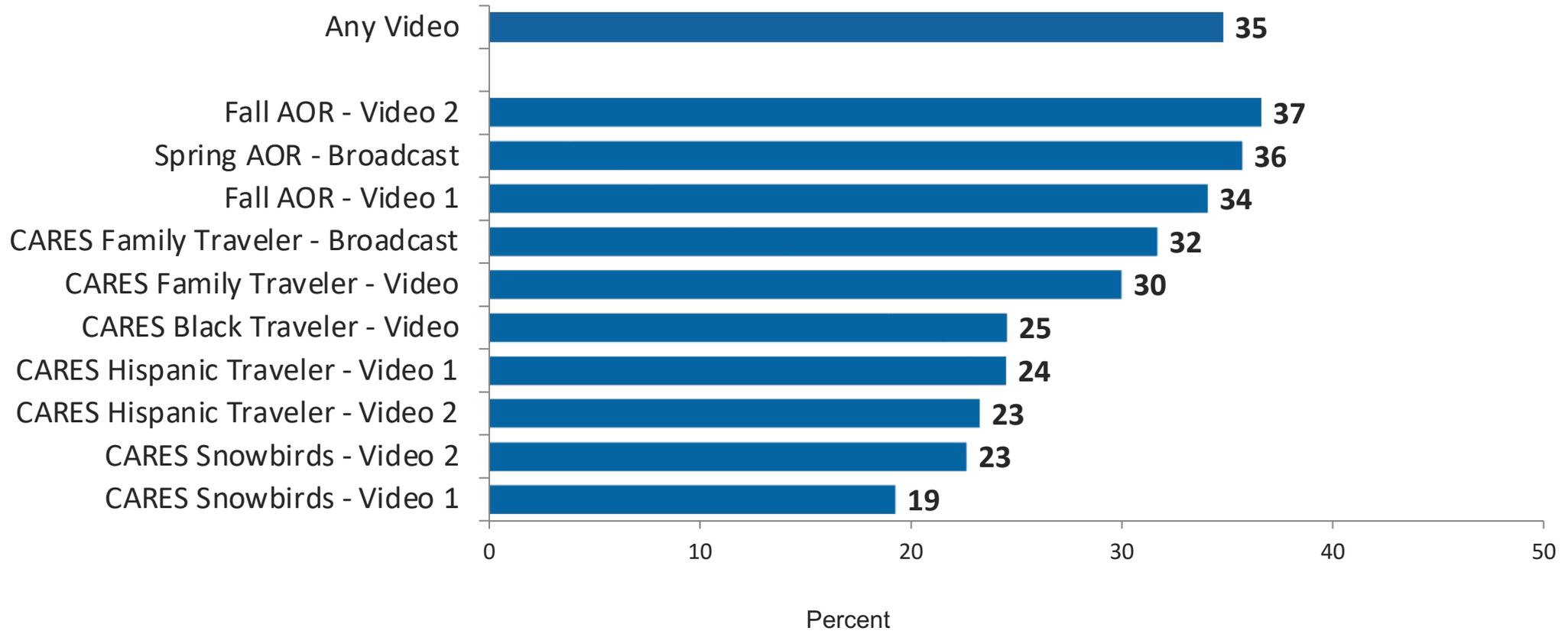
Advertising Awareness* by Campaign

Base: Based on markets where shown



Awareness of Individual Ads - Video

Base: Based on markets where shown



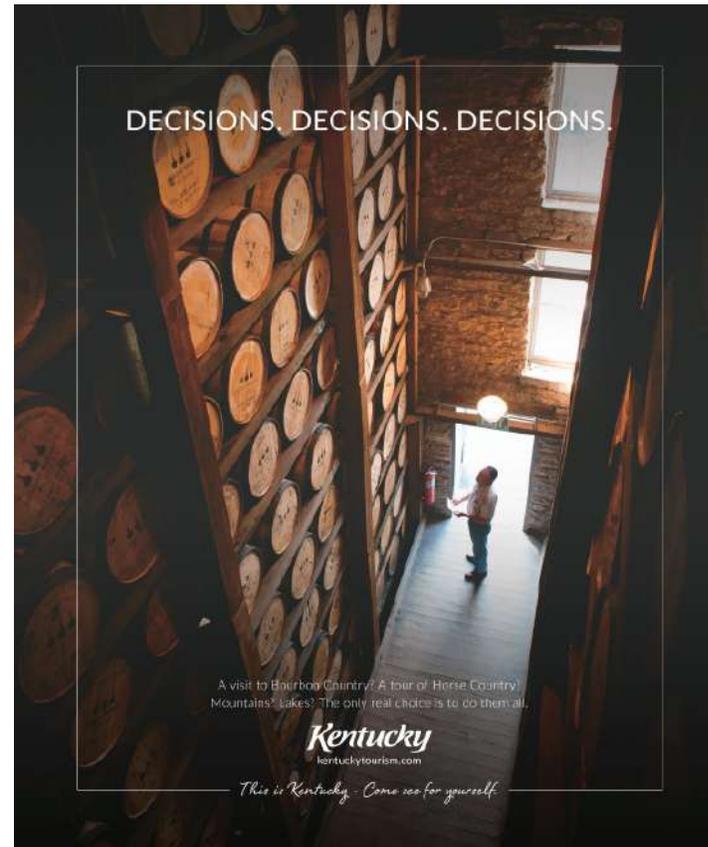
Print Creative



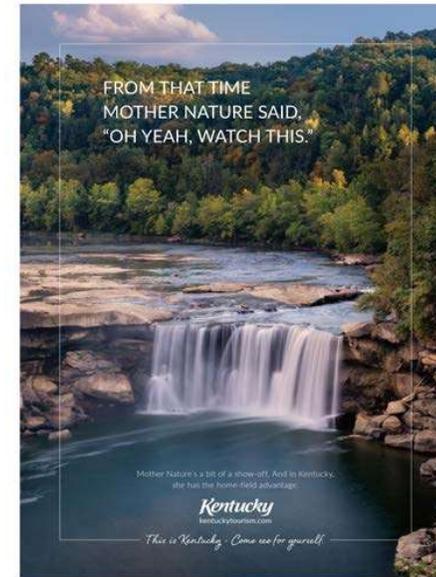
Regional NKR - Print



22 CARES Black Traveler - Print



CARES Family Traveler - Print 1

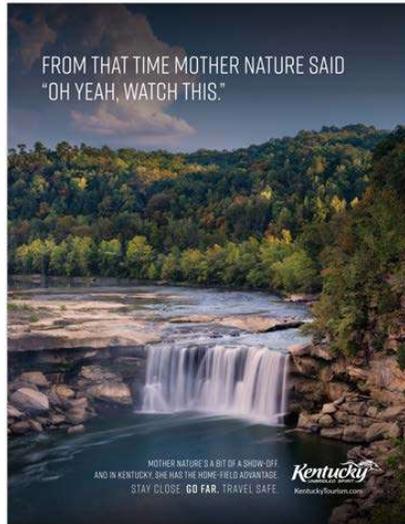


Fall AOR - Print 2

Print Creative (Cont'd)



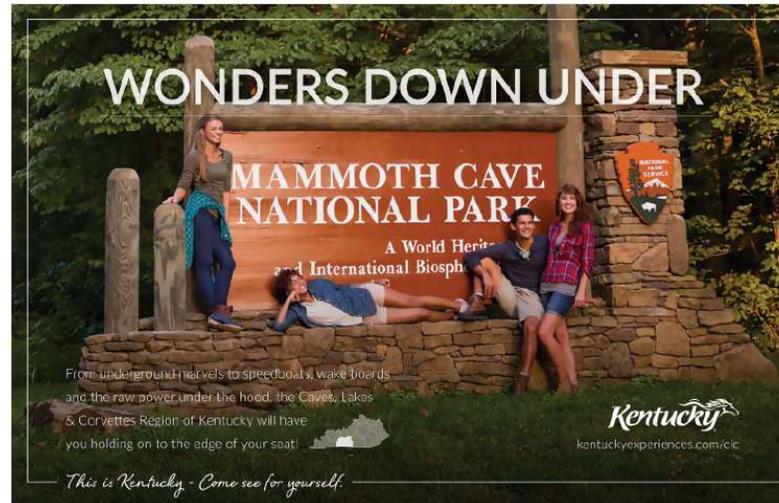
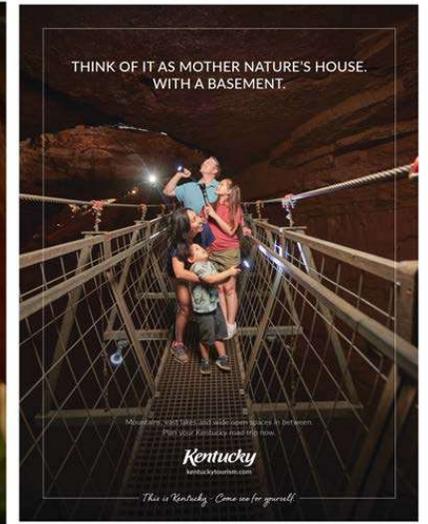
CARES Family Traveler - Print 2



Spring AOR - Print 1



Fall AOR - Print 1

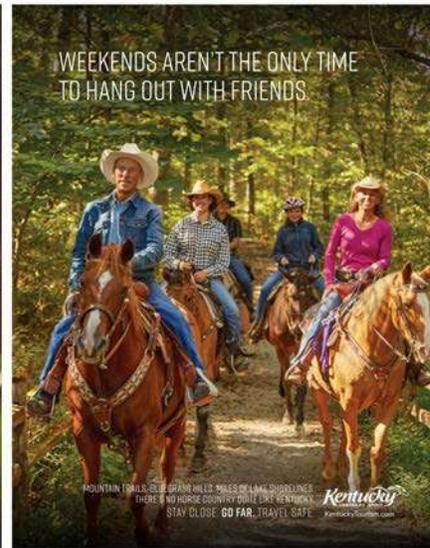


Regional CLC - Print

Print Creative (Cont'd)



Regional BHBB - Print



Spring AOR - Print 2



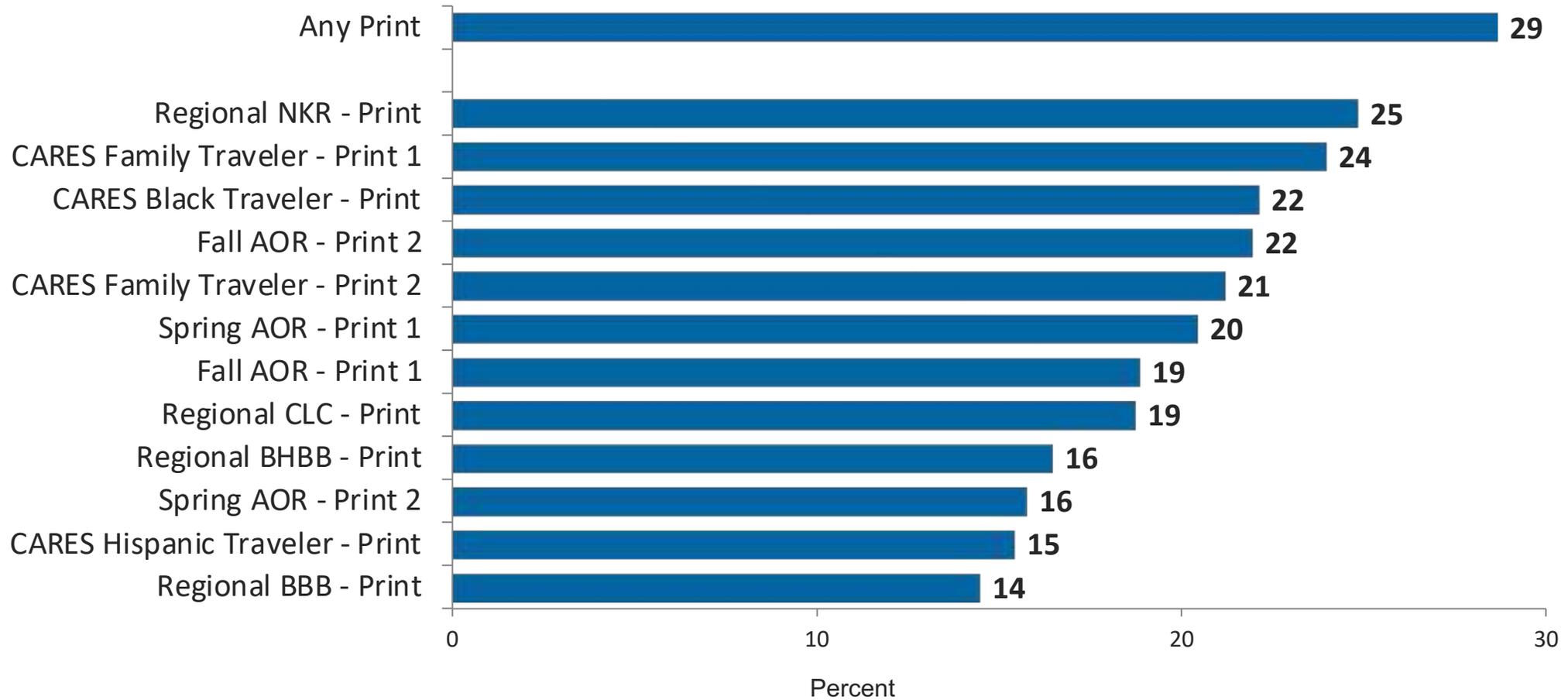
Regional BBB - Print



CARES Hispanic Traveler - Print

Awareness of Individual Ads - Print

Base: Based on markets where shown



Banner Creative



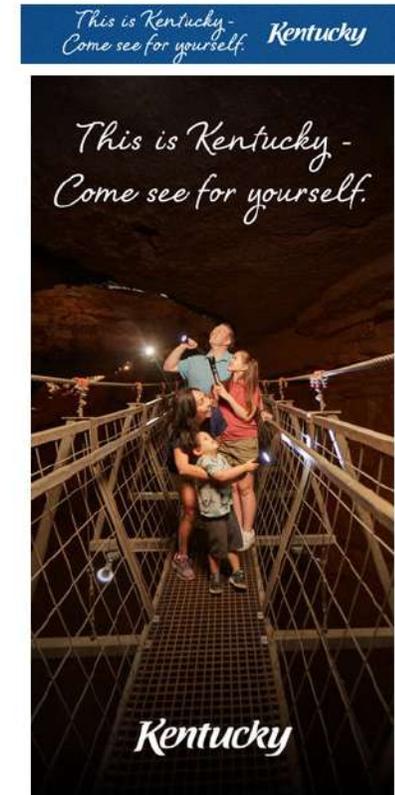
Regional BHBB - Digital



Regional CLC - Digital



Regional DBC - Digital



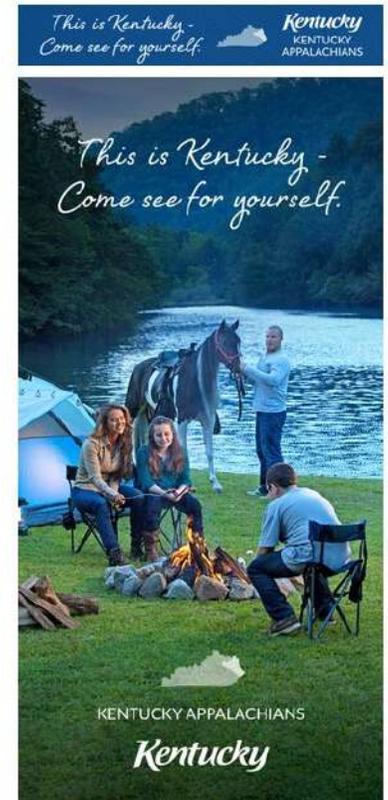
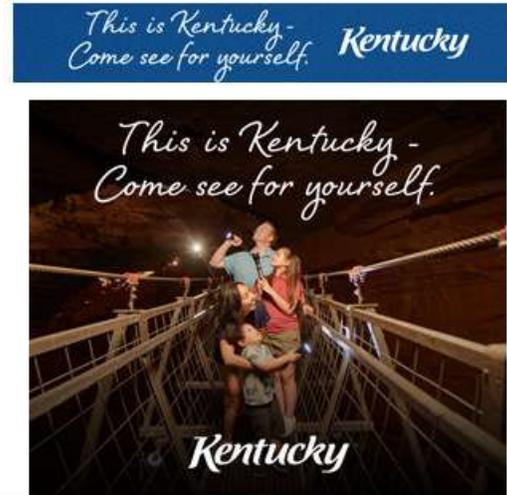
CARES Family Traveler - Digital



Banner Creative (Cont'd)



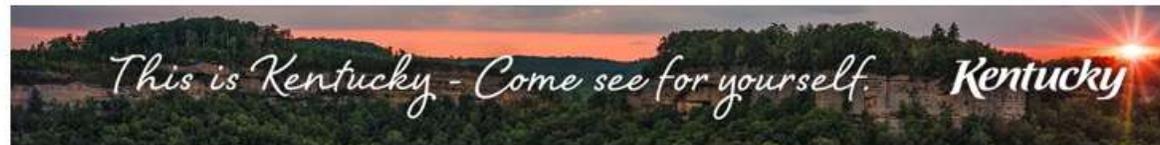
Regional BBB - Digital



Regional KA - Digital



CARES Black Traveler - Digital



Fall AOR - Digital



Banner Creative (Cont'd)



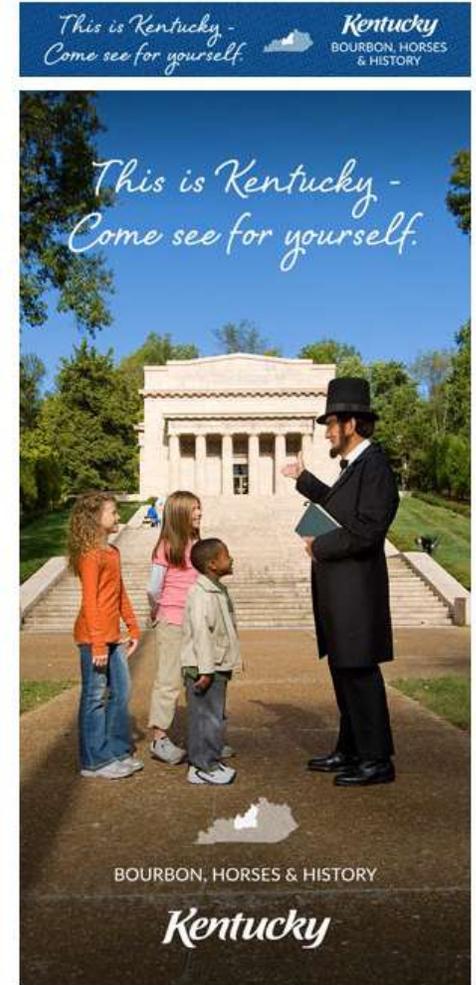
Regional NKR - Digital



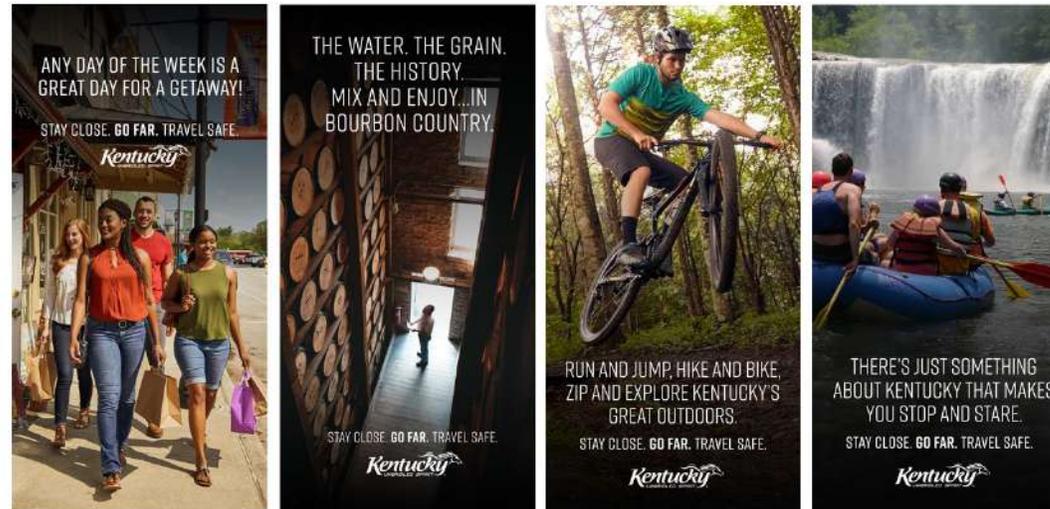
Spring AOR Digital compilation 2



Regional WW - Digital

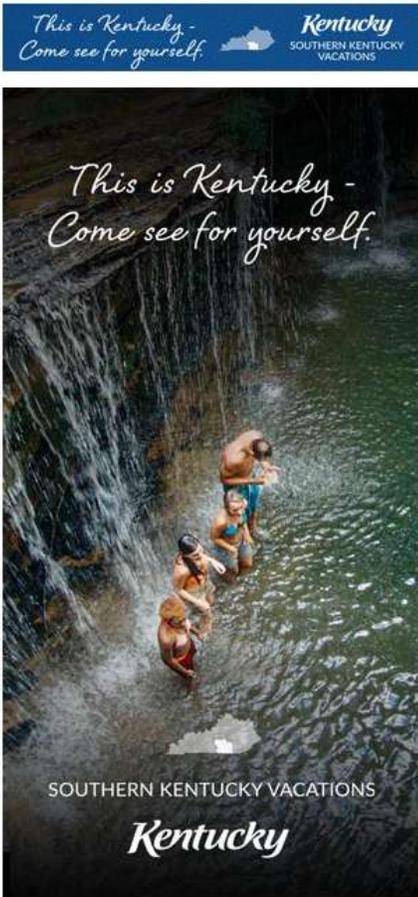


Regional BHH - Digital
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Spring AOR Digital compilation 1

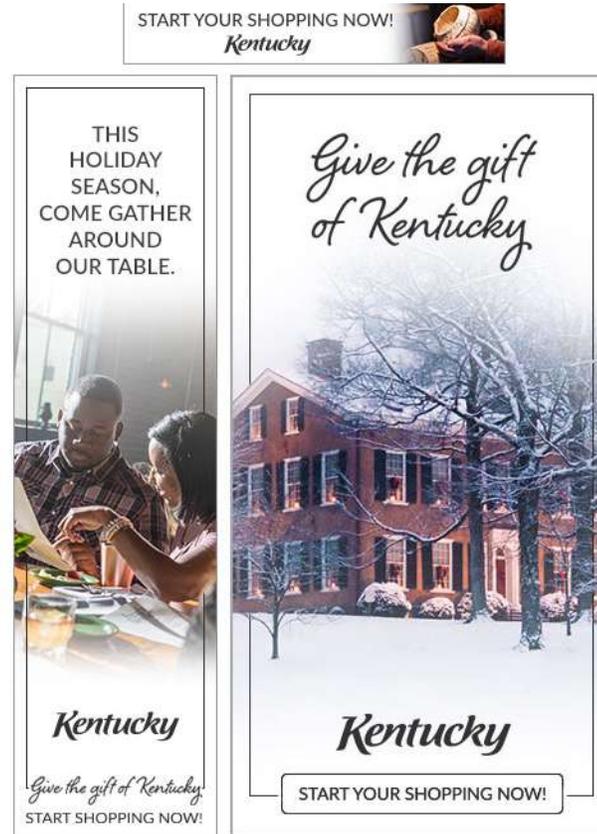
Banner Creative (Cont'd)



Regional SKV - Digital



CARES Hispanic Traveler - Digital

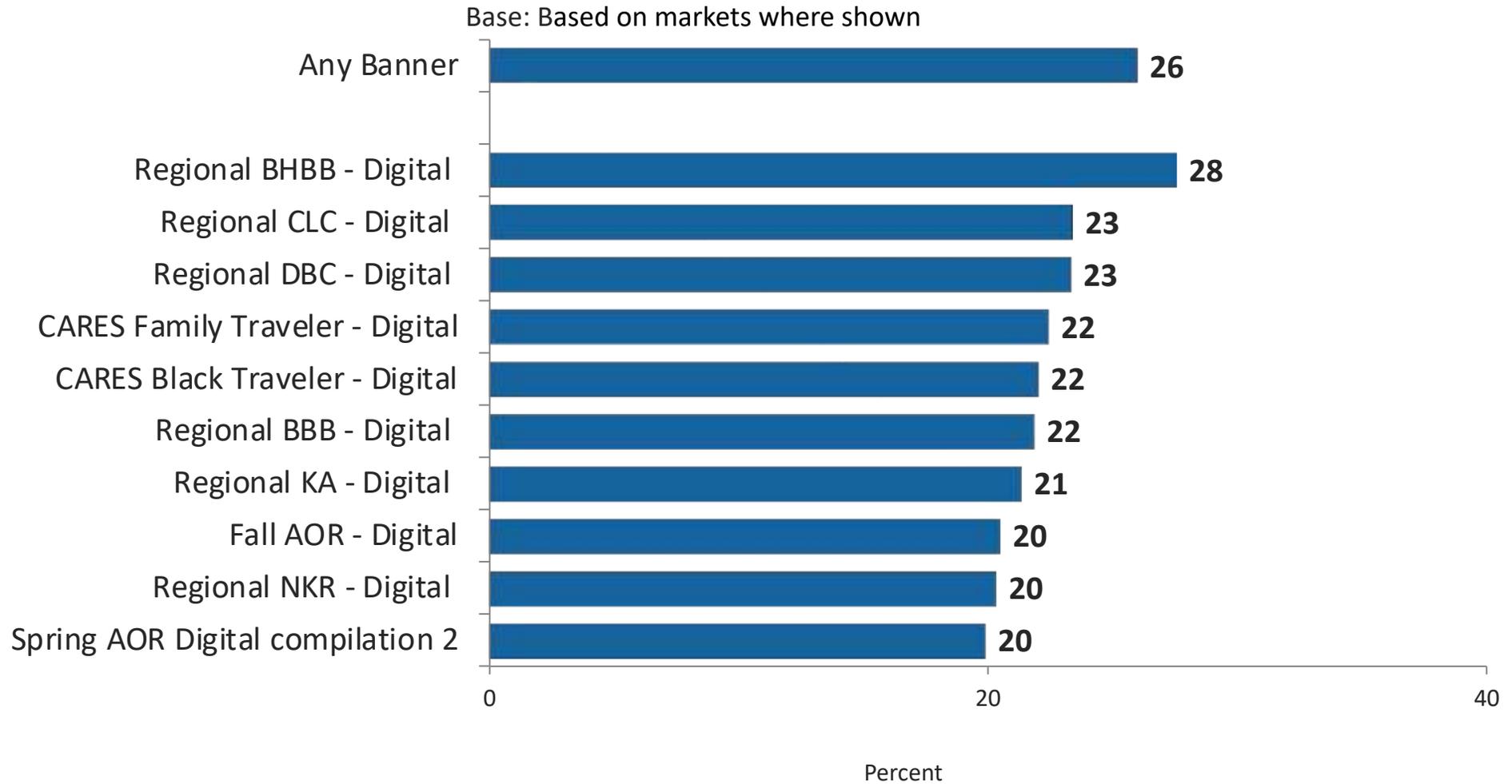


Holiday AOR - Digital

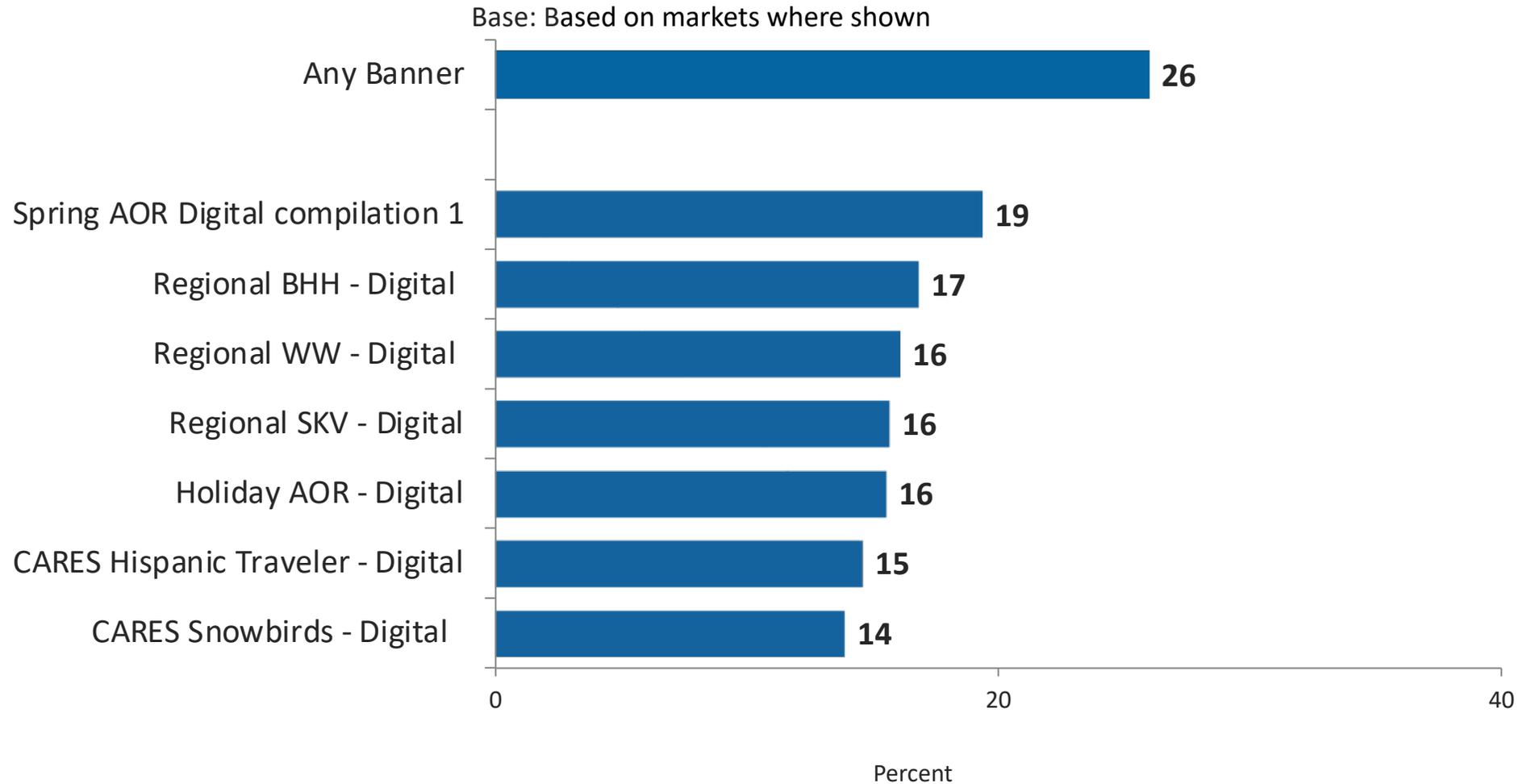


CARES Snowbirds - Digital
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Awareness of Individual Ads - Banner

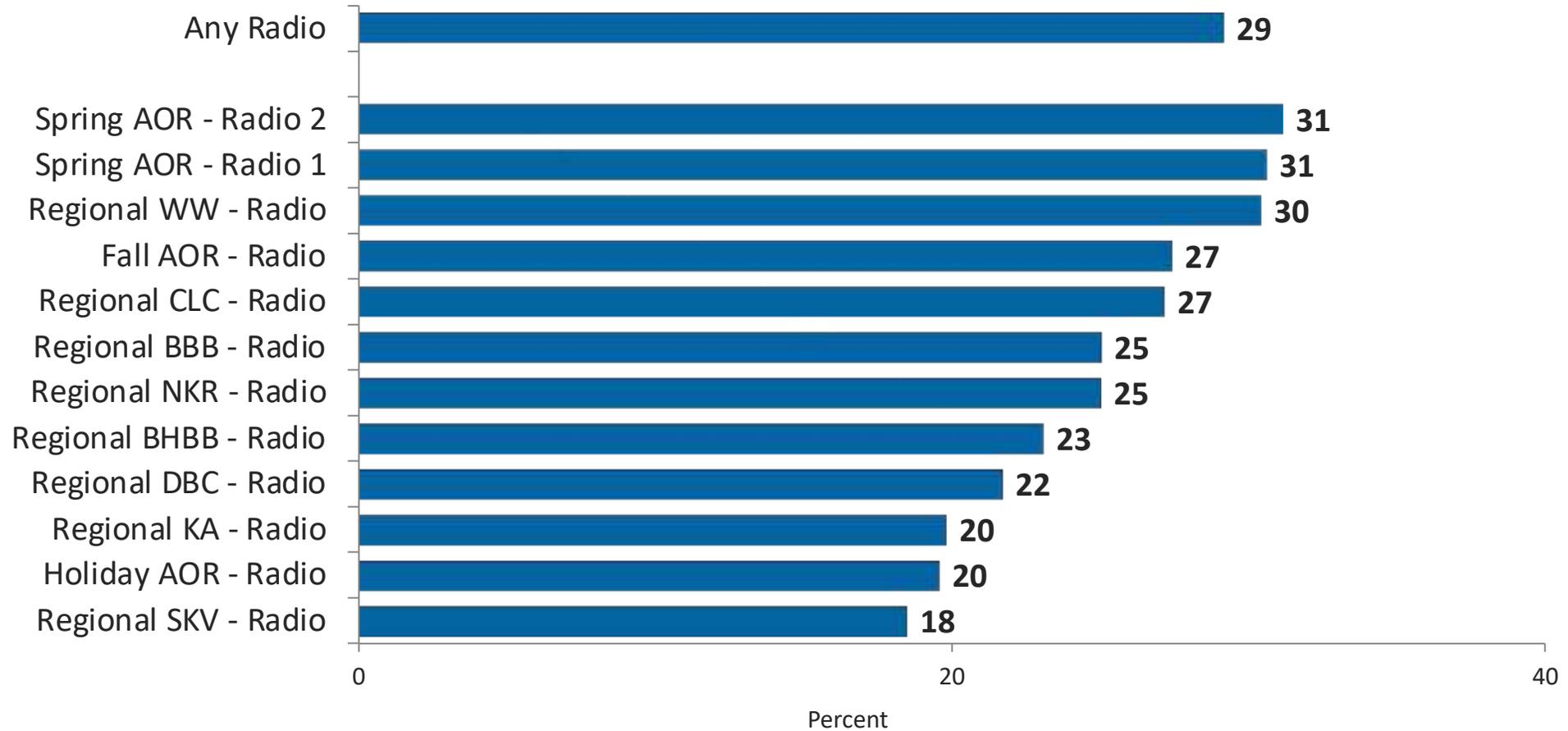


Awareness of Individual Ads - Banner (Cont'd)



Awareness of Individual Ads - Radio

Base: Based on markets where shown



Social Creative

 **Kentucky Tourism**
Sponsored · 

That time when Mother Nature said, "Oh yeah, watch this." Stay Close. Go Far. Travel Safe.



KENTUCKYTOURISM.COM
Paddle to the "Niagara of the South." [LEARN MORE](#)

 **Kentucky Tourism**
Sponsored · 

There's just something about the water ... and it's even more captivating in Kentucky. Stay Close. Go Far. Travel Safe.



Enjoy epic outdoor... [LEARN MORE](#)
Plan your getaway!

Paddle to "Niagara"
Plan your

 **Kentucky Tourism**
Sponsored · 

Run and jump, hike and bike, zip and explore Kentucky's great outdoors! Stay Close. Go Far. Travel Safe.

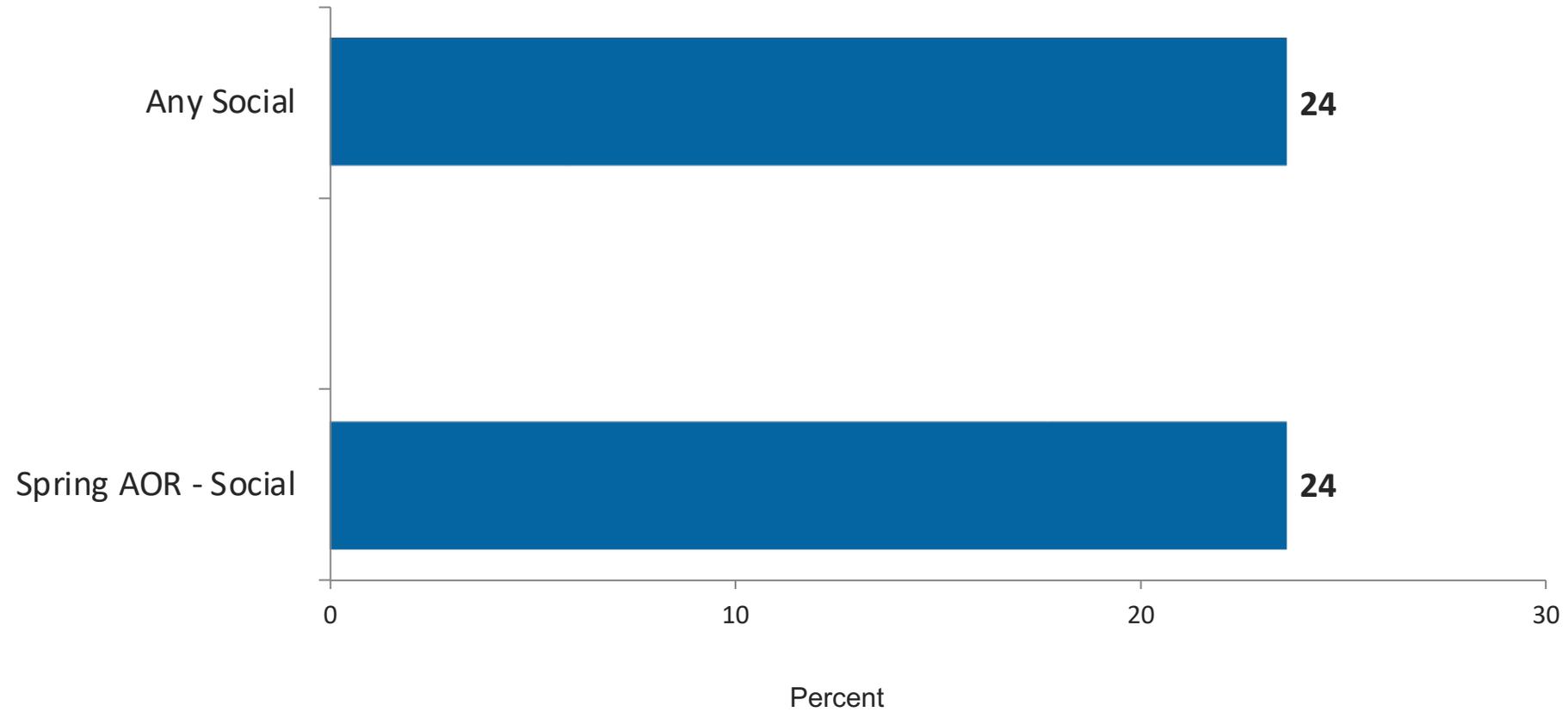


KENTUCKYTOURISM.COM
Discover a hidden waterfall. [LEARN MORE](#)
Plan your Kentucky getaway!

Spring AOR - Social

Awareness of Individual Ads - Social

Base: Based on markets where shown



Out-of-Home Creative

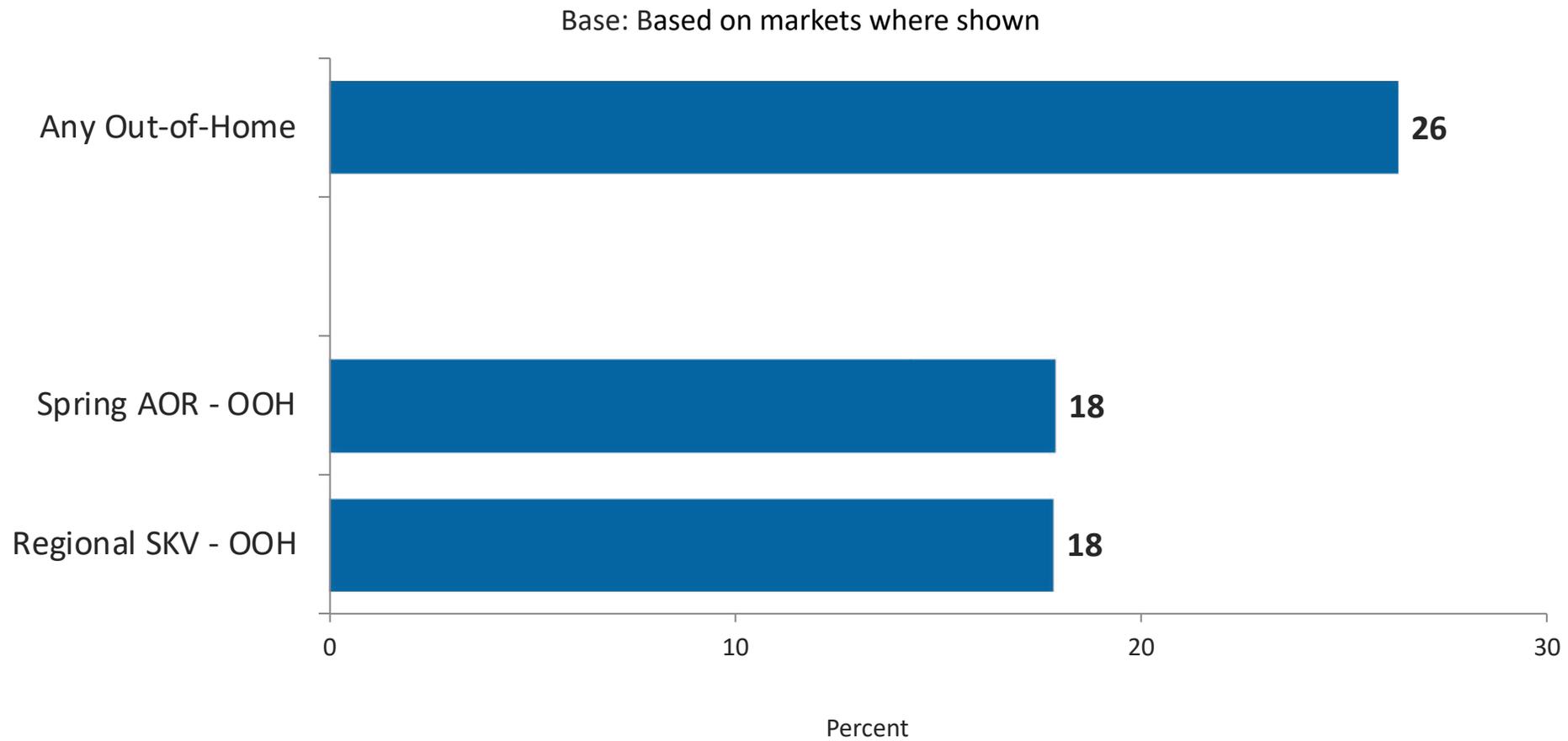


Spring AOR - OOH



Regional SKV - OOH

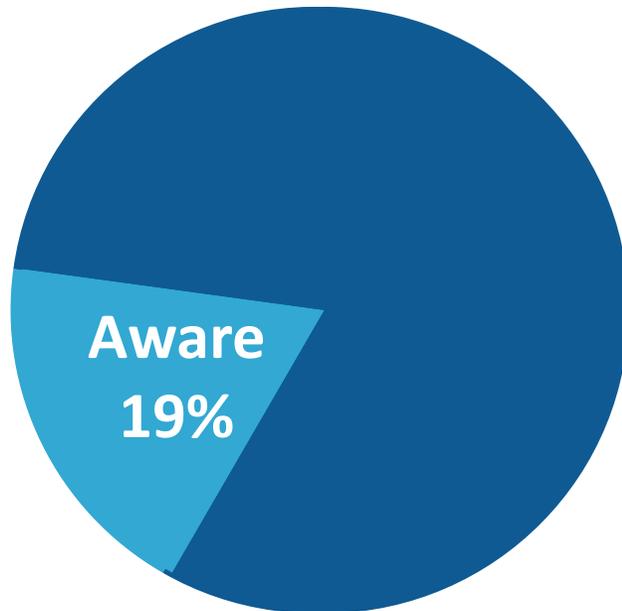
Awareness of Individual Ads - Out-of-Home



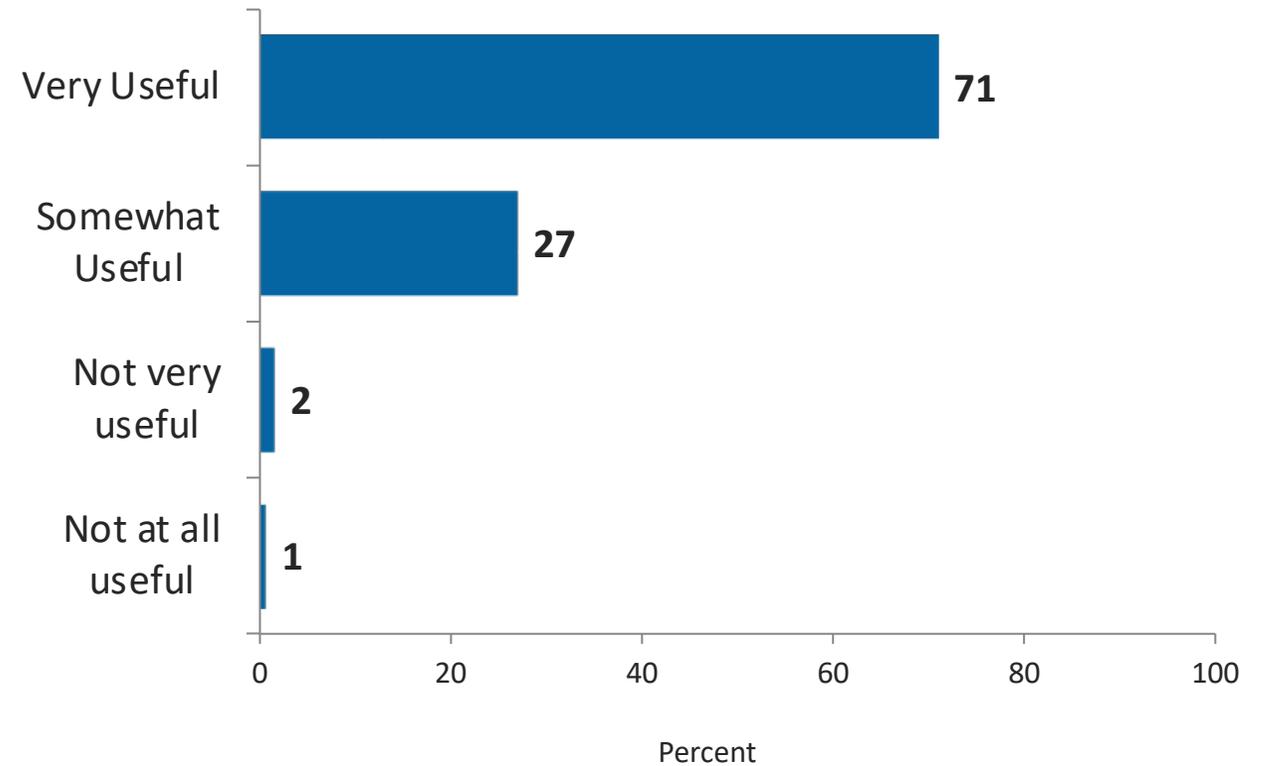
Kentucky Tourism Website

Base: Total

Awareness of Website

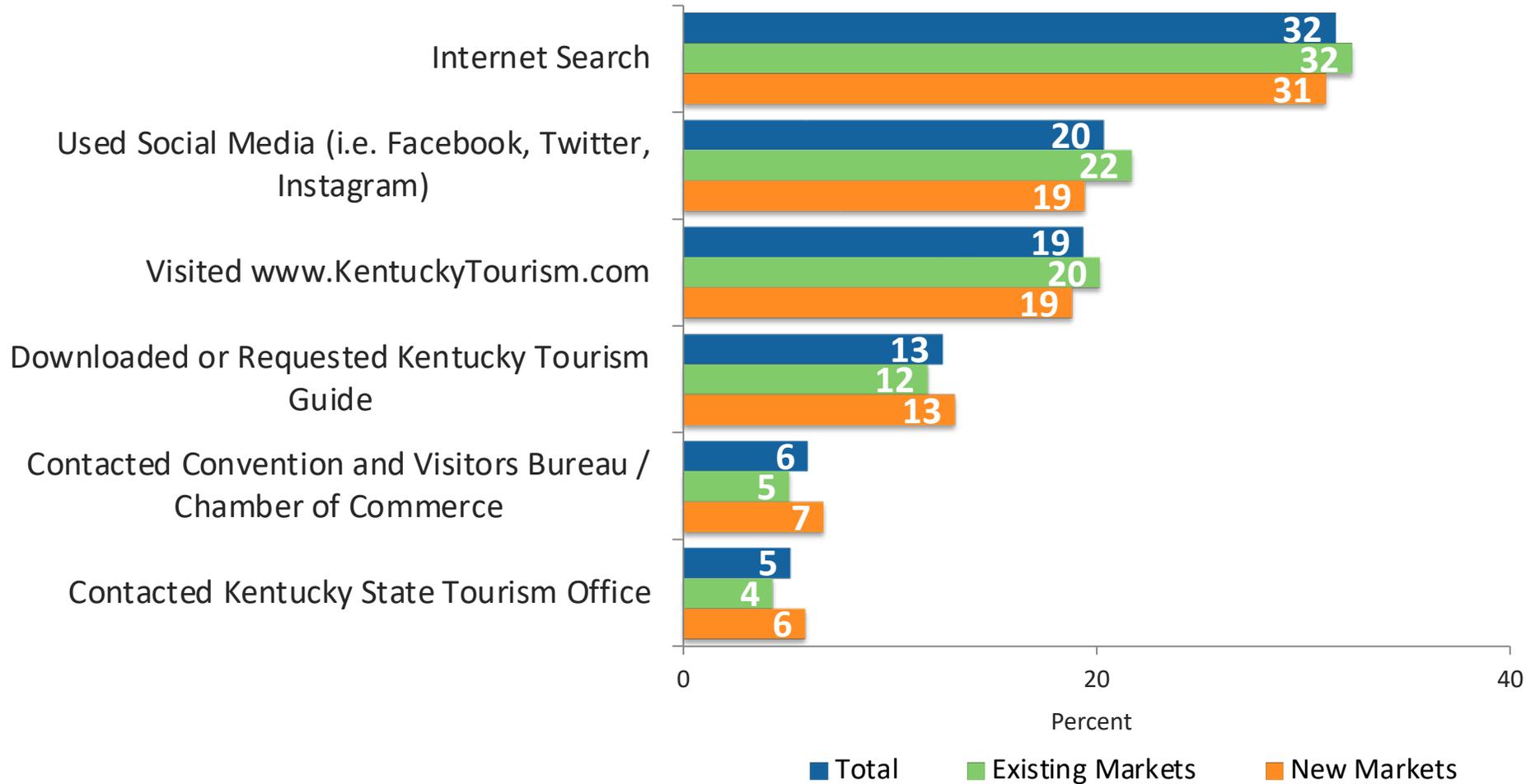


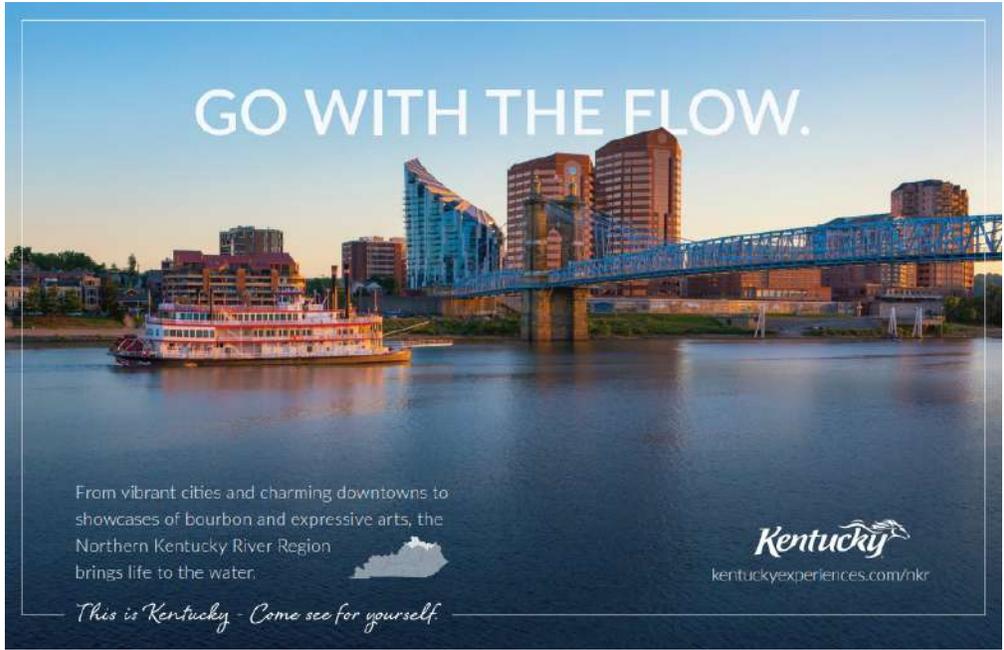
How useful was the Kentucky Tourism website?



Actions Taken to Obtain Information about Traveling to Kentucky

Base: Residents of Kentucky's Advertising Markets





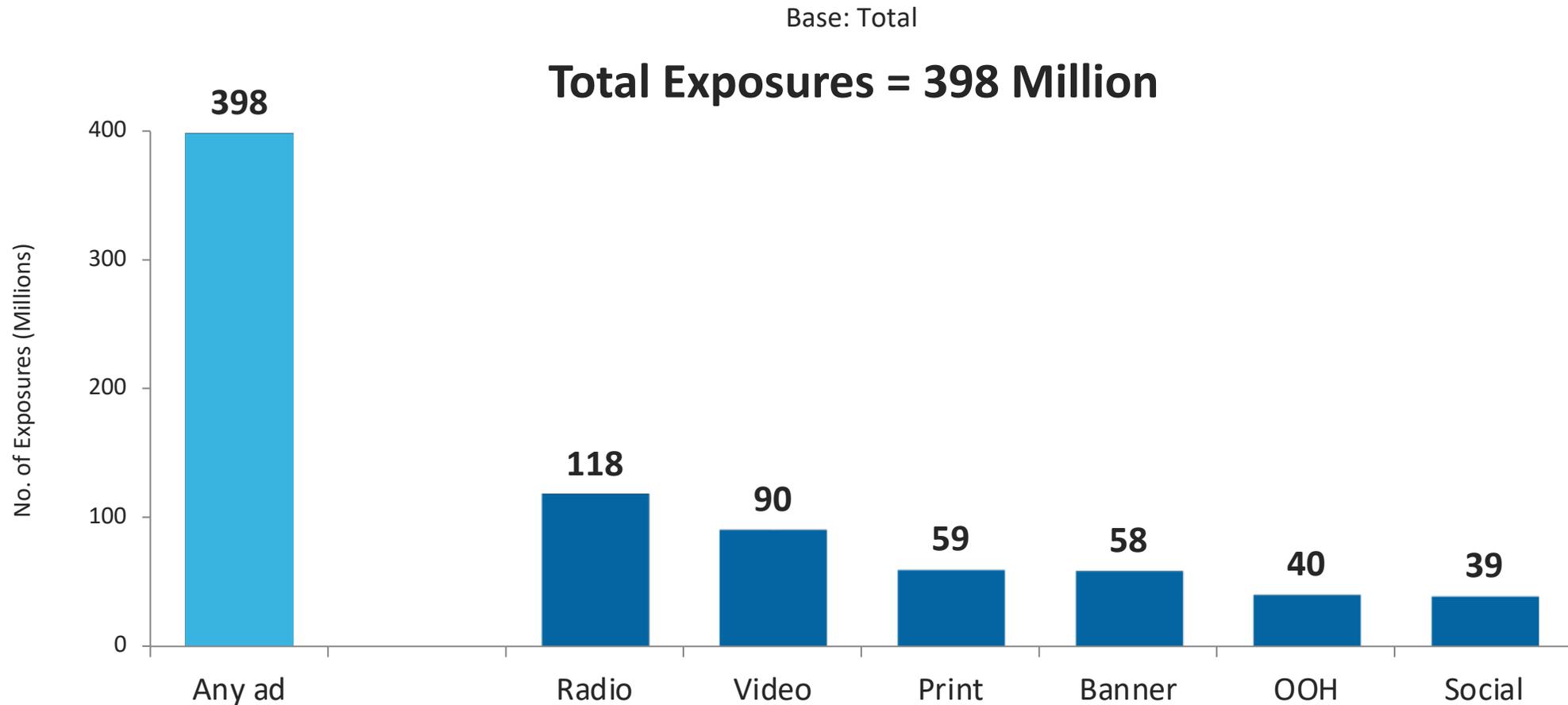
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Media Diagnostics

Media Diagnostics

- In the markets included in this study, there were an estimated 398 million ad exposures over the campaign period.
- Radio ads (118 million exposures) showing highest frequency of recall, followed by video (90 million exposures), print (59 million exposures), and banner ads (58 million exposures).
- When we relate the number of ad exposures recalled to the specific amount of money spent on the ads by medium, we see that:
 - OOH ads constituted the most efficient medium in terms of generating recall per dollar spent, at \$2 per thousand of exposures recalled.
 - Radio (\$10 per thousand of exposures recalled), social media (\$12 per thousand of exposures recalled), and print (\$13 per thousand of exposures recalled) were the second-most effective media, followed by video (\$21 per thousand of exposures recalled).
 - Banners were the least efficient at generating recall (\$65 per thousand exposures recalled).

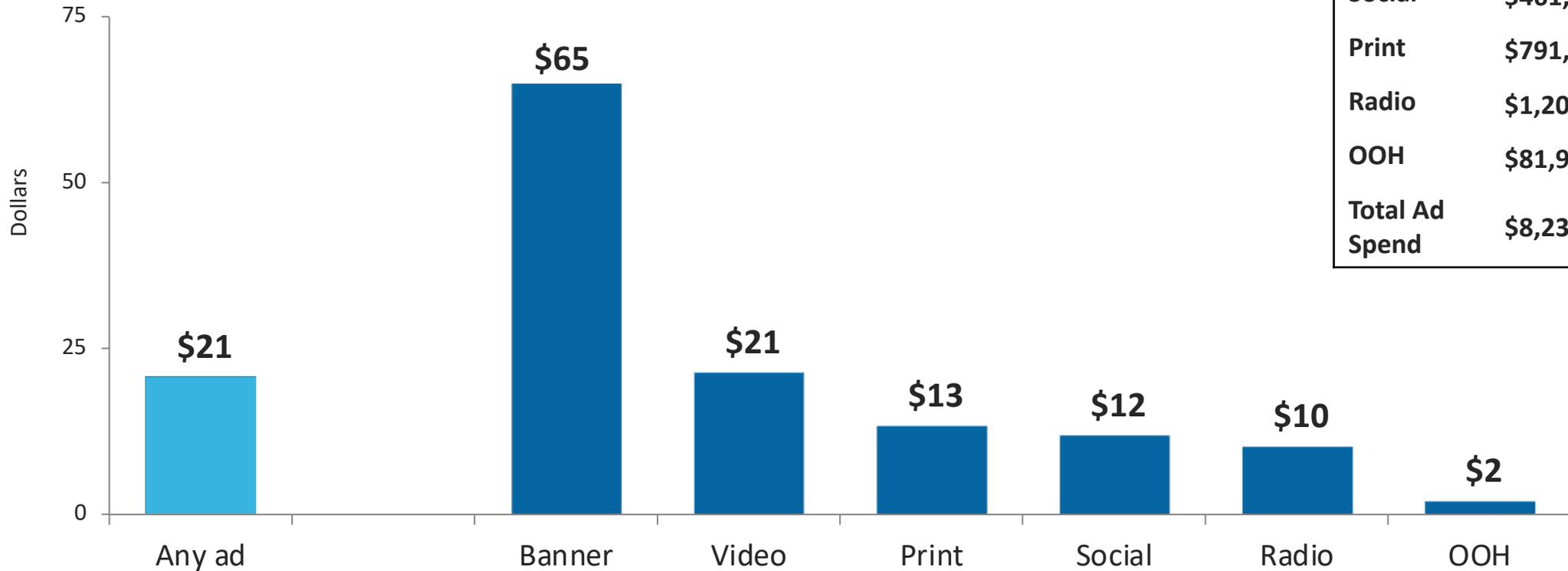
Total Exposures Recalled by Medium



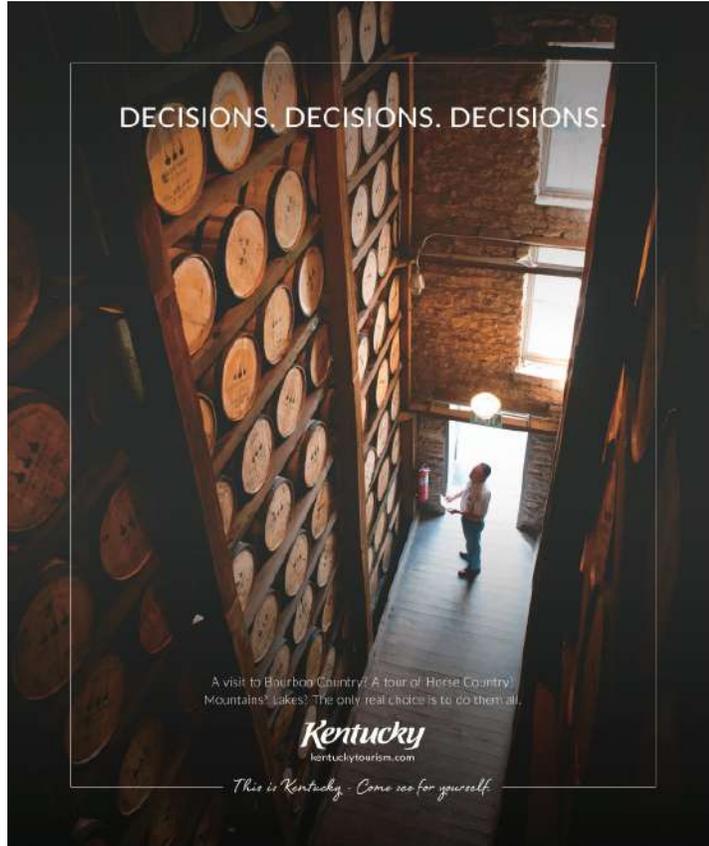
Cost per Thousand Exposures Recalled – by Medium

Base: Total

Total Exposures = 398 Million



	Total
Banner	\$3,769,317
Video	\$1,928,137
Social	\$461,169
Print	\$791,880
Radio	\$1,206,300
OOH	\$81,900
Total Ad Spend	\$8,238,703



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Short Term Conversion

Short-Term Conversion

- The campaigns included in this study produced an additional 4.1 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising.
 - 2.7 million of those incremental trips were from existing markets, and 1.4 million from new markets.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$542.4 million on those trips.
 - When related to advertising costs of \$8.2 million, this translates into a return on investment of \$66 in visitor spending for each ad dollar spent.
 - \$314.1 million of that incremental spending came from existing markets, and when related to advertising costs of \$6 million, results in a spending ROI of \$53 for every advertising dollar spent.
 - \$228.3 million of that incremental spending came from new markets, and when related to advertising costs of \$2.3 million, results in a spending ROI of \$101 for every advertising dollar spent.
- The total market spending ROI of \$66 is the best result in the four years Kentucky has conducted this survey with Longwoods.

Short-Term Conversion (Cont'd)

- Looking at total markets, KDT spent \$2.00 for every incremental trip taken. This is Kentucky's best result in this metric since 2018's \$1.86.
 - The price per trip in existing markets was \$2.23 and \$1.58 in new markets.
- Those incremental expenditures in total advertising markets yielded \$43.1 million in state and county taxes. There was a return on investment of \$5 in taxes for each ad dollar spent.
 - For existing markets, there was \$25 million in incremental state and local taxes, and a tax ROI of \$4.
 - For new markets, there was \$18.1 million in incremental state and local taxes, and a tax ROI of \$8.

Short-Term Incremental Trips, Spending and Taxes Due to Advertising

**Ad Investment
\$8.2M**



4.1M

**Incremental
Trips**

\$542.4M

**Incremental Visitor
Spending**

\$43.1M*

**Incremental
State + Local Taxes**

*Effective Direct Tax rate 8% (from Tourism Economics)

Short-Term Incremental Trips, Spending and Taxes Due to Advertising

	Existing Markets	New Markets	Total
Ad Investment	\$ 6.0M	\$2.3M	\$8.2M
Incremental Trips	2.7M	1.4M	4.1M
Incremental Visitor Spending	\$ 314.1M	\$228.3M	\$542.4M
Incremental State + Local Taxes*	\$ 25.0M	\$18.1M	\$43.1M

- Effective Direct Tax rate 8% (from Tourism Economics)

Campaign Efficiency

	Existing Markets	New Markets	Total
Ad \$'s per Trip	\$2.23	\$1.58	\$2.00
Trips per Ad \$	0.45	0.63	0.50

Campaign Efficiency

	2018	2019	2020*	2021**
Ad \$'s per Trip	\$ 1.86	\$3.06	\$8.81	\$2.00
Trips per Ad \$	0.54	0.33	0.11	0.50

*In-State Only

** Includes Existing & New Markets

The Bottom Line in 2021



Every \$1 invested in the 2021 Kentucky advertising campaign generated \$66 in direct visitor spending and \$5 in taxes in the state

The Bottom Line in 2021

	Existing Markets	New Markets	Total
Spending ROI	\$53	\$101	\$66
Tax ROI	\$4	\$8	\$5

The Bottom Line

	2018	2019	2020*	2021**
Spending ROI	\$60	\$39	\$10	\$66
Tax ROI	\$5	\$3	\$1	\$5

*In-State Only

** Includes Existing & New Markets



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Main Findings: Kentucky's Overall Position in the Target Market



Destination Hot Buttons

Travel Motivators – Total Markets

- Respondents evaluated the image of Kentucky and six other destinations on an overall basis and on a series of additional detailed image attributes.
- To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:
 - For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.
- Then, in order to better communicate the results, the data were grouped into broader categories or factors.
- For a destination in this competitive set to get on travelers’ consideration list, it must, first and foremost, be perceived to:
 - Be **exciting** – being seen as exciting means being a must-see place to visit, offering a real sense of fun, excitement, and adventure.
 - Be suitable for **adults** and couples – which is logical, since they are paying for the vacation.
 - Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, walkability, parks, museums, etc.

Travel Motivators - Total Markets (Cont'd)

- There are several factors that individually are of moderate importance, but in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - **Uniqueness**, including the scenery, local food, people, and culture.
 - The opportunities for **entertainment**, e.g., fairs, live music, nightlife, theater etc.
 - A great **family atmosphere** – good destination for families that children would enjoy visiting.
 - The availability of **luxurious** accommodations, dining, and spas.
- Lower priorities are:
 - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising for this destination?
 - A safe, welcoming and **worry-free** environment.
 - **Sports and recreation**, including bicycling, hiking, water sports such as swimming and kayaking/rafting, and other outdoor recreation.
 - **Climate**.

Travel Motivators - Total Markets (Cont'd)

- **Affordability** is also relatively unimportant at the wish list stage:
 - But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
 - Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.

Travel Motivators - Existing Markets

- Among travelers in Kentucky's existing markets, for a destination in this competitive set to get on their consideration list, it must, first and foremost, be perceived to:
 - Be *exciting*.
 - Be suitable for **adults** and couples.
 - **Uniqueness**.
- There are several factors that individually are of moderate importance, but in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - A great **family atmosphere**.
 - Great **sightseeing**.
 - The opportunities for **entertainment**.
 - A safe, welcoming and **worry-free** environment.

Travel Motivators - Existing Markets (Cont'd)

- Lower priorities are:
 - **Popularity.**
 - The availability of **luxurious** accommodations, dining, and spas.
 - **Sports and recreation.**
 - **Climate.**
 - **Affordability.**

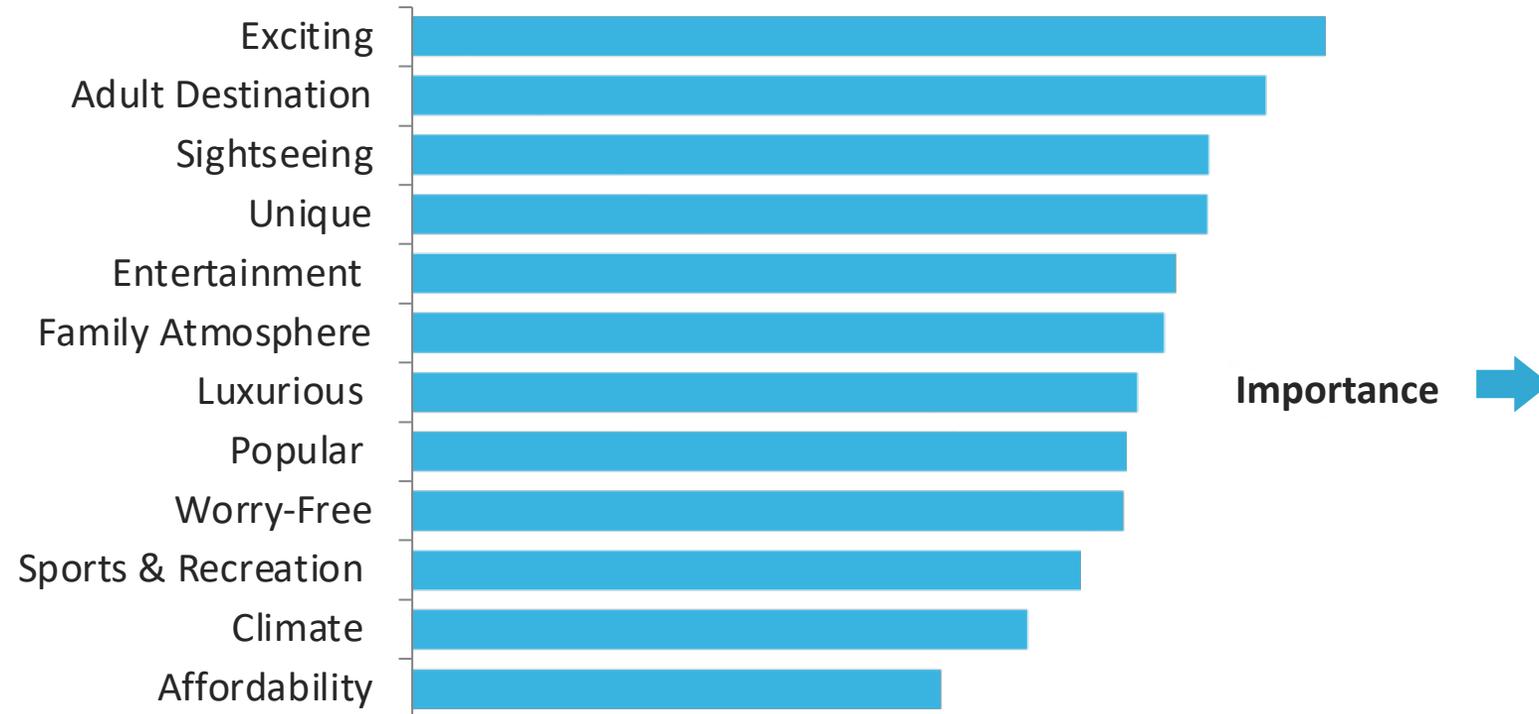
Travel Motivators - New Markets

- Among travelers in Kentucky's new markets, for a destination in this competitive set to get on their consideration list, it must, first and foremost, be perceived to:
 - Be ***exciting***.
 - Be suitable for **adults** and couples.
 - Great **sightseeing**.
- There are several factors that individually are of moderate importance, but in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - **Uniqueness**.
 - The opportunities for **entertainment**.
 - The availability of **luxurious** accommodations, dining, and spas.
 - A great **family atmosphere**.

Travel Motivators - New Markets (Cont'd)

- Lower priorities are:
 - **Popularity.**
 - A safe, welcoming and **worry-free** environment.
 - **Sports and recreation.**
 - **Climate.**
 - **Affordability.**

Travel Motivators – Total Markets



*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

Top 10 Hot Buttons – Total Markets

Hot Buttons

A fun place

Is an interesting place

An exciting place

Must see destination

Lots to see and do

Good for couples

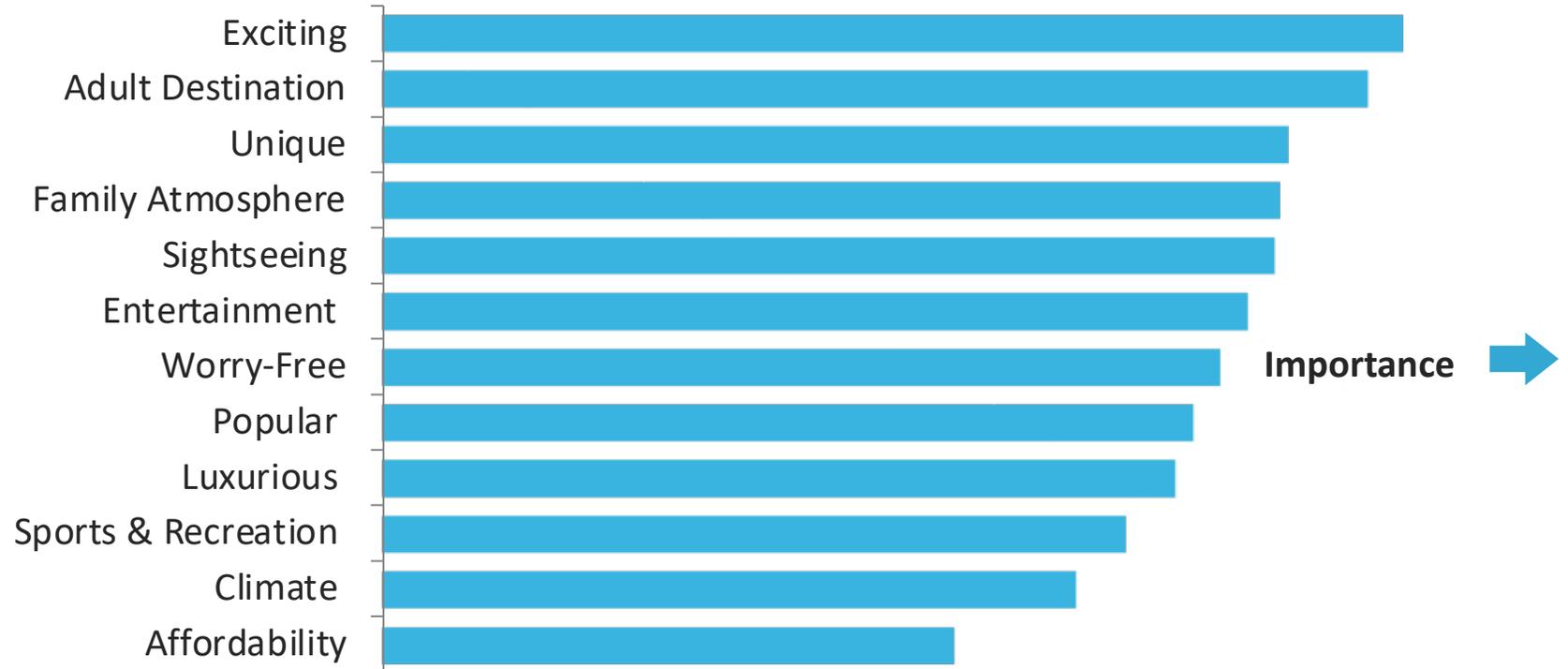
Great for sightseeing

Interesting cities

Interesting local people/cultures

A real adventure

Travel Motivators – Existing Markets



*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

Top 10 Hot Buttons – Existing Markets

Hot Buttons

A fun place

Is an interesting place

An exciting place

Good for couples

Interesting cities

Must see destination

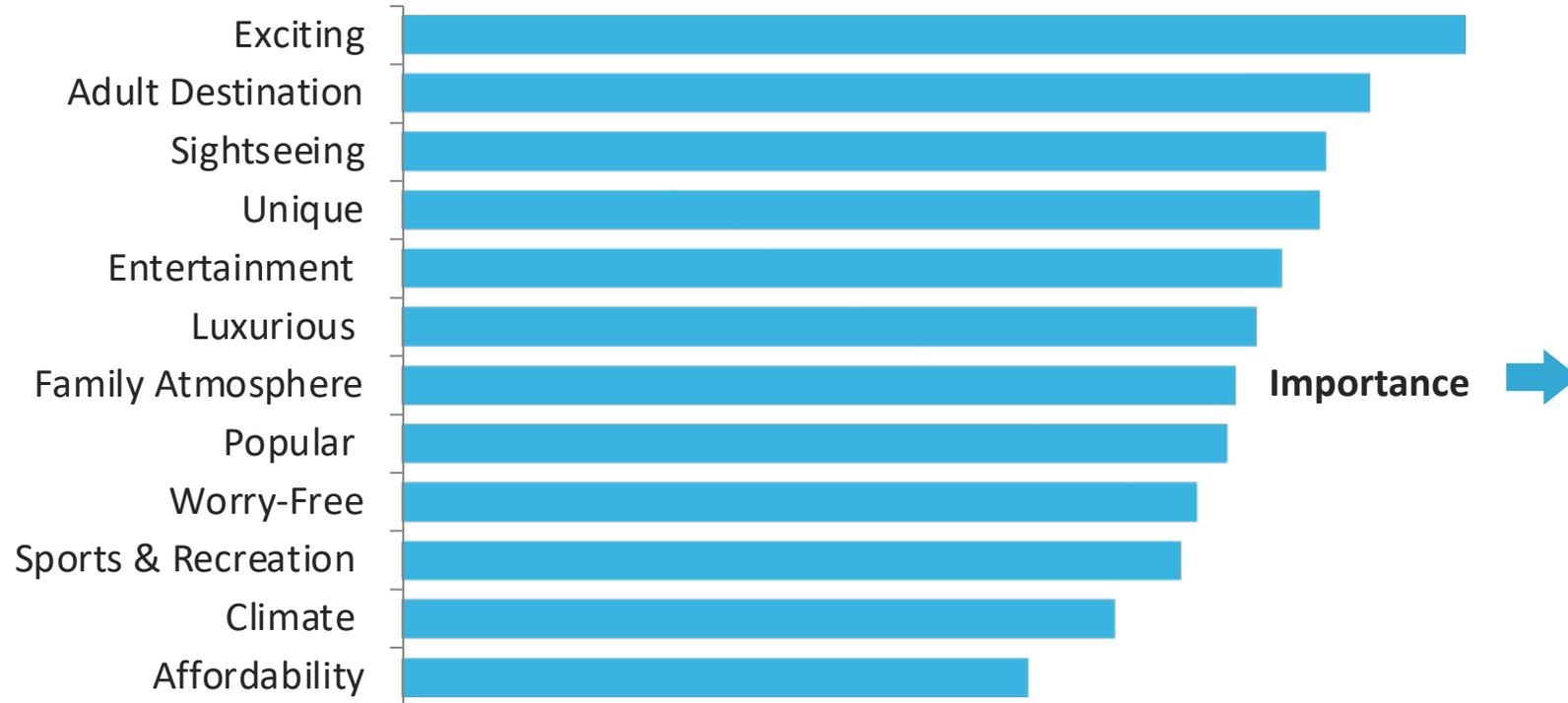
Unique travel experience

Lots to see and do

A place I would feel welcome

Warm, friendly people

Travel Motivators – New Markets



*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

Top 10 Hot Buttons – New Markets

Hot Buttons

A fun place

Is an interesting place

An exciting place

Must see destination

Lots to see and do

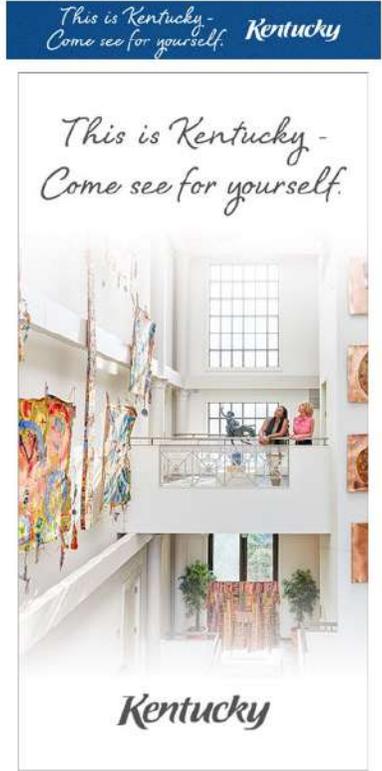
Interesting local people/cultures

Great for sightseeing

A real adventure

First-class hotels/resorts

Good for an adult vacation



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Advertising Impact on Short-of-Sales Measures

Advertising Impacts

- The campaign had a positive impact on travelers' perceptions of Kentucky:
 - Travelers in Kentucky's total advertising markets, as well as the new and existing markets split, exposed to the campaign gave Kentucky higher rating scores than those unfamiliar with the campaign for the general overall statement "Kentucky is a place I would really enjoy visiting" and the notion that a vacation in Kentucky provides "excellent value for the money."
 - For the more detailed attributes, we find that the campaign did a good job of improving people's perceptions of Kentucky for almost every image dimension evaluated.
- For the total advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study, with the following hot buttons showing 20 point or more lift:
 - Must-see destination
 - An exciting place
 - A fun place

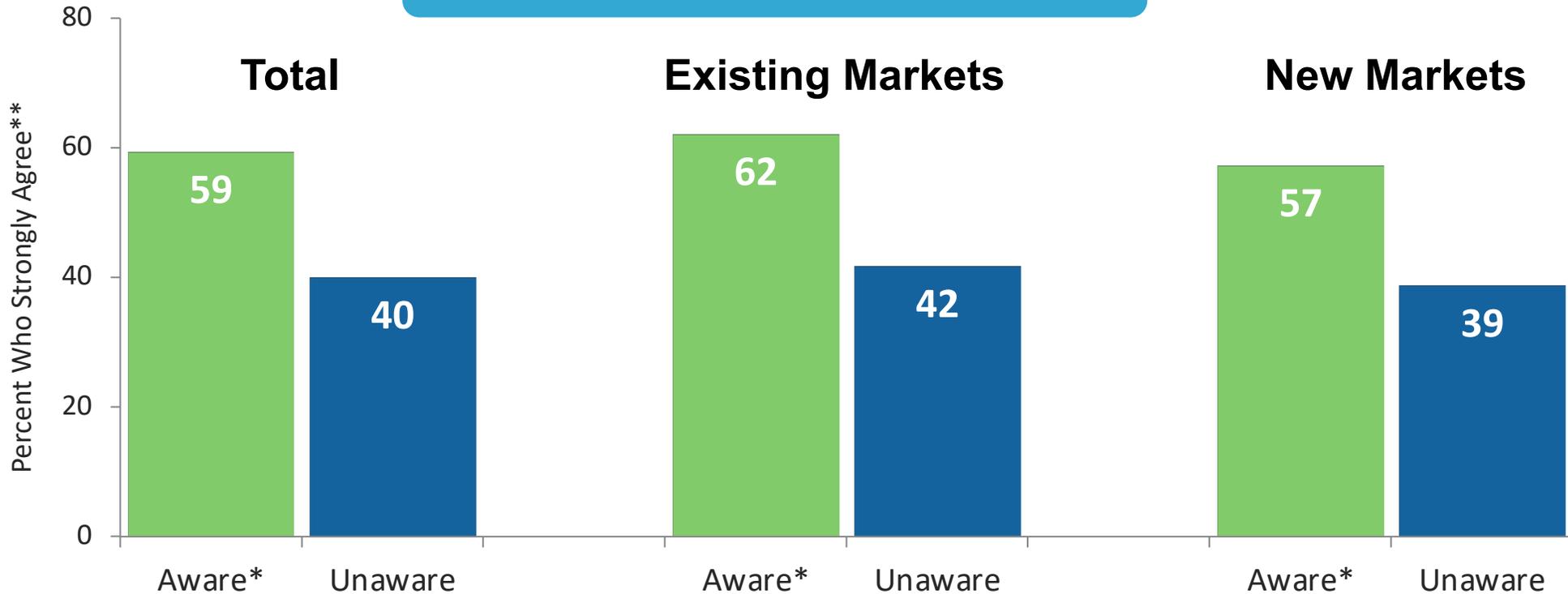
Advertising Impacts (Cont'd)

- For the existing advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study, with the following hot buttons showing a more than 20 point lift:
 - A fun place
 - Must-see destination
- For the new advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study, with the following hot buttons showing a 20+ point lift:
 - Must see destination
 - An exciting place
- There are no variables where significantly more travelers unaware of the advertising rated Kentucky higher than those who were aware of the KDT campaign.

Advertising Impact on Kentucky's Overall Image

Base: Based on markets where shown

“A place I'd really enjoy visiting”



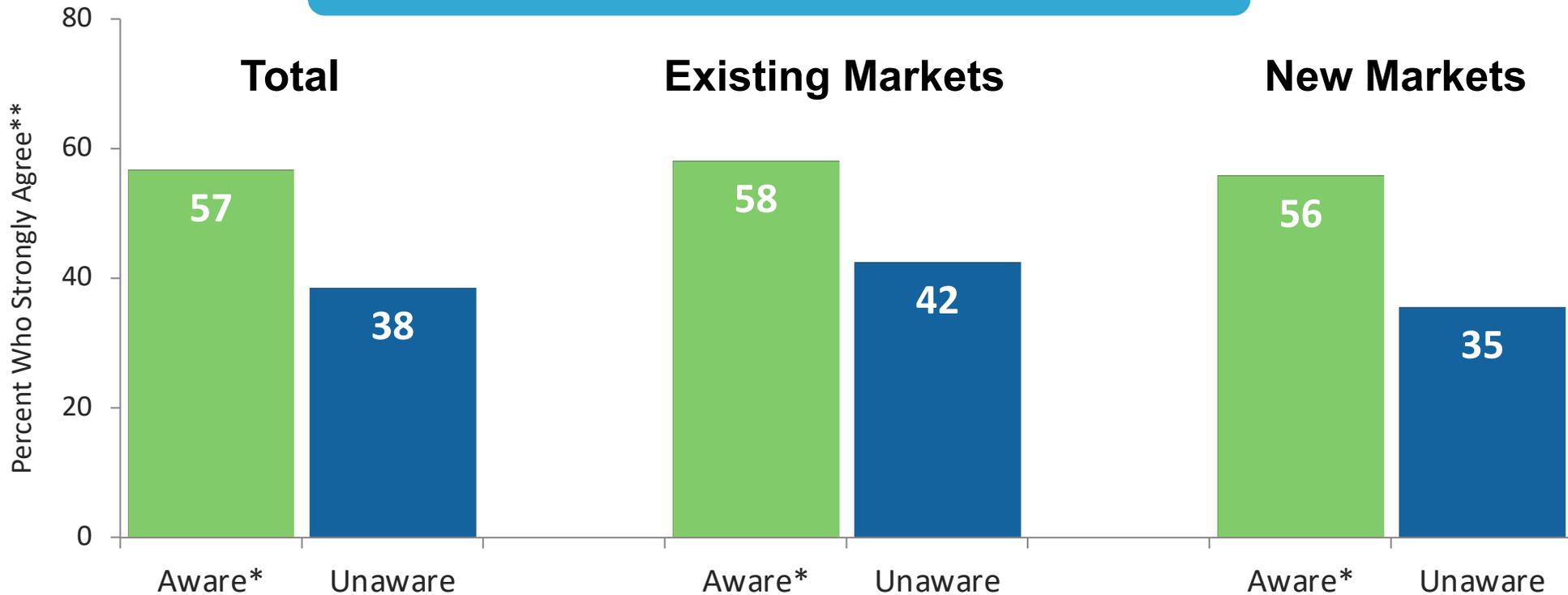
*Saw at least one ad

**“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

Advertising Impact on Kentucky's Overall Image

Base: Based on markets where shown

“Excellent vacation value for the money”



*Saw at least one ad

**“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

Advertising Impact on Kentucky's Image – Total Markets

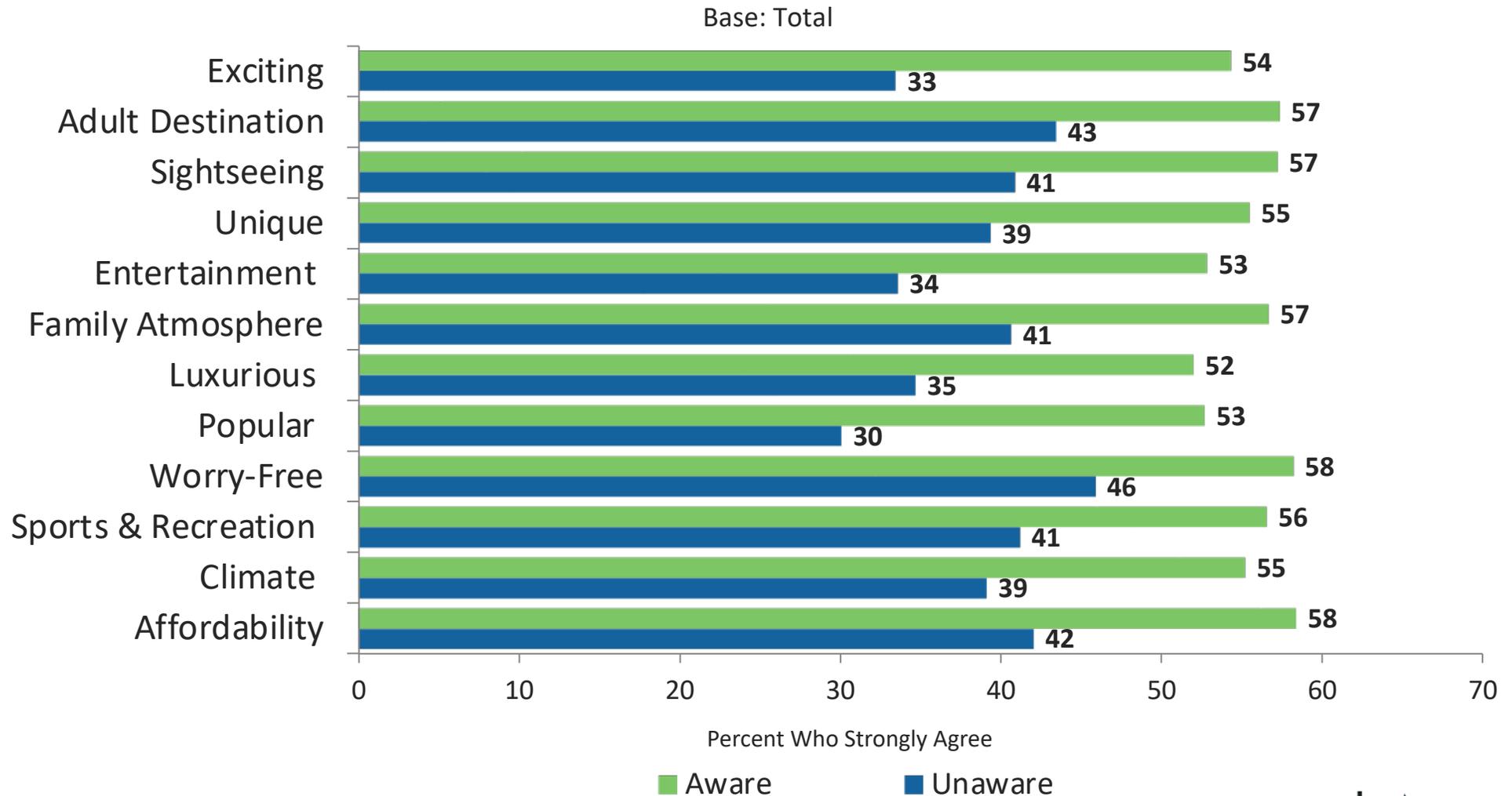
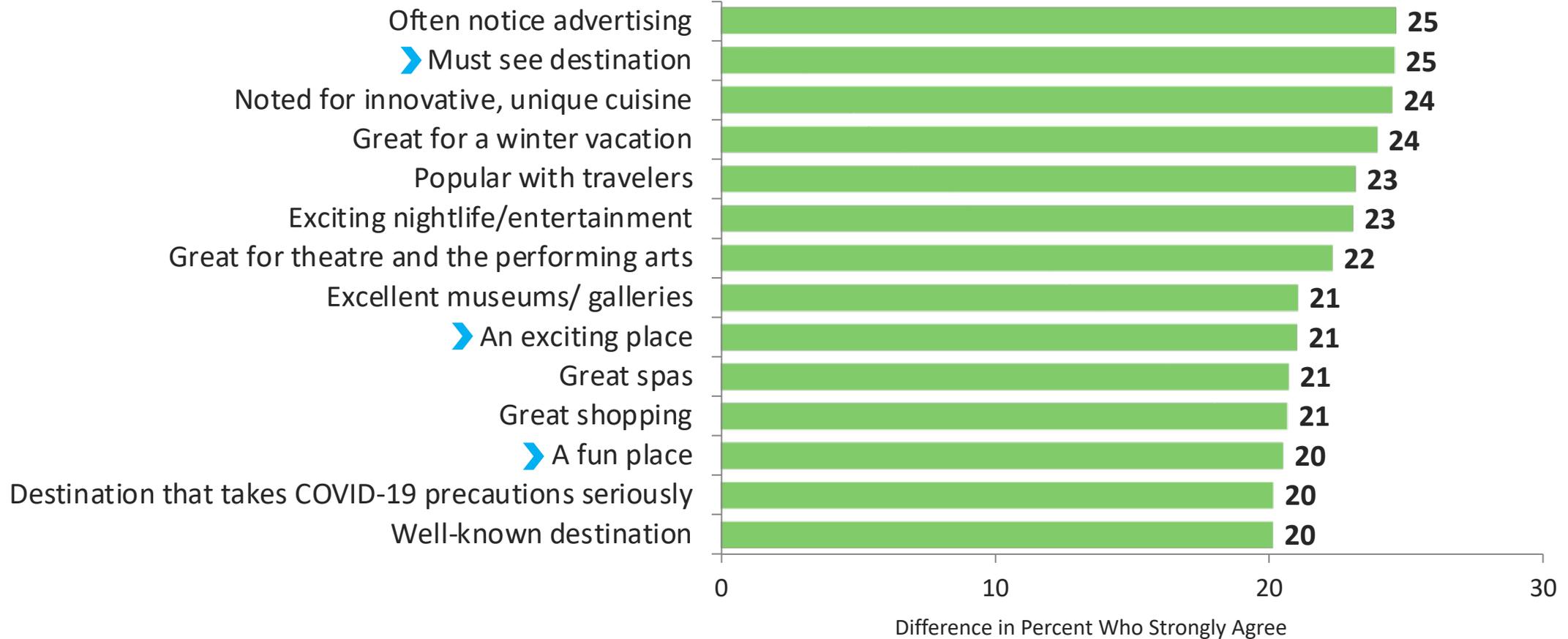


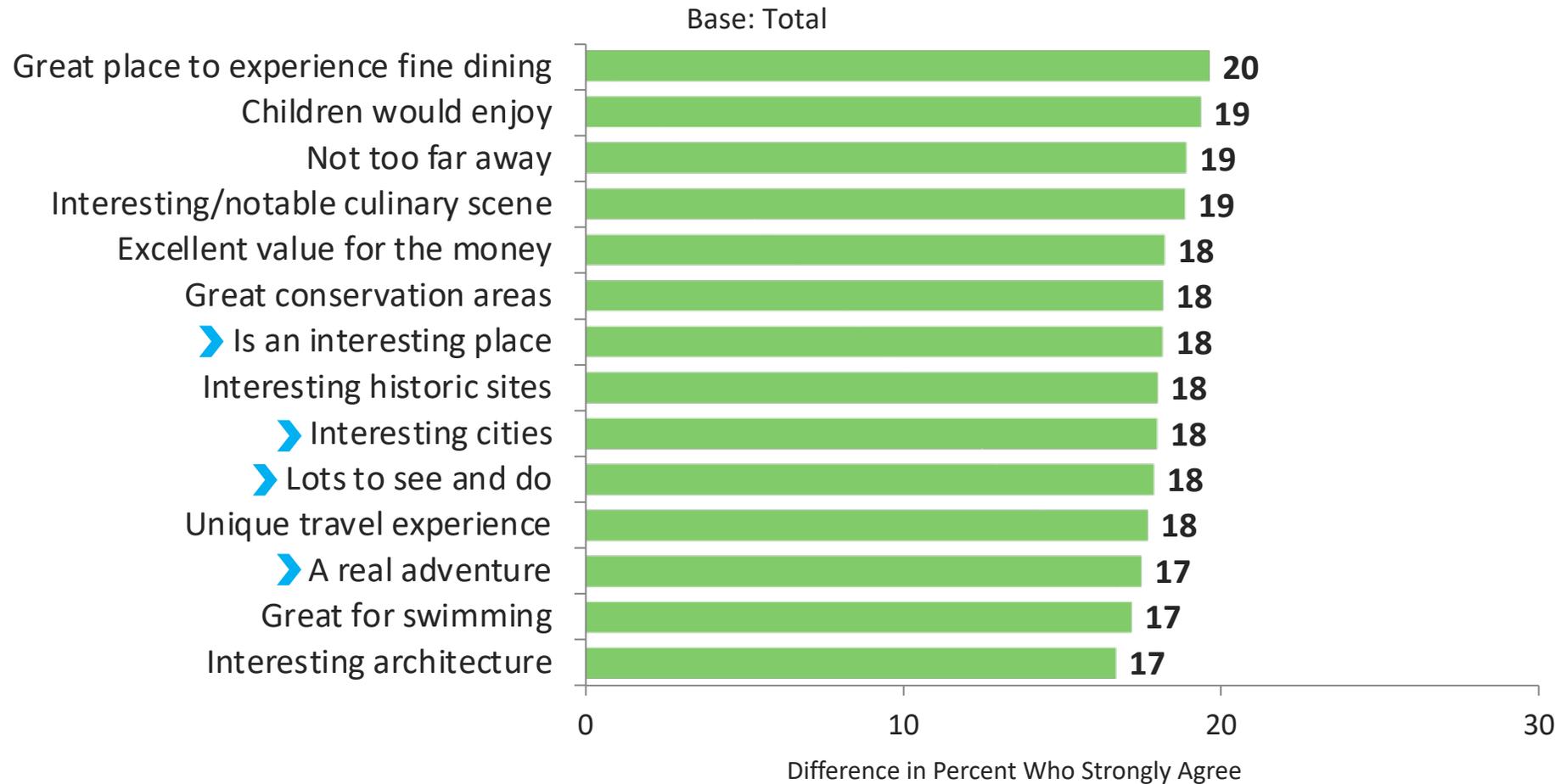
Image Attributes Most Impacted by Advertising – Total Markets

Base: Total



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – Total Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – Total Markets

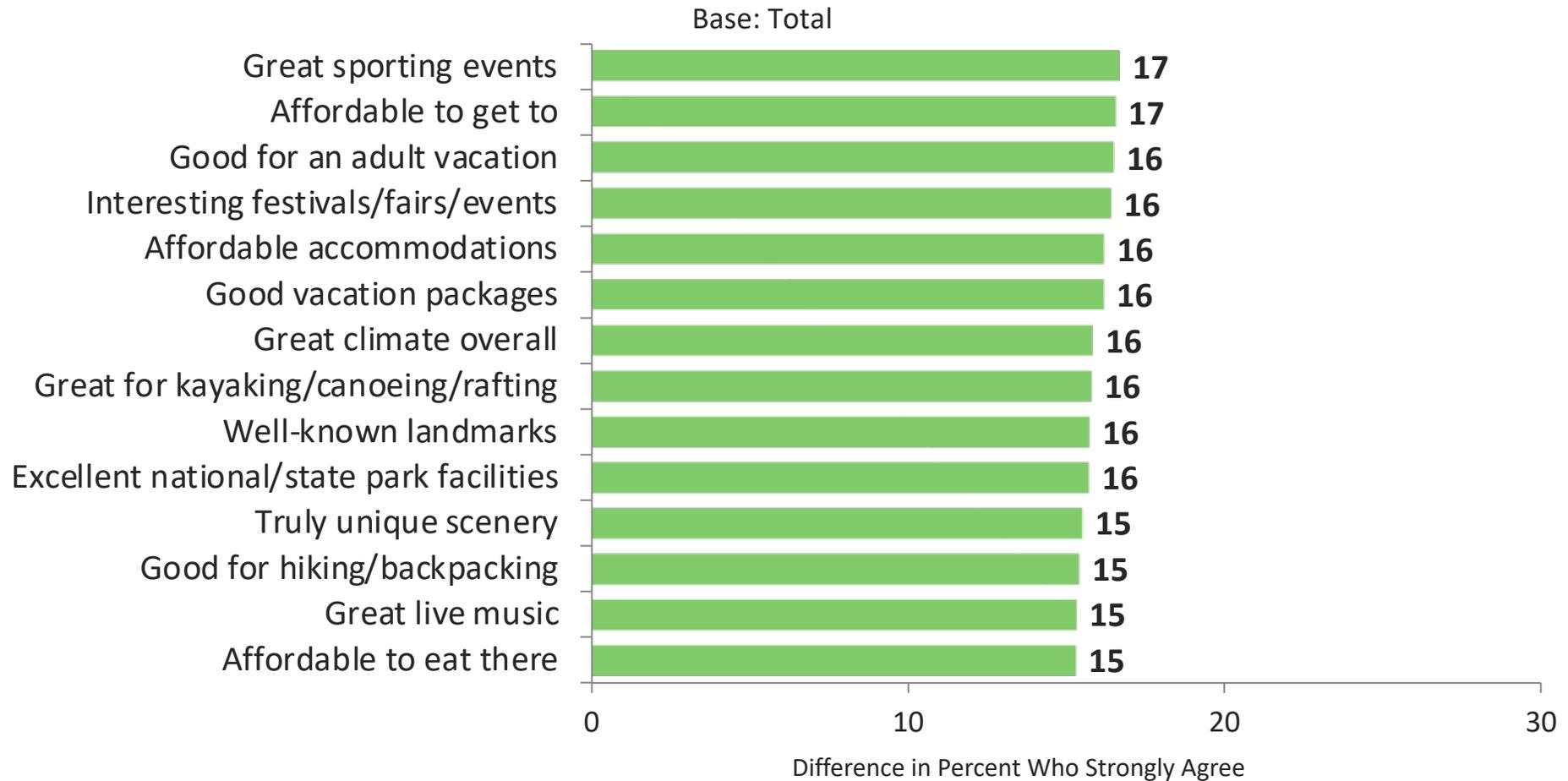
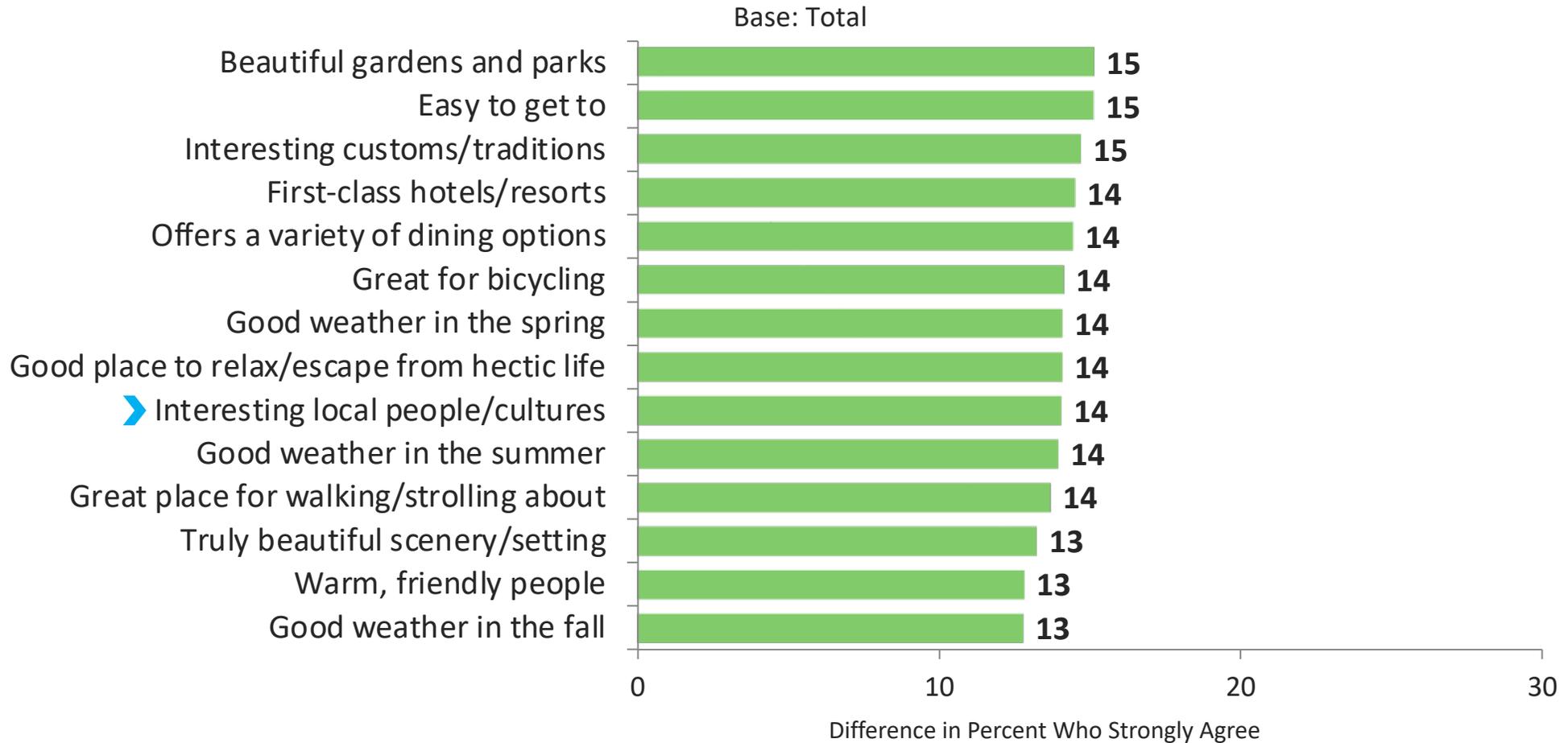
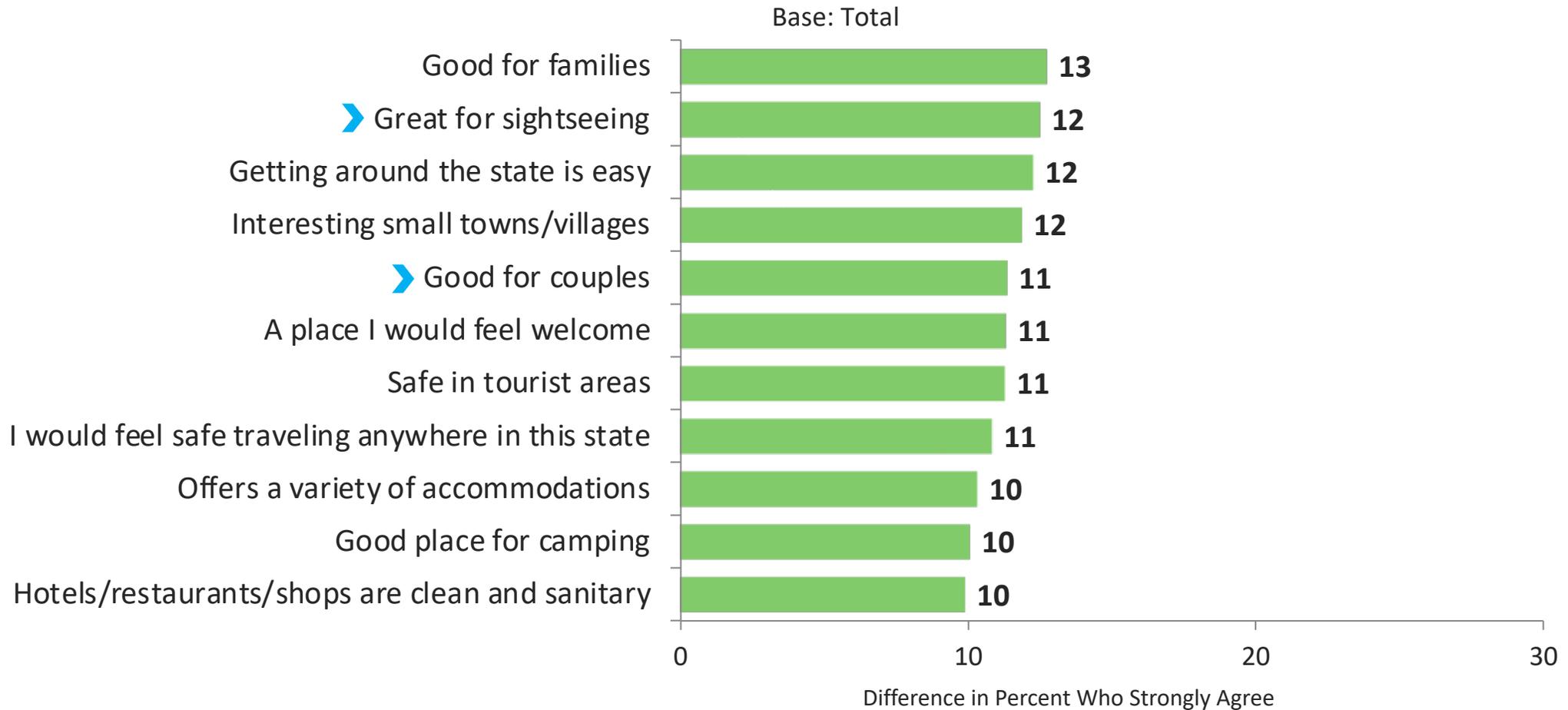


Image Attributes Most Impacted by Advertising (Cont'd) – Total Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – Total Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Advertising Impact on Kentucky's Image – Existing Markets

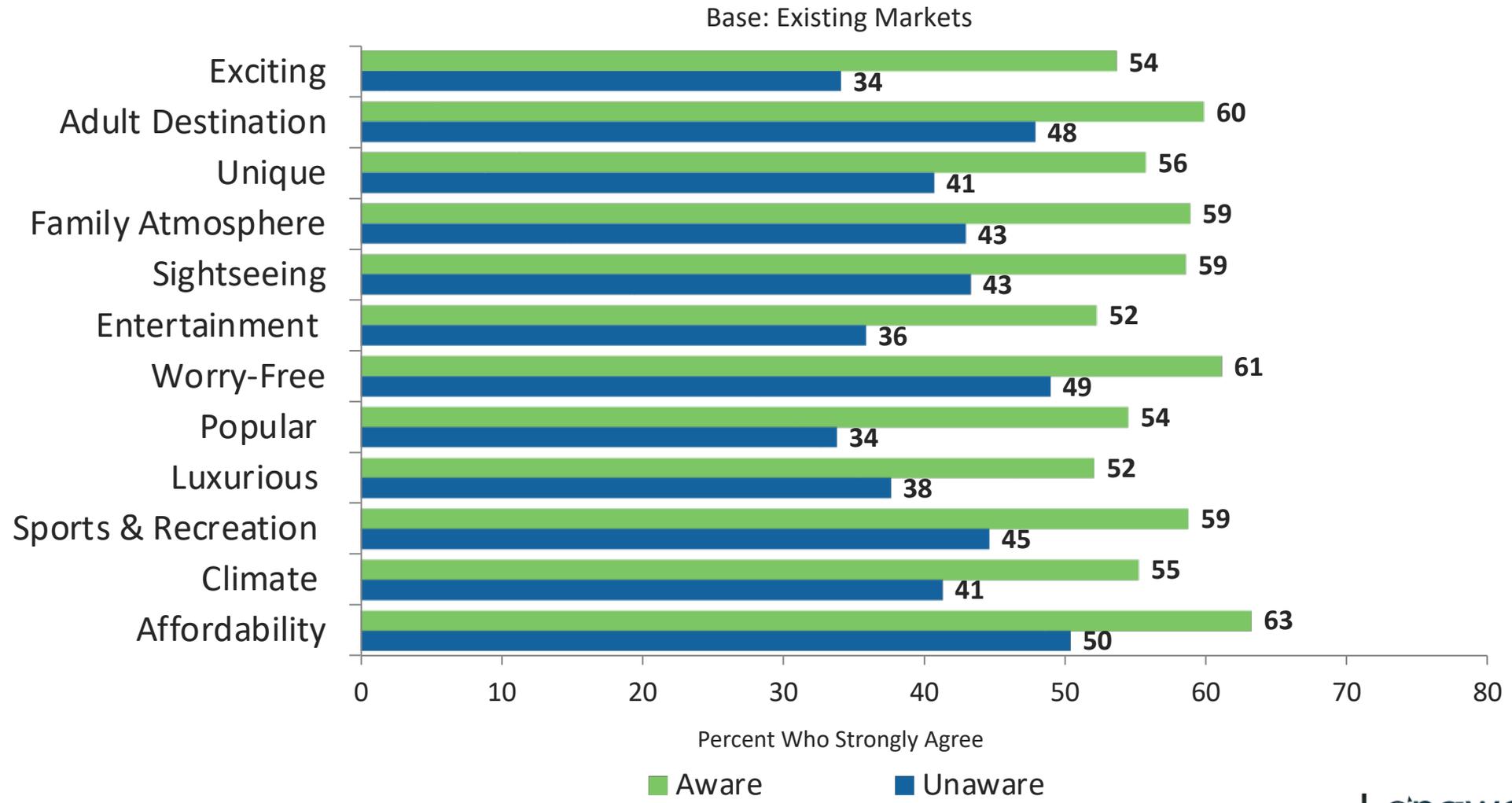
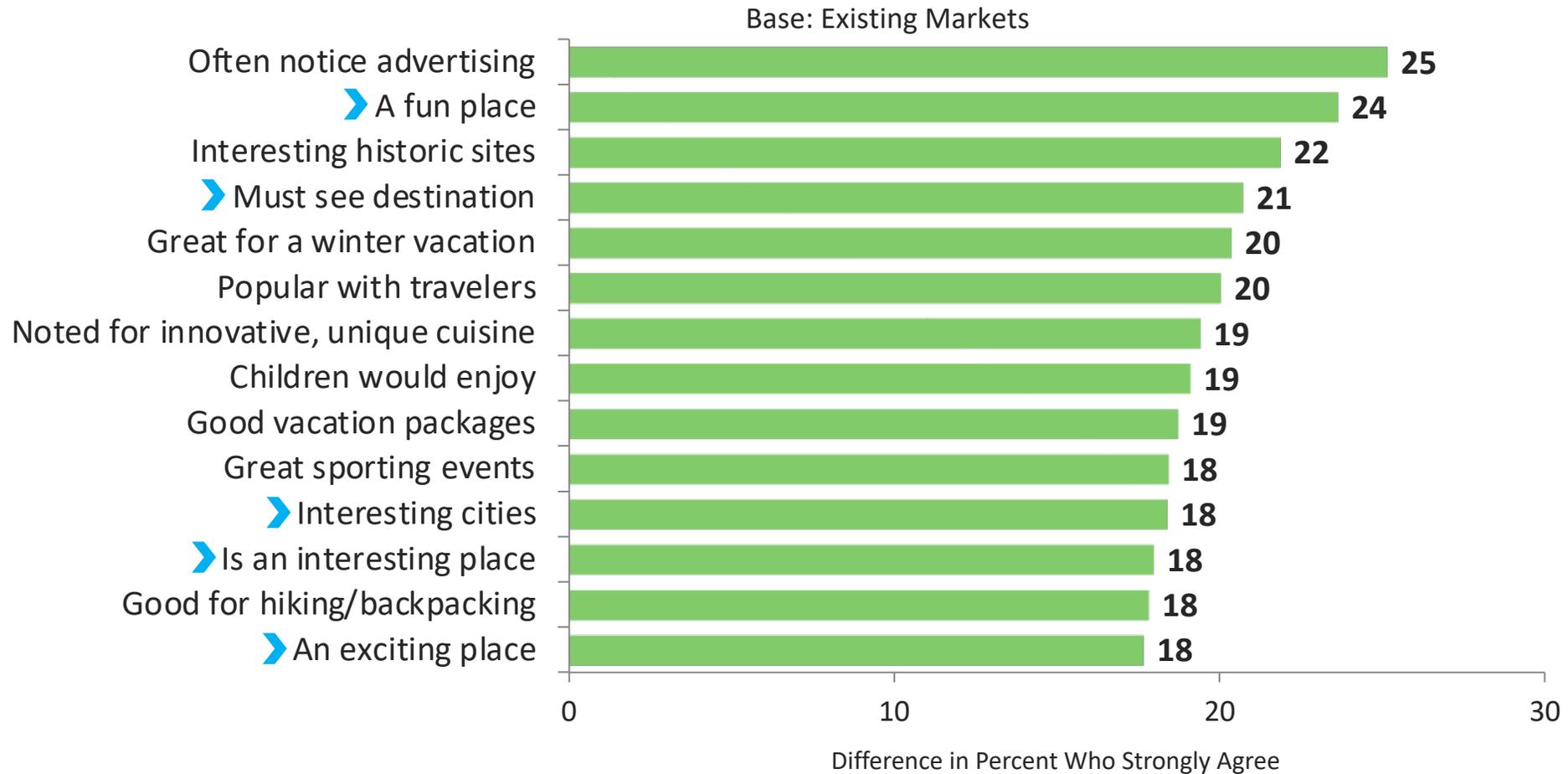
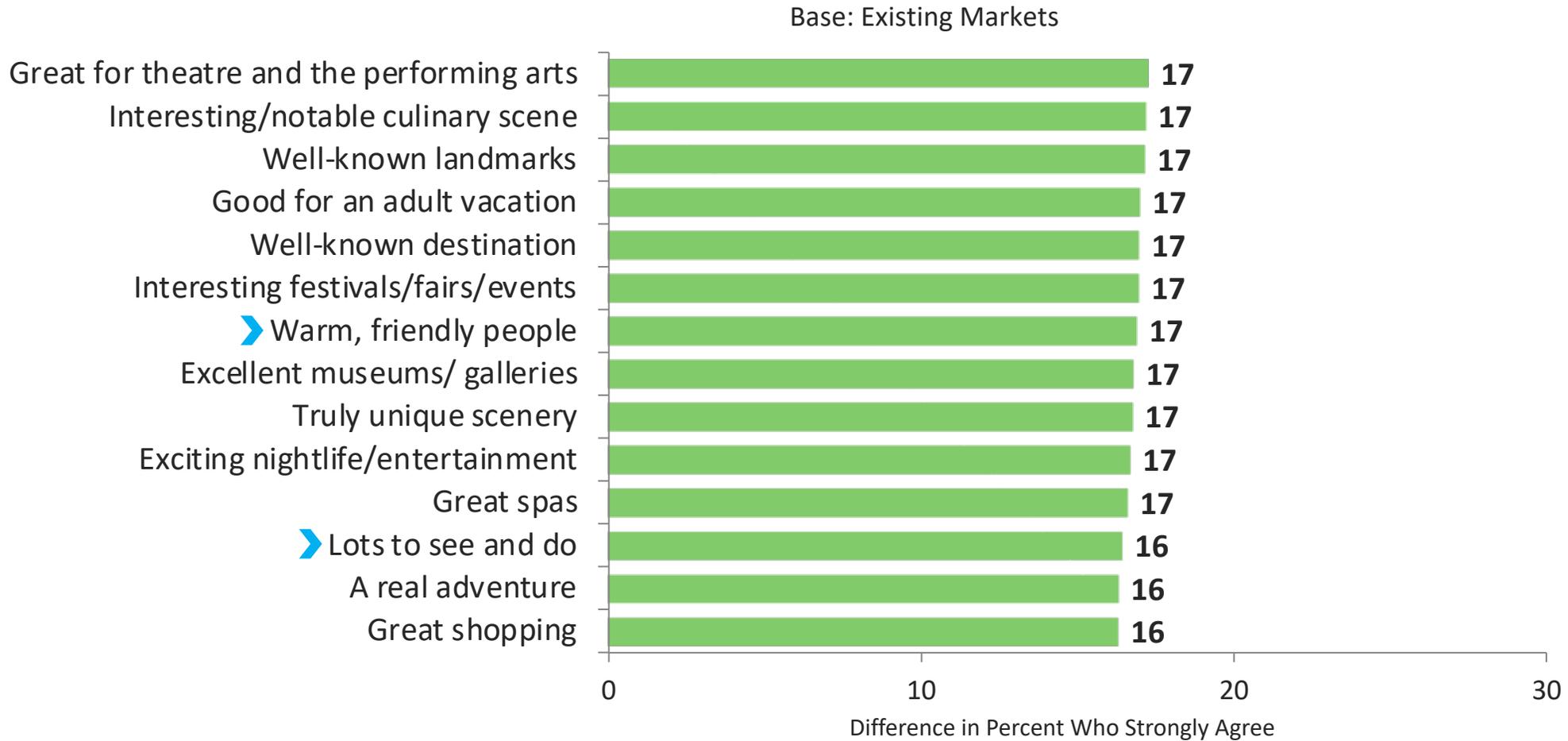


Image Attributes Most Impacted by Advertising – Existing Markets



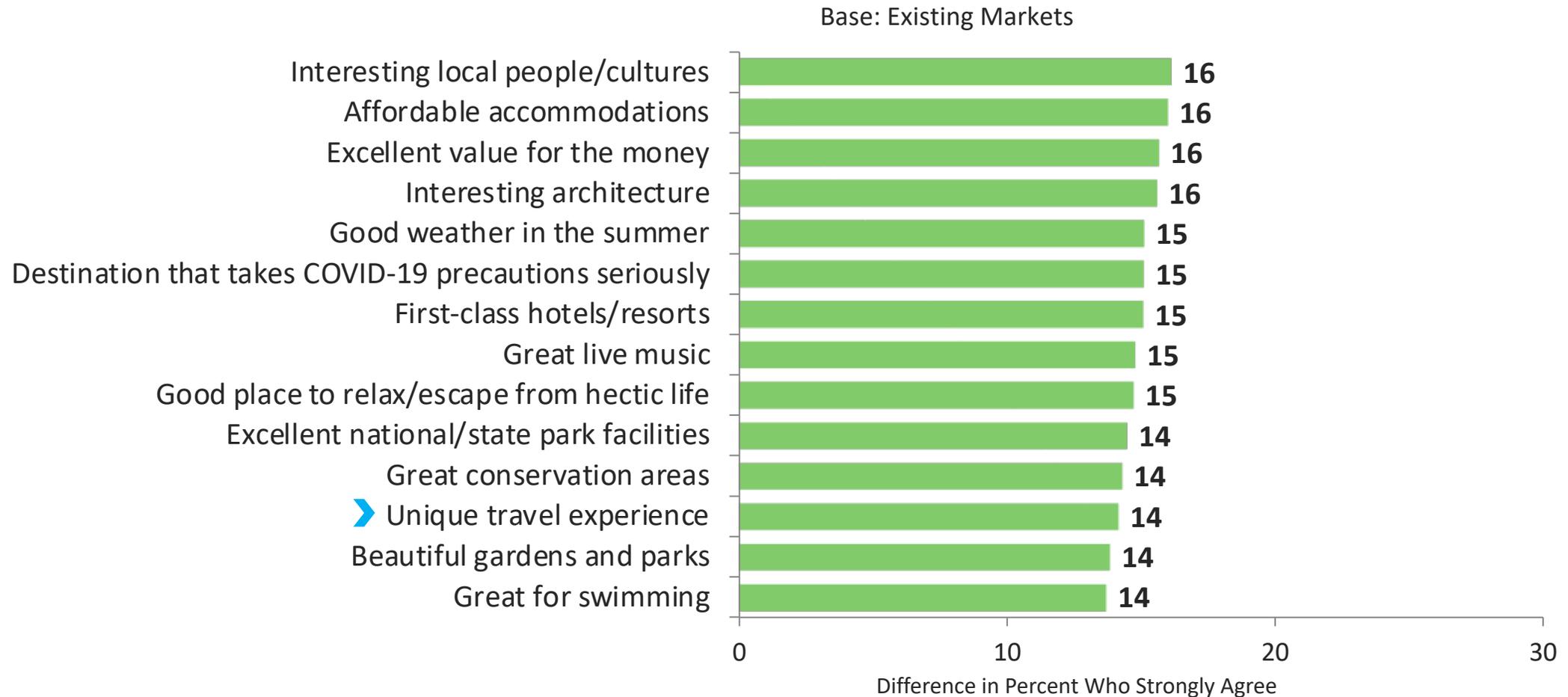
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Image Attributes Most Impacted by Advertising (Cont'd) – Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – Existing Markets

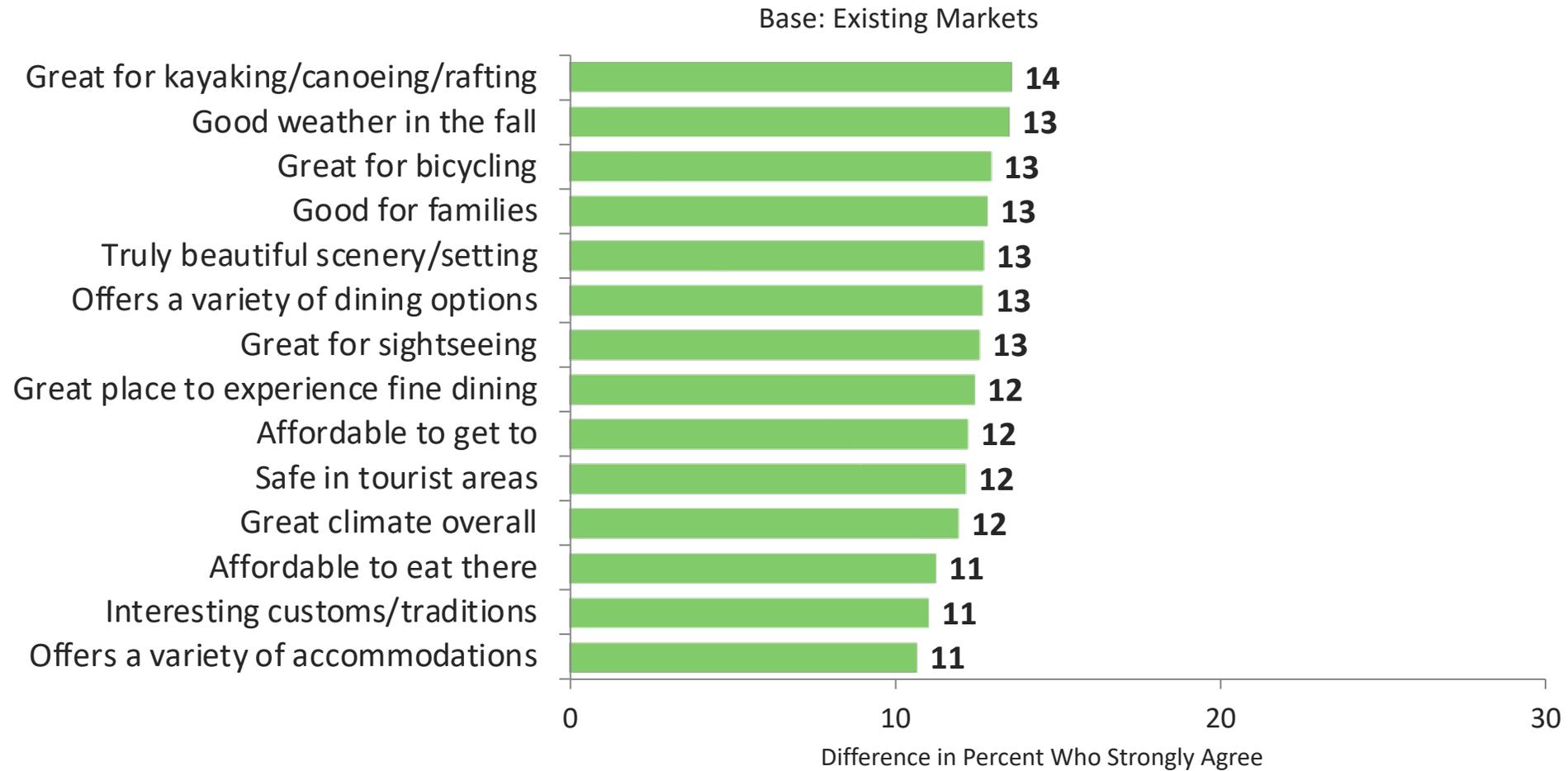
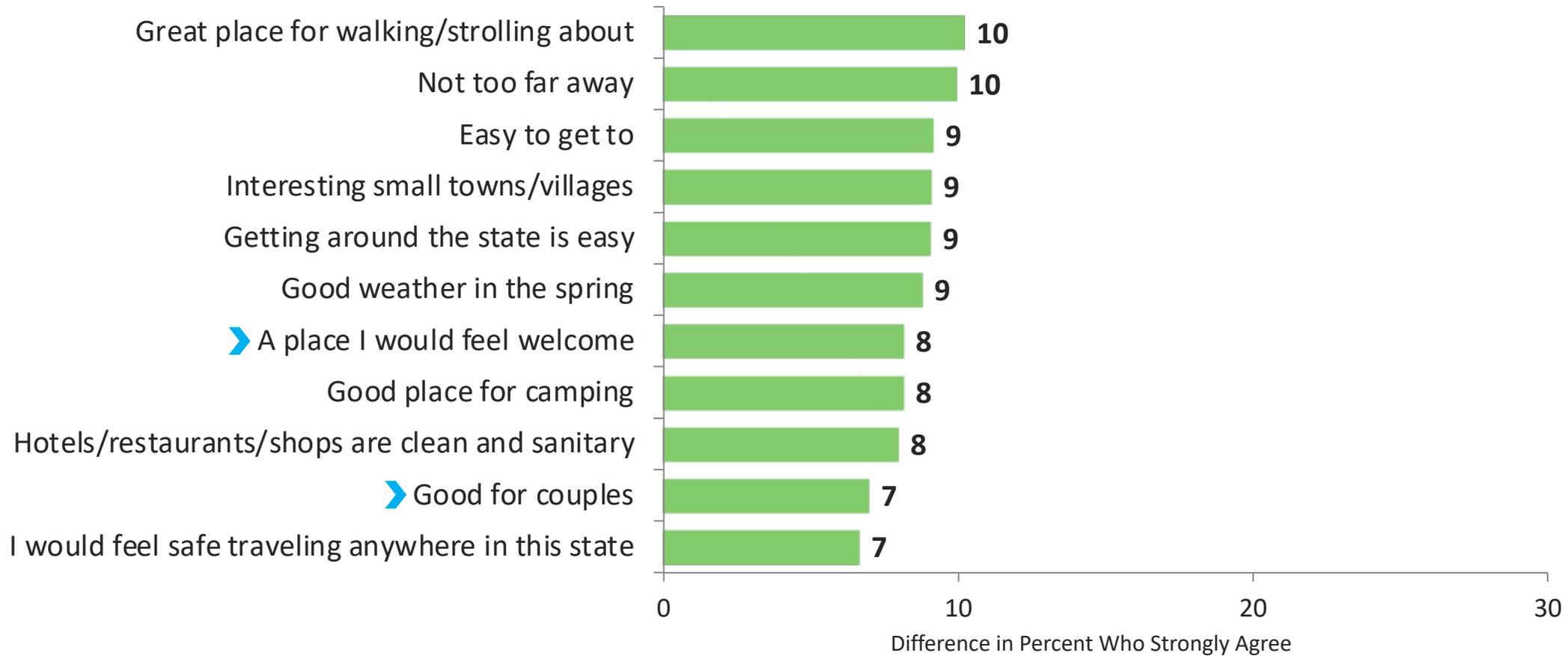


Image Attributes Most Impacted by Advertising (Cont'd) – Existing Markets

Base: Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Advertising Impact on Kentucky's Image – New Markets

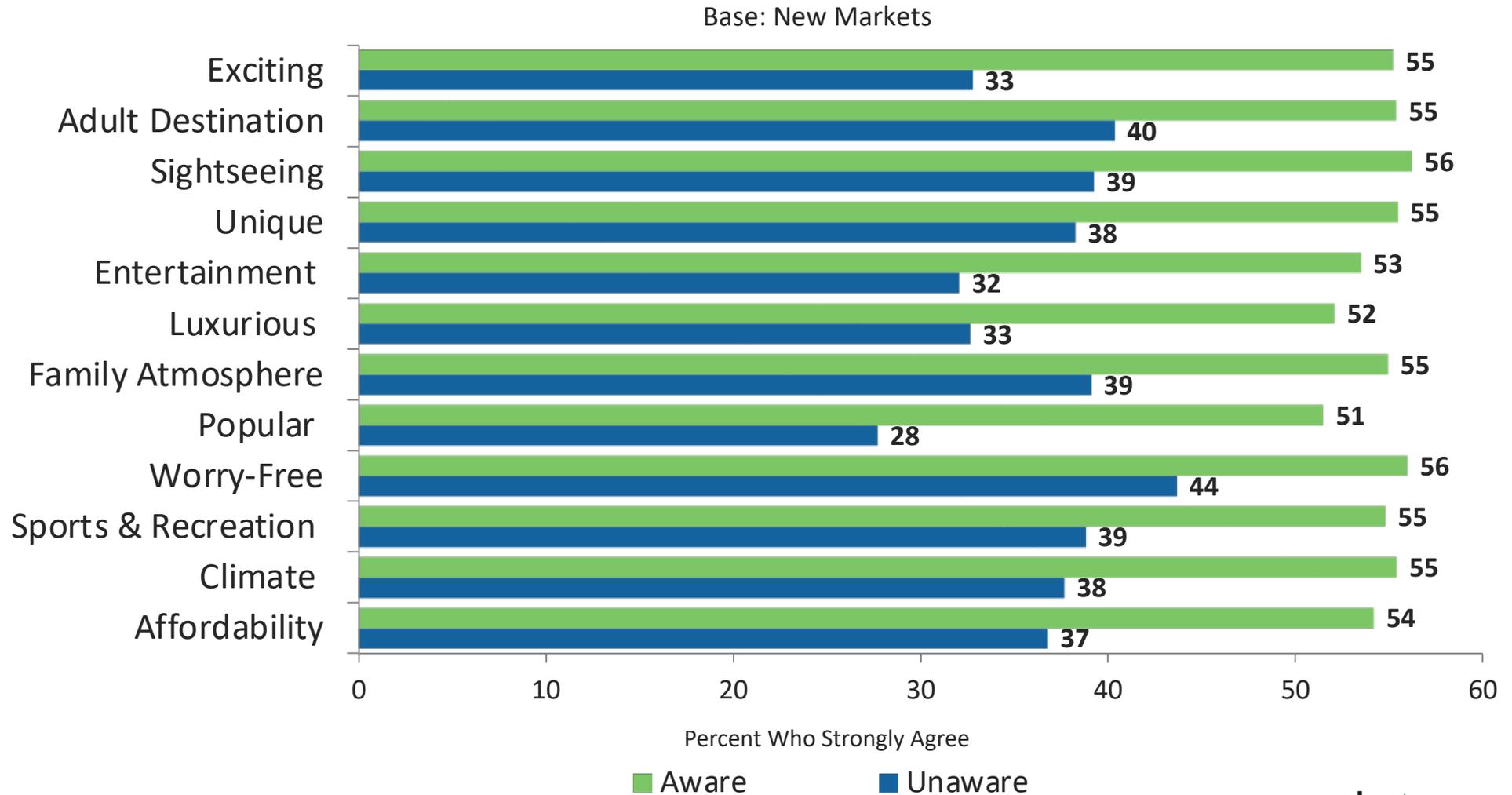
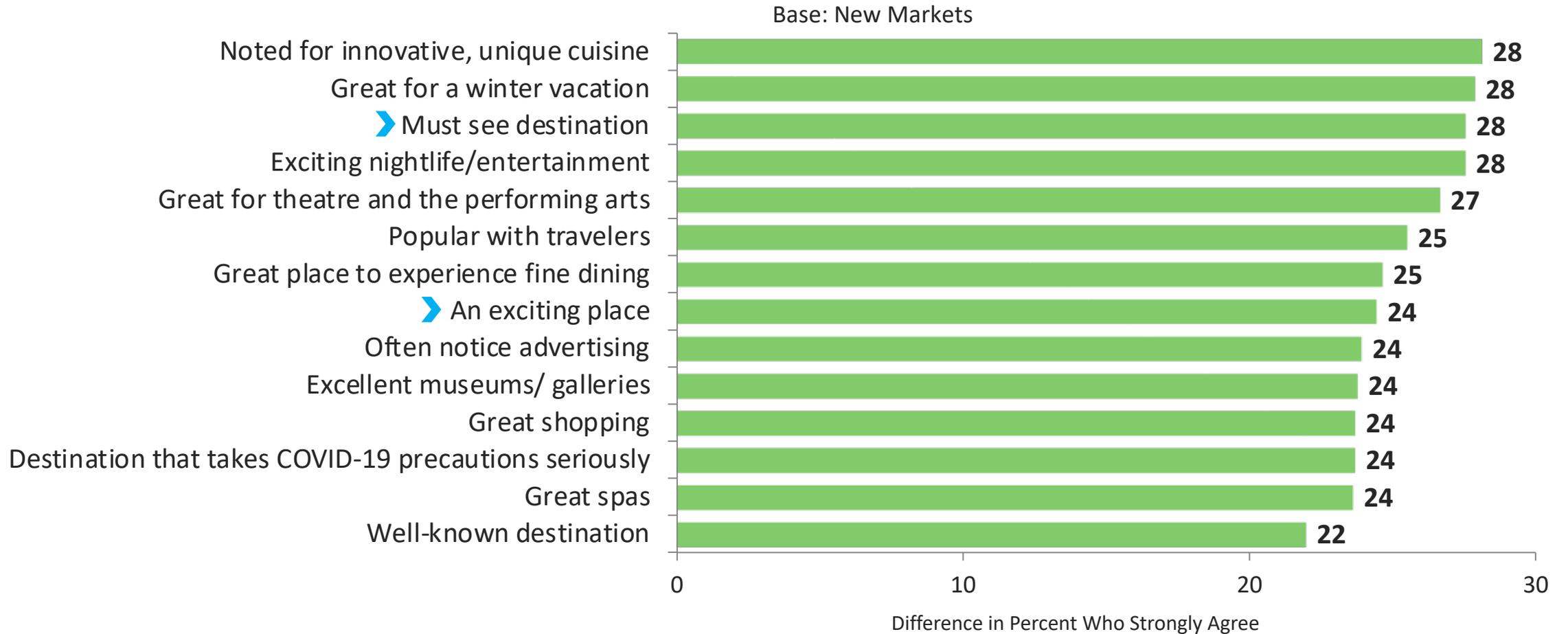
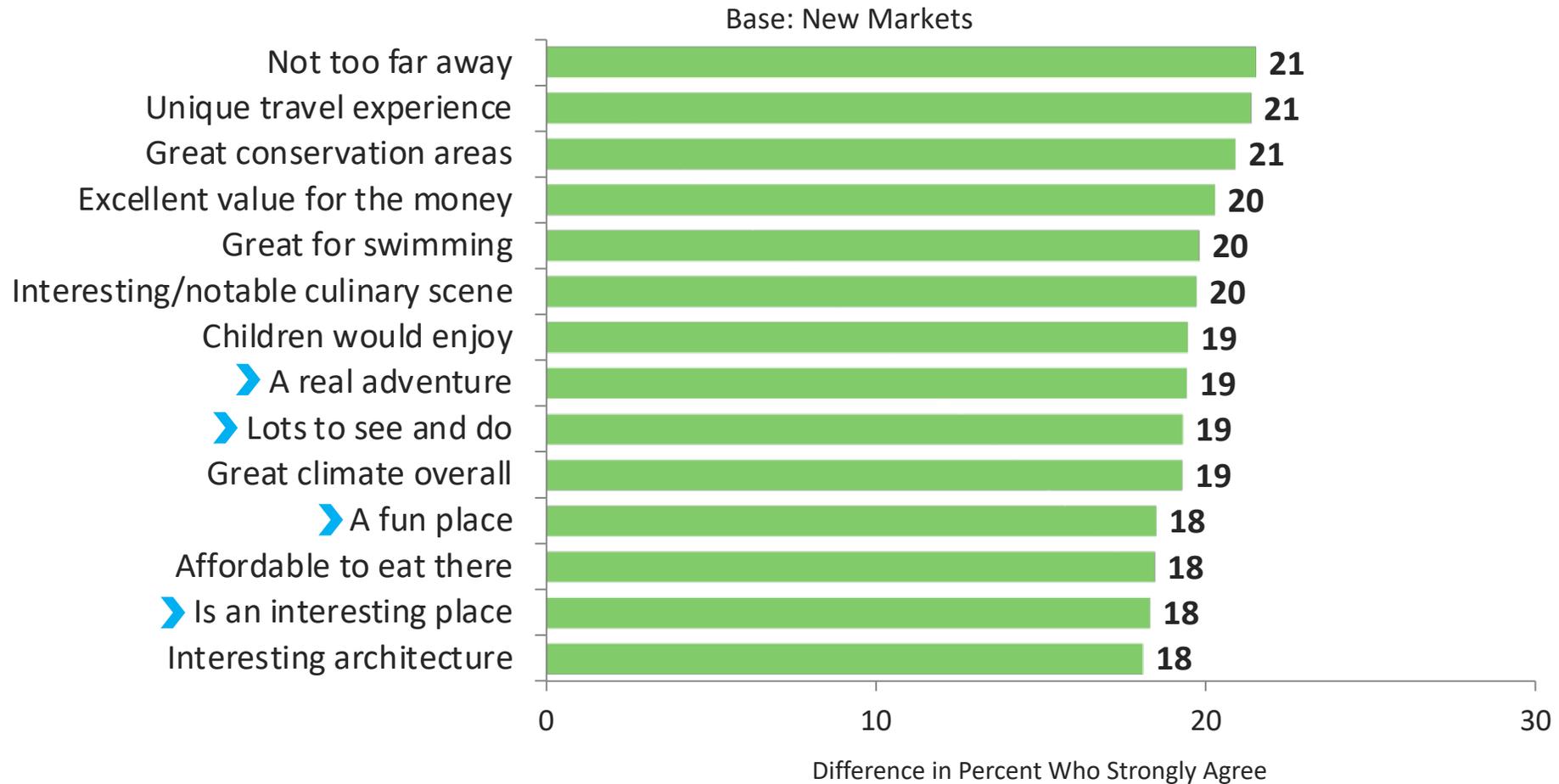


Image Attributes Most Impacted by Advertising – New Markets



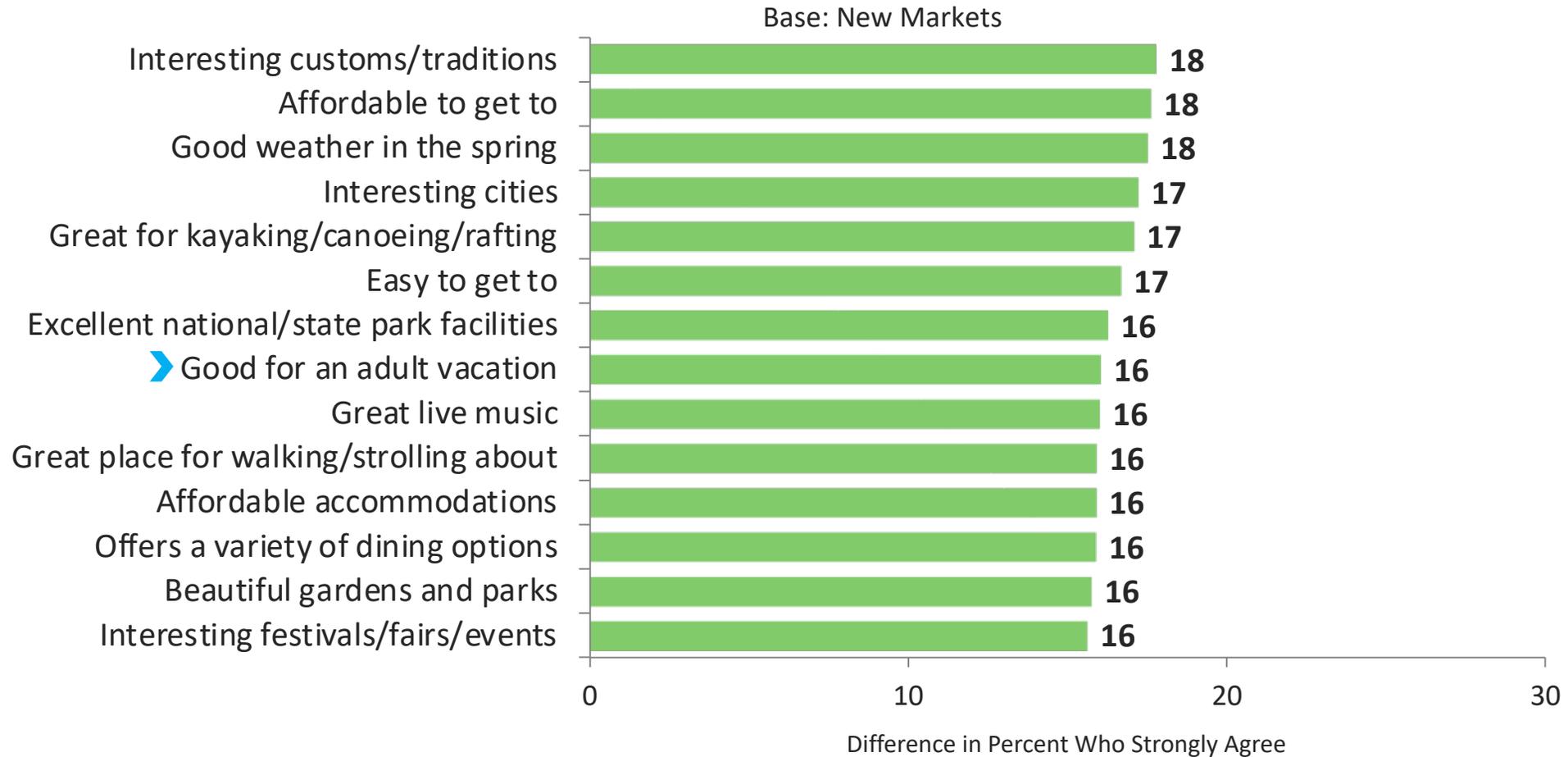
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd) – New Markets



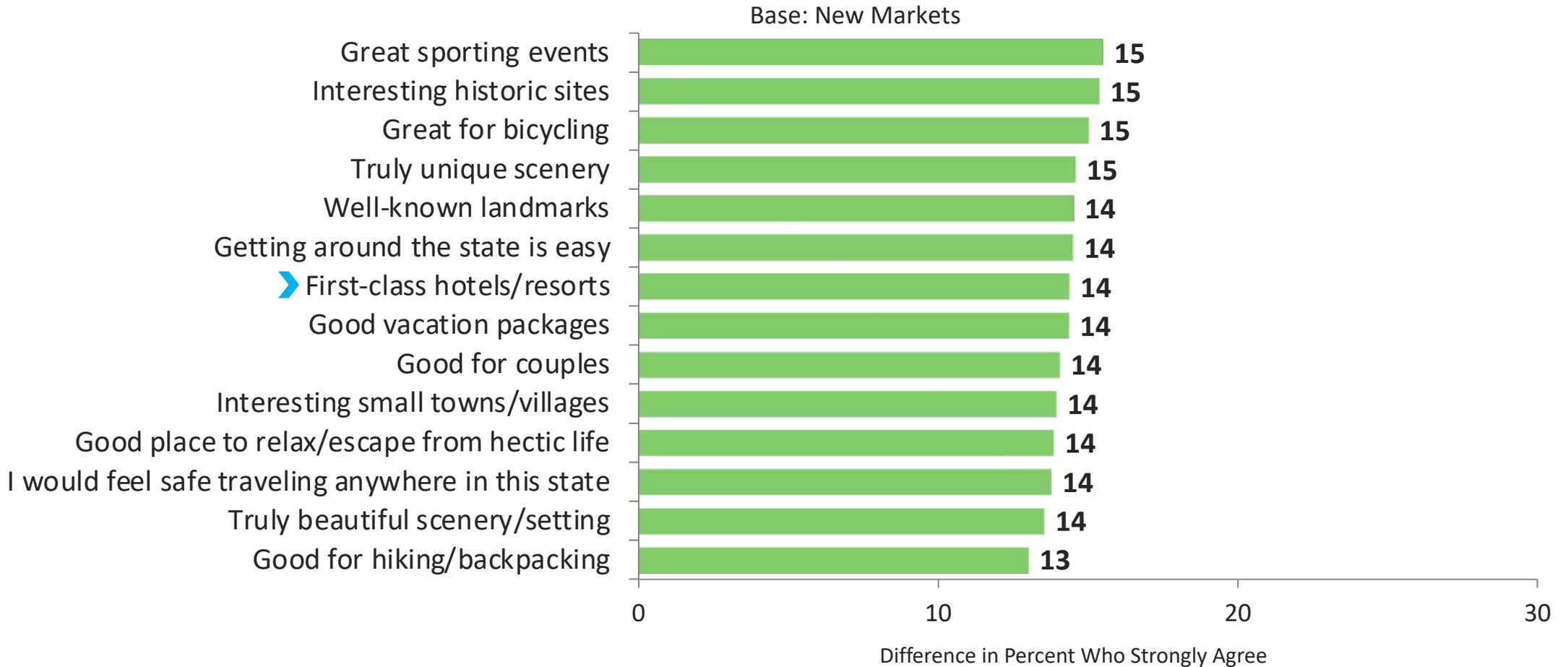
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Image Attributes Most Impacted by Advertising (Cont'd) – New Markets



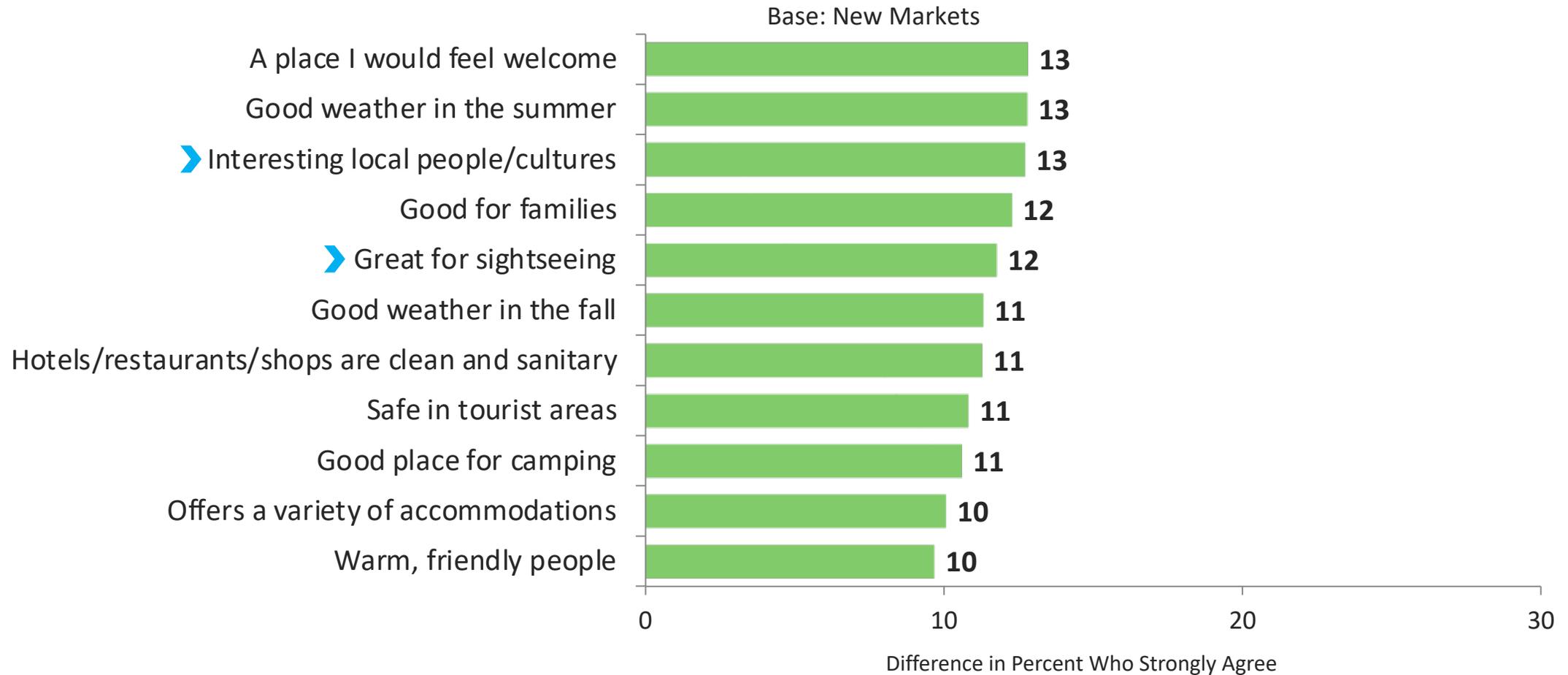
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Image Attributes Most Impacted by Advertising (Cont'd) – New Markets

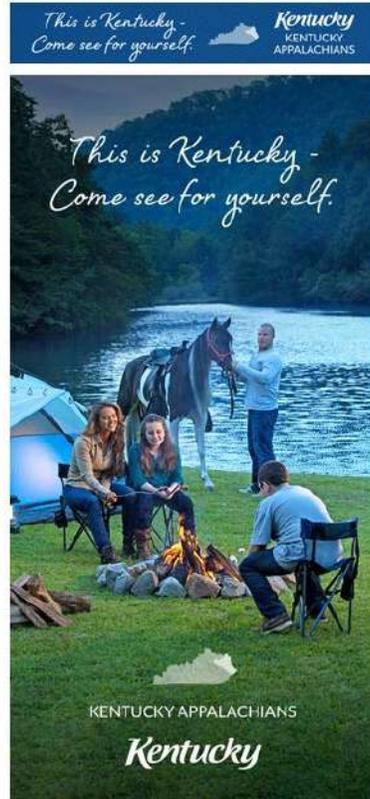


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Image Attributes Most Impacted by Advertising (Cont'd) – New Markets



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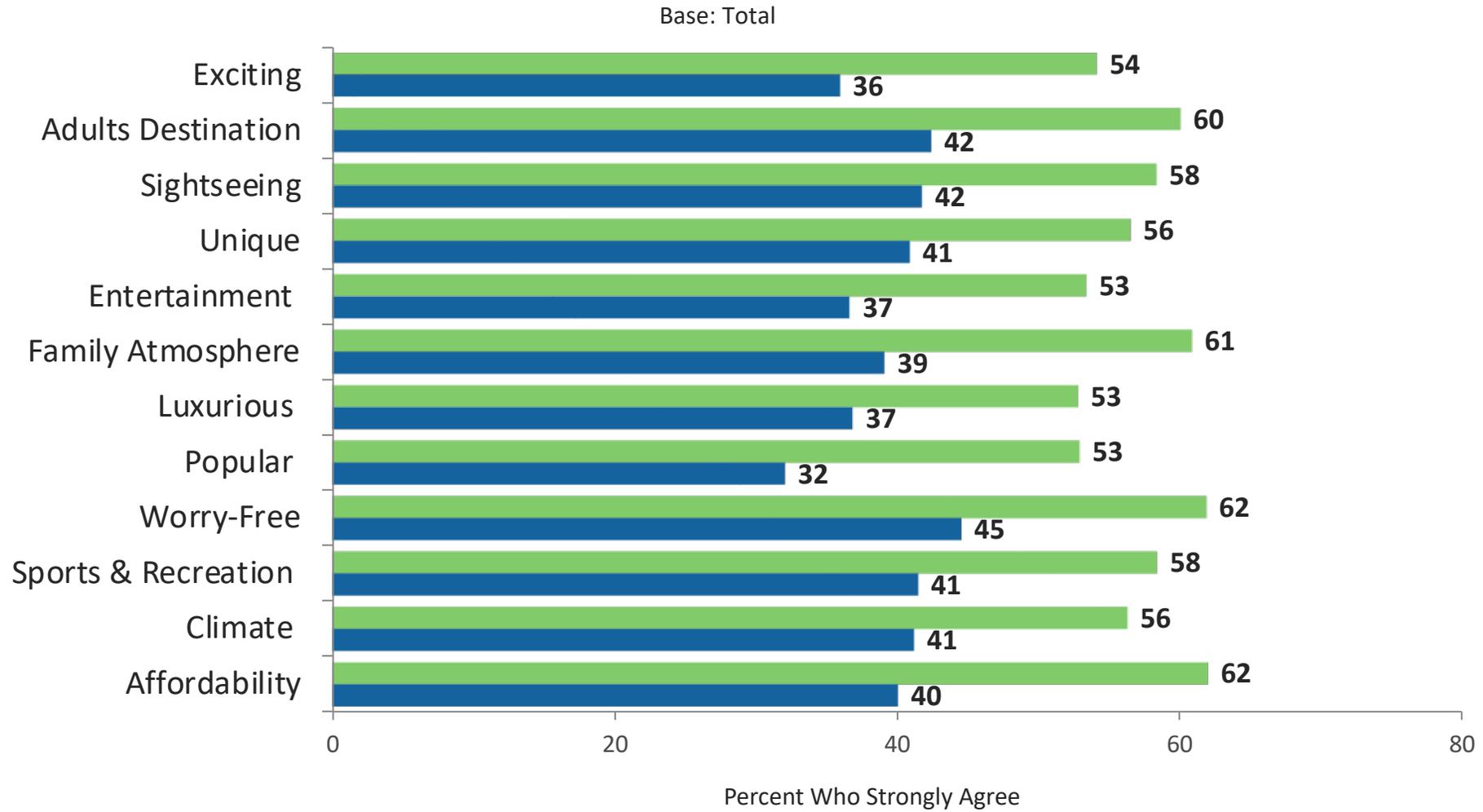
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Kentucky's Product Delivery - Total

Product Delivery – Total Markets

- When we compare the image ratings of travelers who have not visited Kentucky recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.
- From this analysis we find that recent visitation positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study, with the following having a lift of over 15 points:
 - Must see destination
 - An exciting place
 - A fun place
 - Lots of things to see and do
 - Great for sightseeing
 - Is an interesting place
 - Good for couples
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

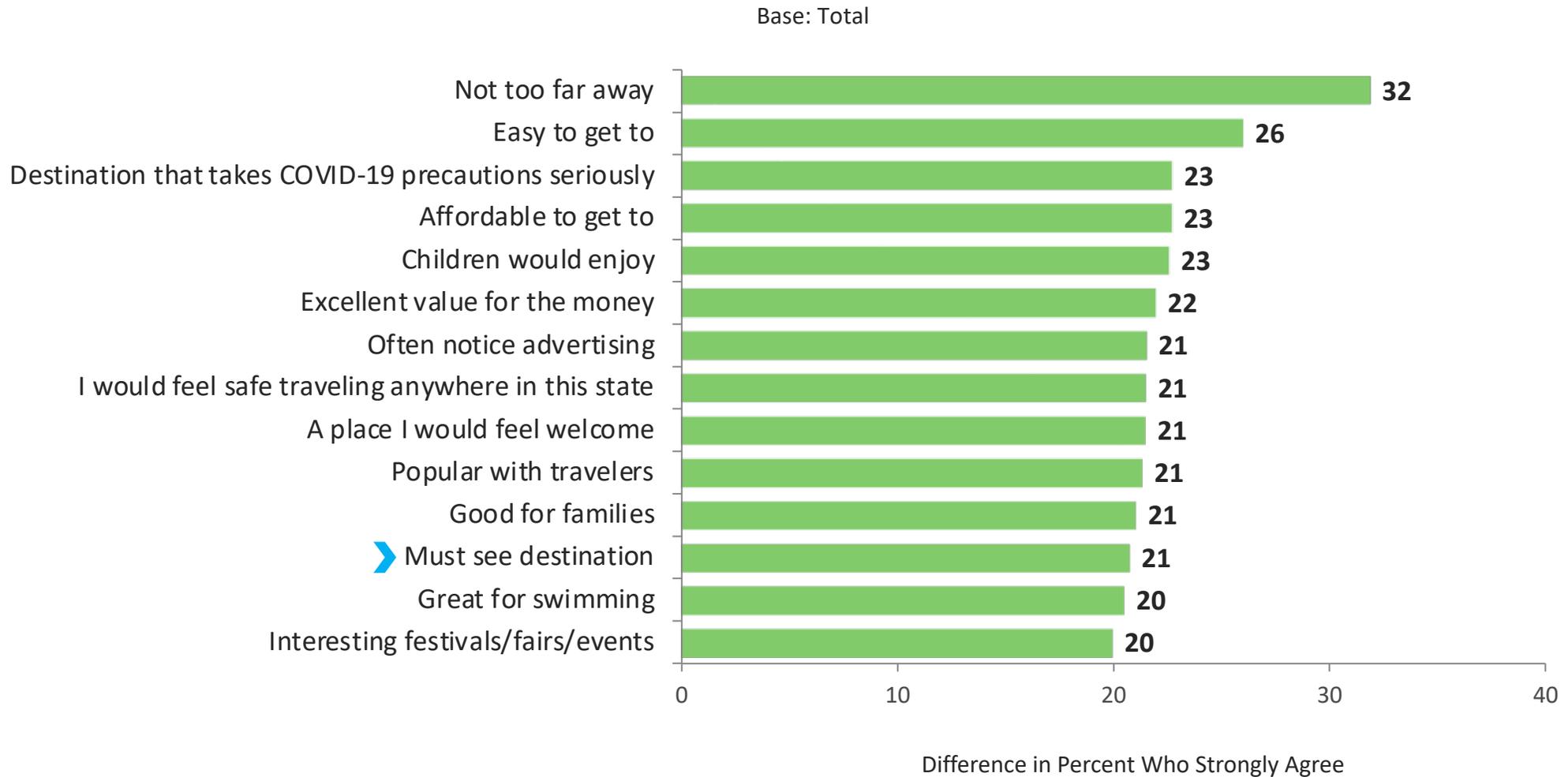
Kentucky's Product vs. Image – Total Markets



* Visited in the past 2 years

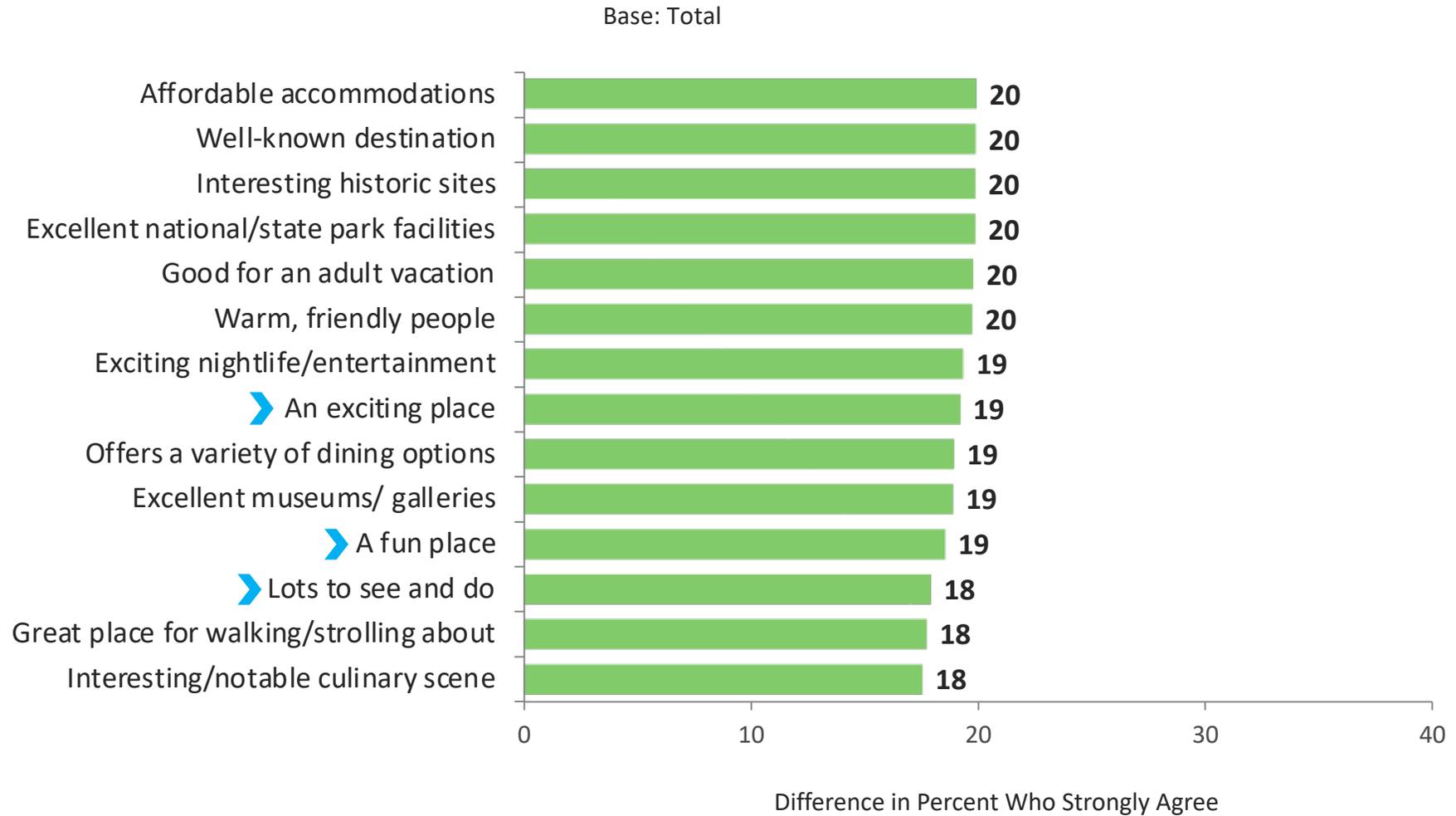
Recent Visitors* Never Visited

Top Product Strengths vs. Image – Total Markets



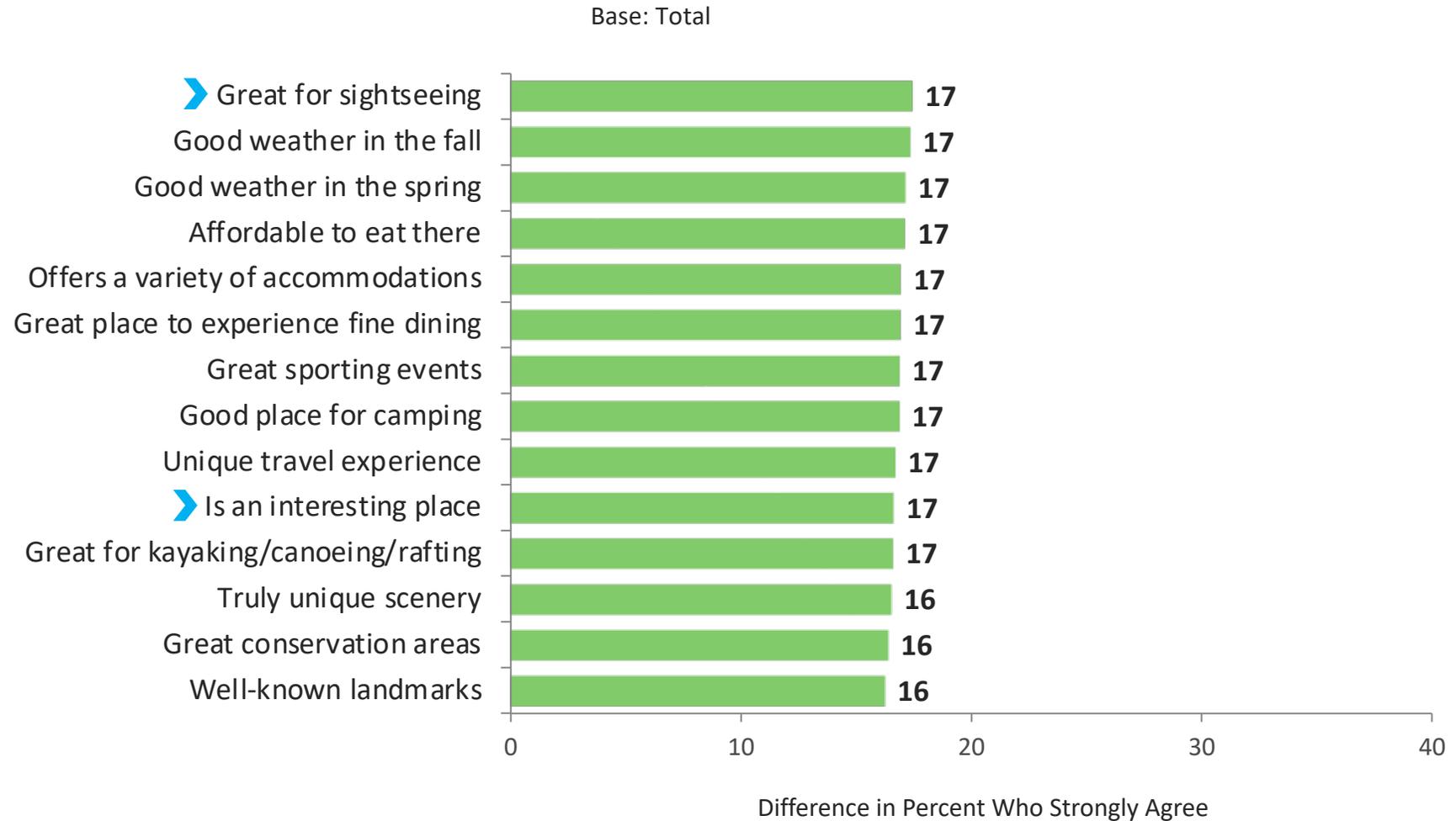
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Top Product Strengths vs. Image – Total Markets (Cont'd)



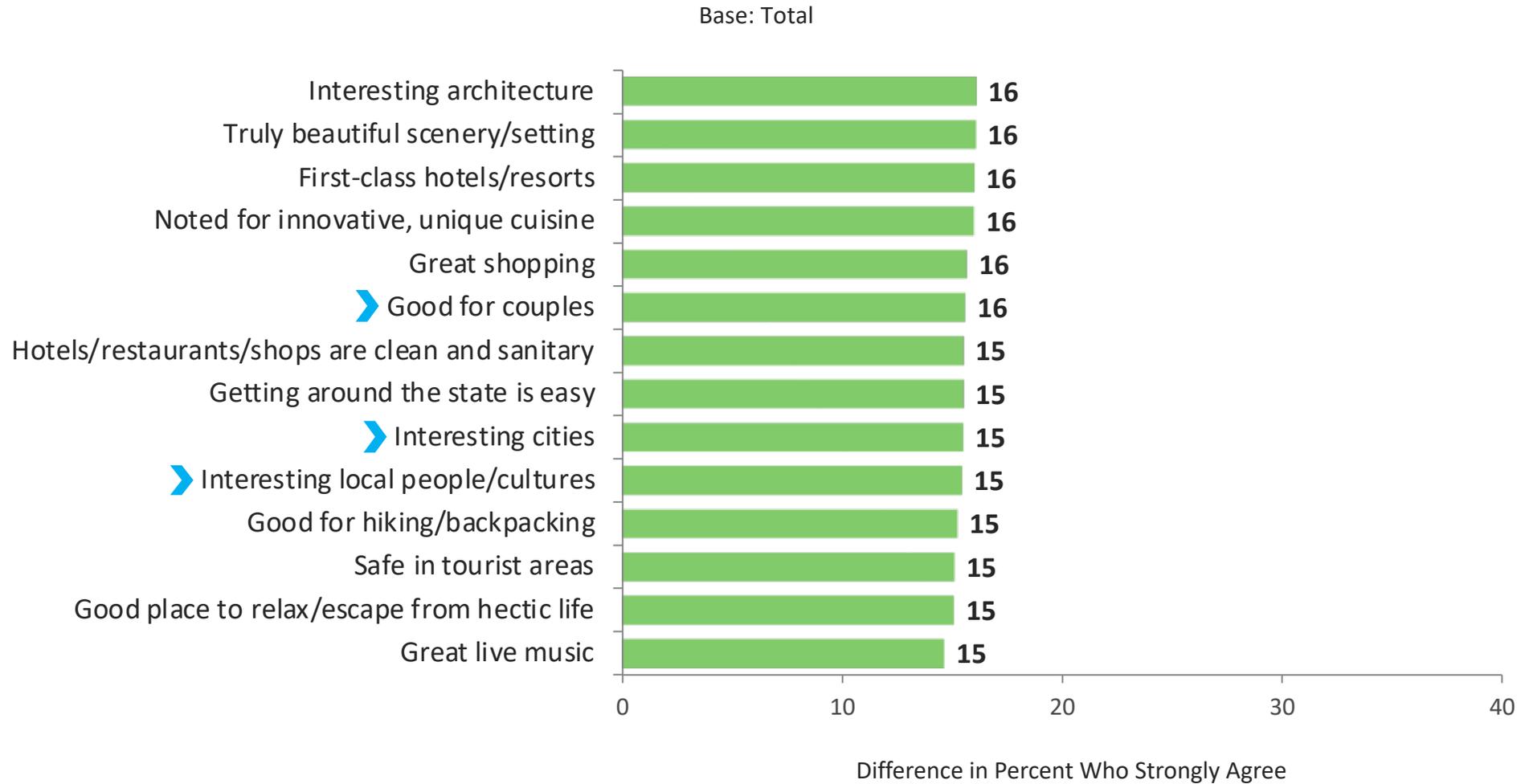
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Top Product Strengths vs. Image – Total Markets (Cont'd)



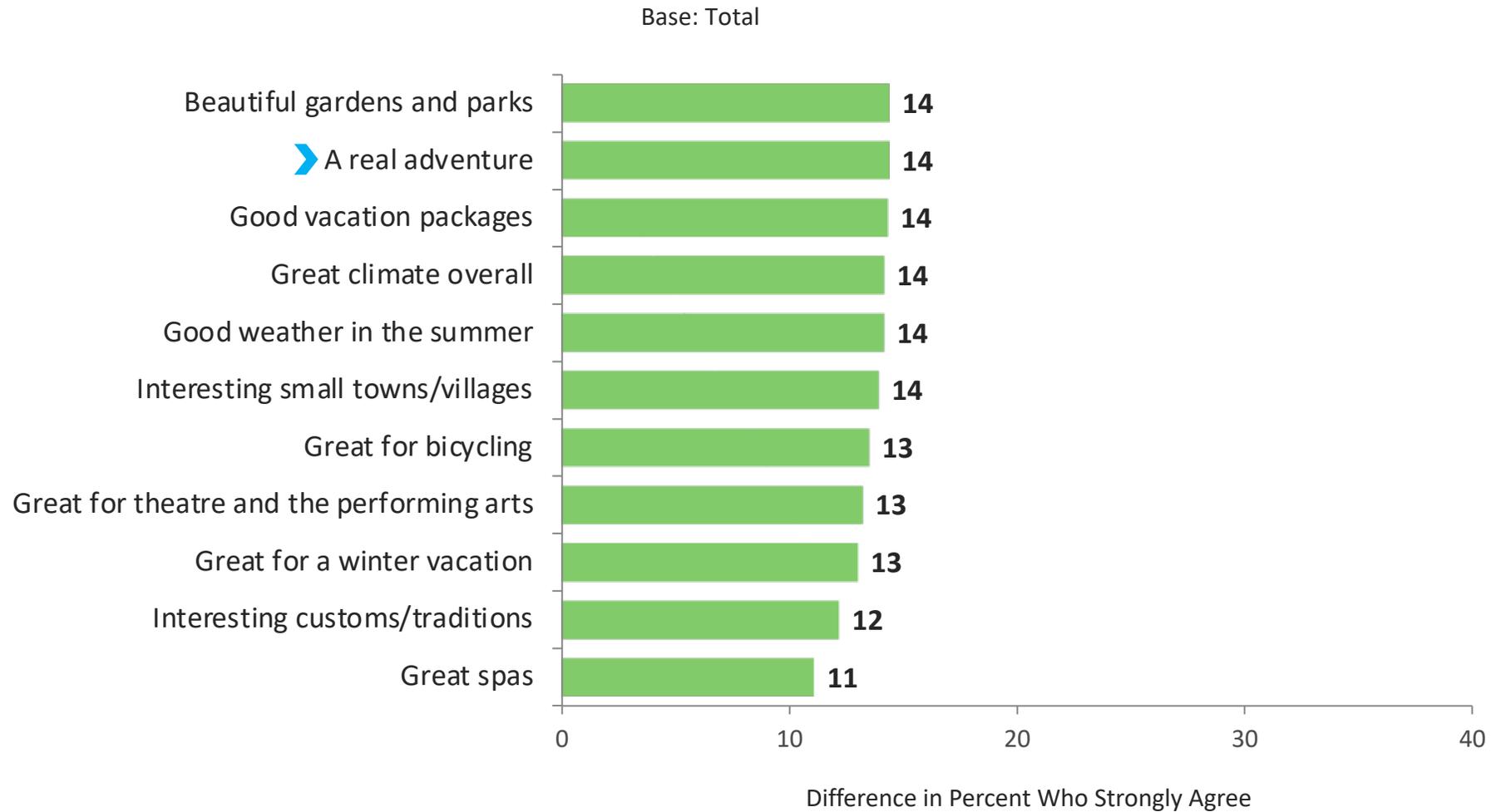
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Top Product Strengths vs. Image – Total Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image – Total Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Weaknesses vs. Image – Total Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



Kentucky's Product Delivery - Existing Markets



That time when Mother Nature said, "Oh yeah, watch this." Stay Close. Go Far. Travel Safe.



KENTUCKYTOURISM.COM
Paddle to the "Niagara of the South." [LEARN MORE](#)



There's just something about the water ... and it's even more captivating in Kentucky. Stay Close. Go Far. Travel Safe.



Enjoy epic outdoor... [LEARN MORE](#)
Plan your getaway!



Paddle to "Niagara"
Plan your



Run and jump, hike and bike, zip and explore Kentucky's great outdoors! Stay Close. Go Far. Travel Safe.

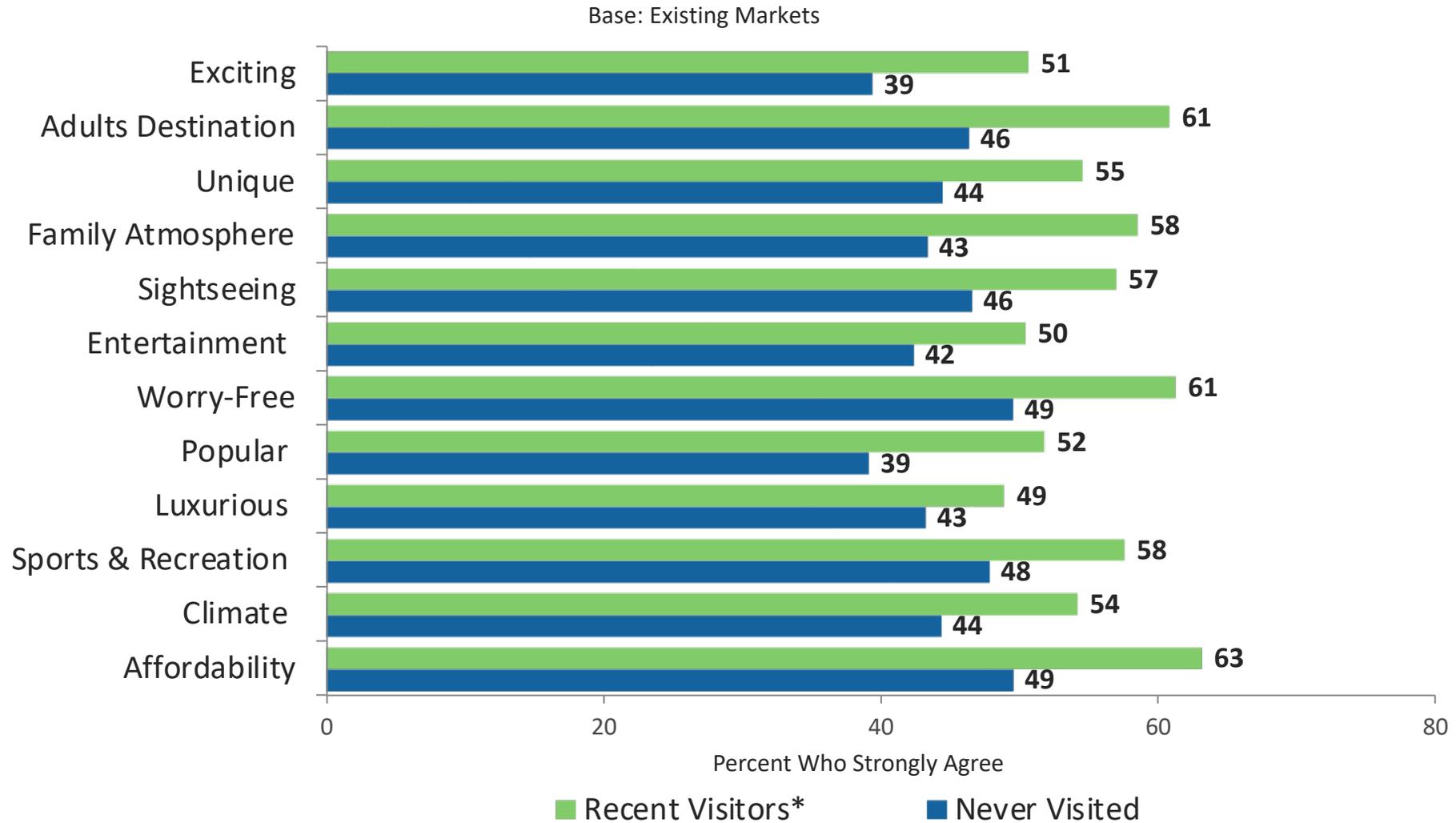


KENTUCKYTOURISM.COM
Discover a hidden waterfall. [LEARN MORE](#)
Plan your Kentucky getaway!

Product Delivery – Existing Markets

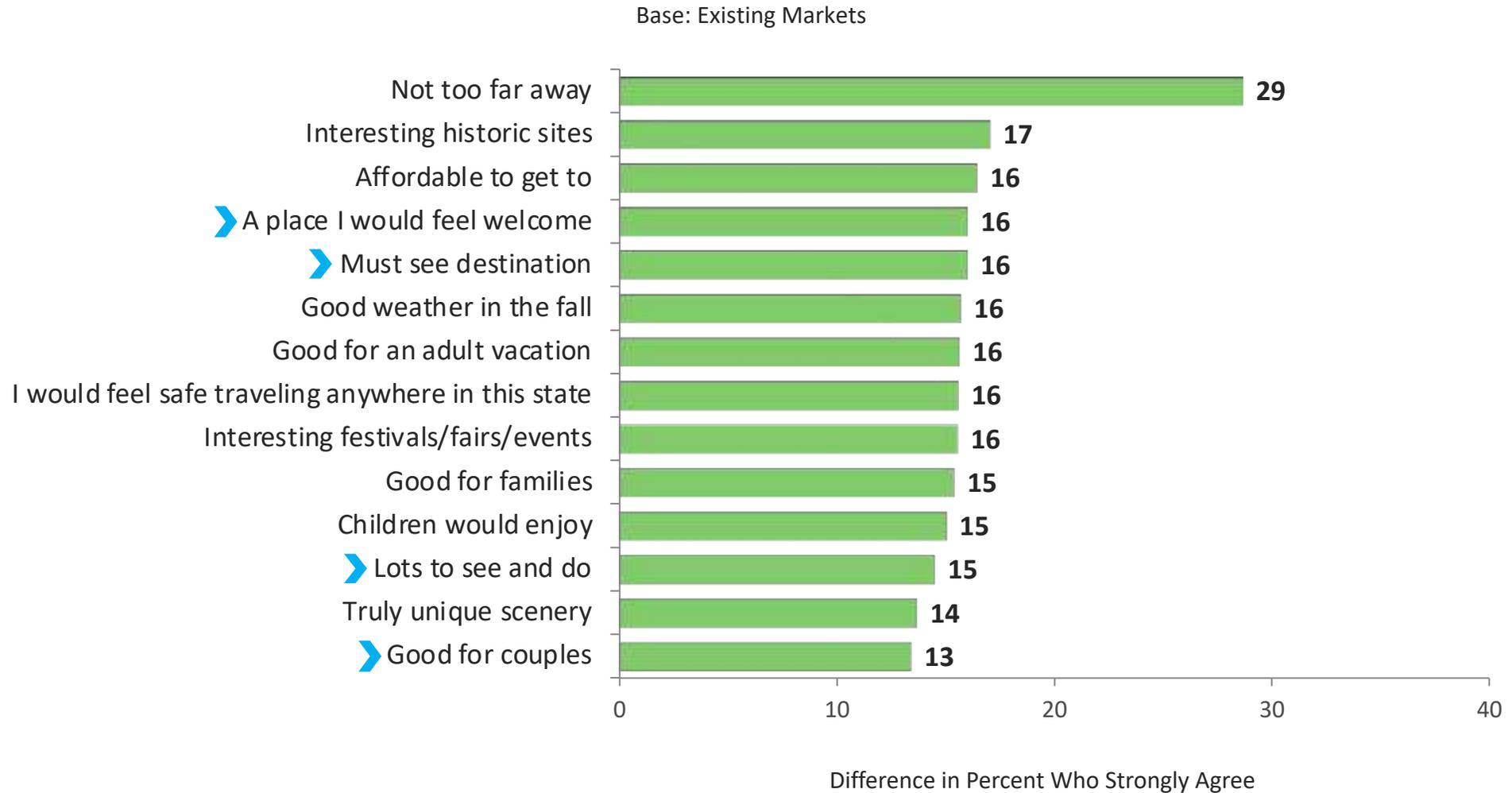
- When we compare the image ratings of travelers who have not visited Kentucky recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.
- From this analysis we find that recent visitation from the state’s existing markets positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study, with the following having a lift of over 14 points:
 - A place I would feel welcome
 - Must see destination
 - Lots of things to see and do
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

Kentucky's Product vs. Image – Existing Markets



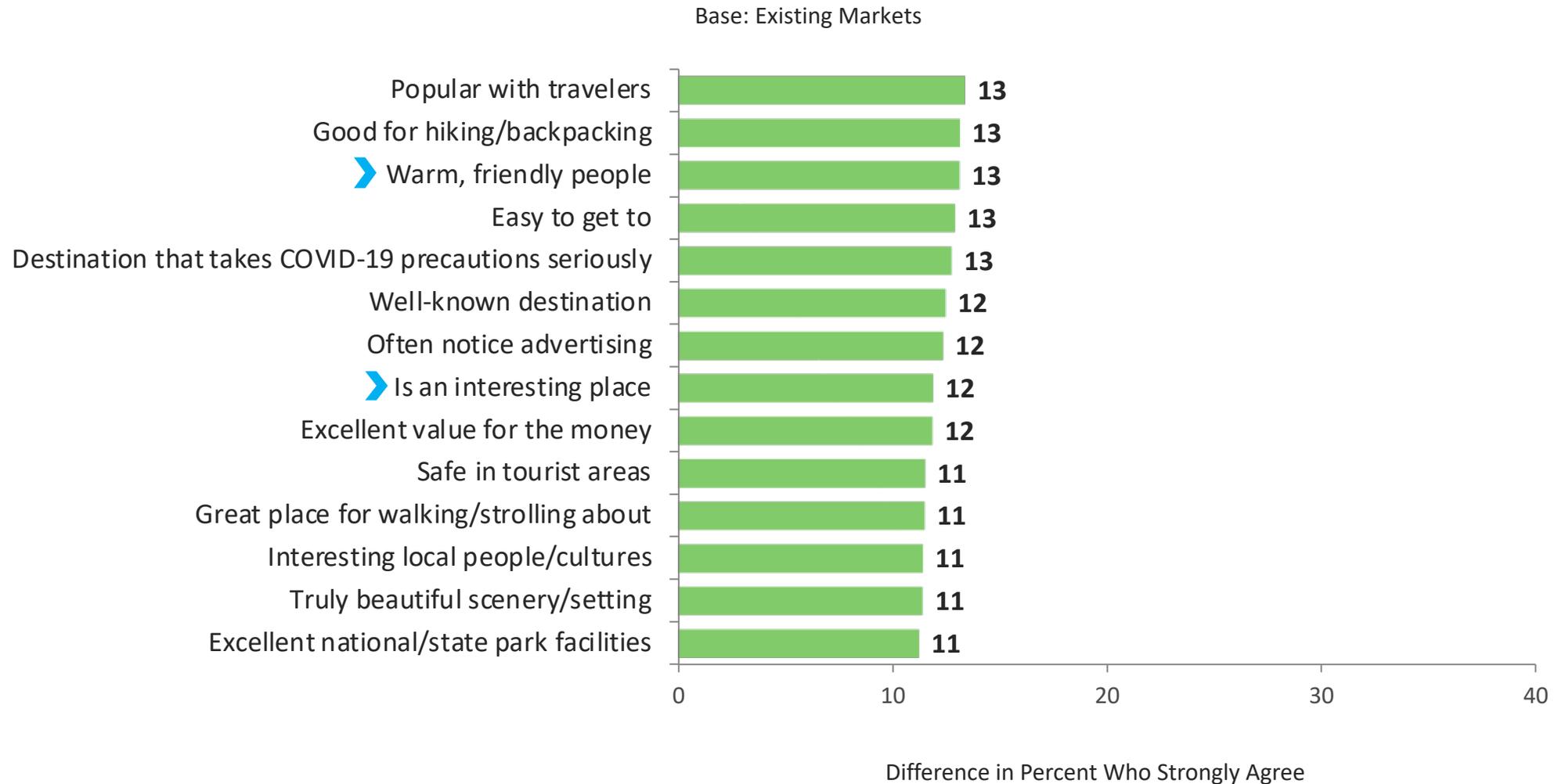
* Visited in the past 2 years

Top Product Strengths vs. Image – Existing Markets



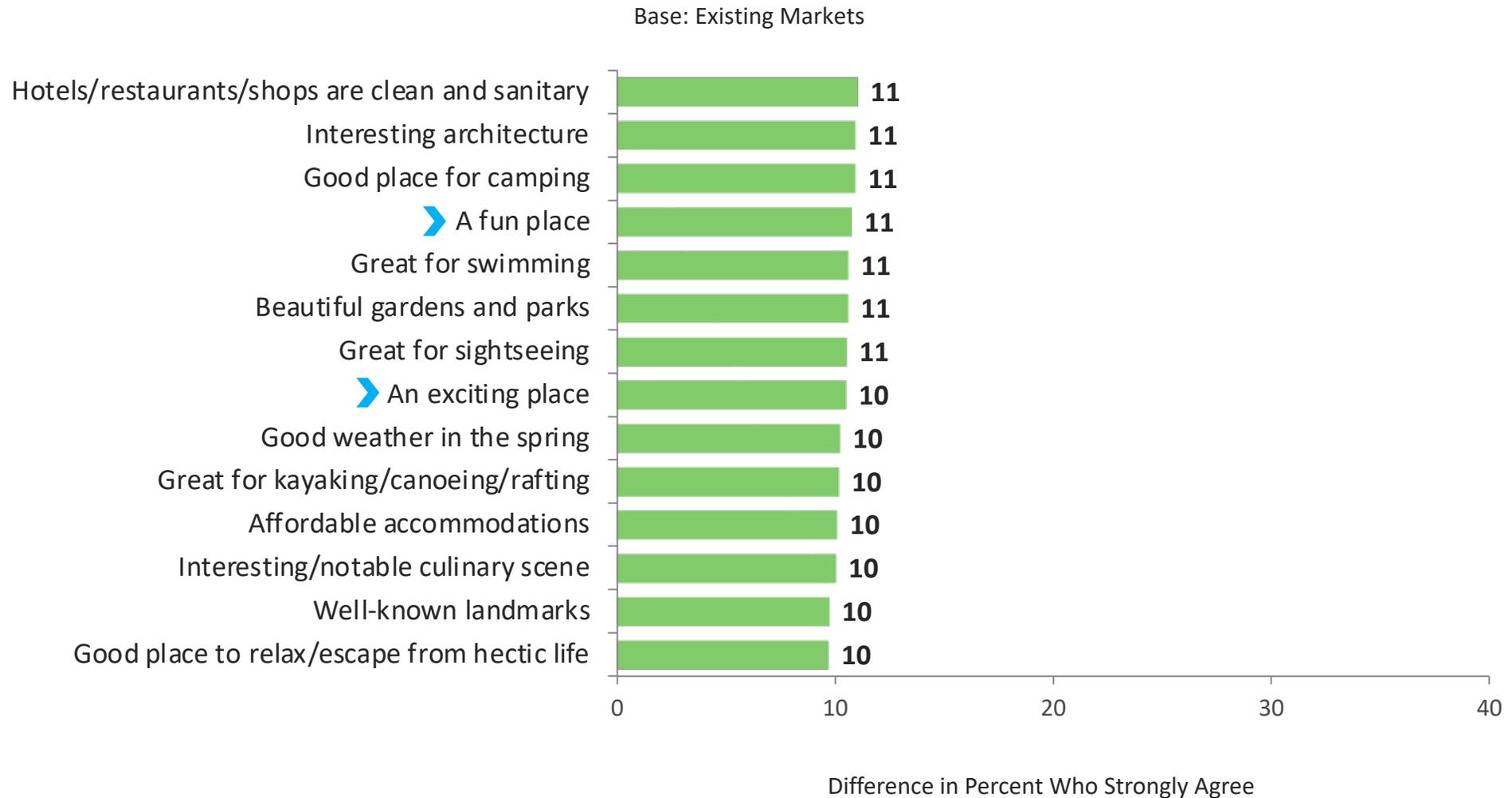
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Top Product Strengths vs. Image – Existing Markets (Cont'd)



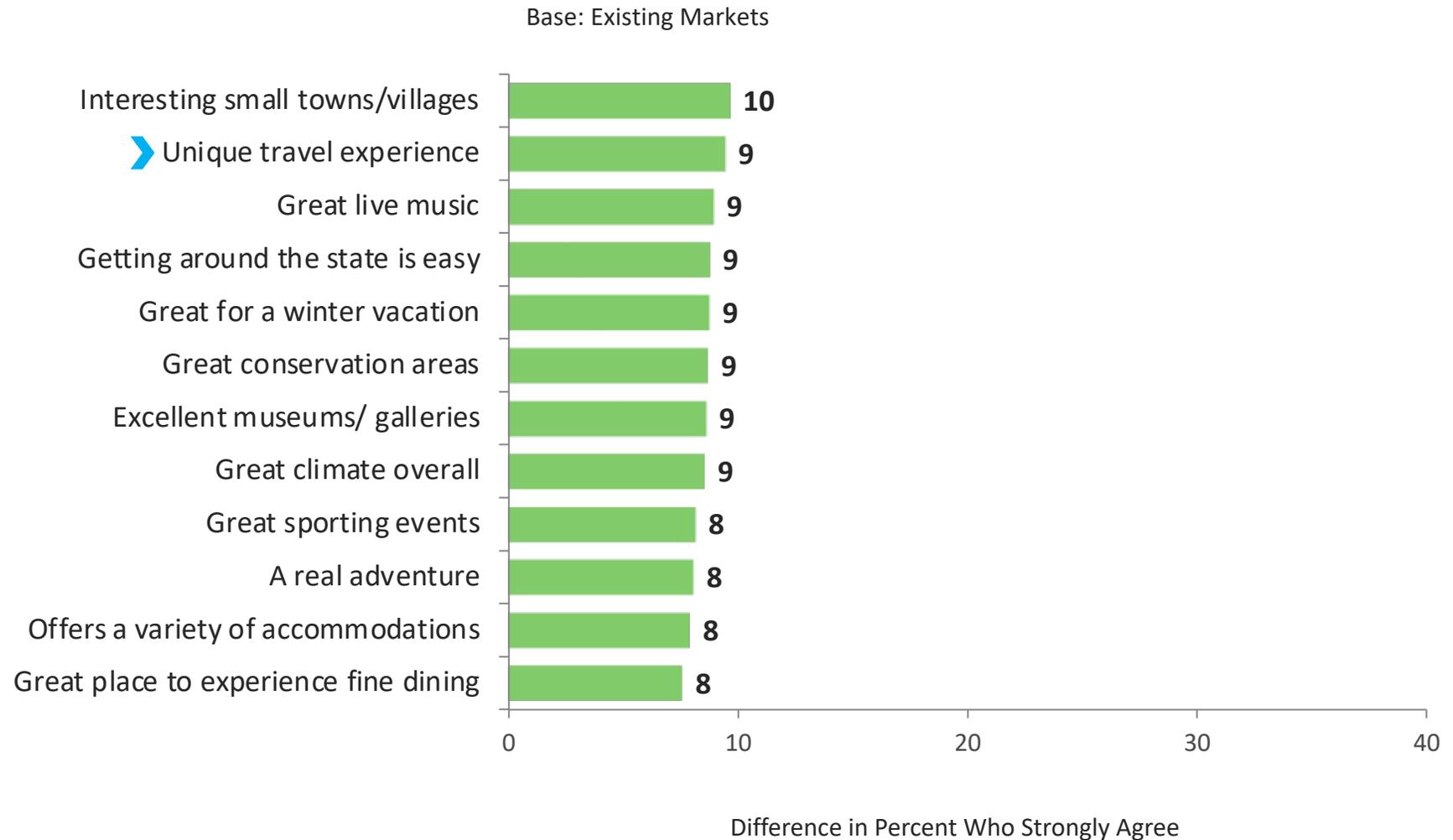
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Top Product Strengths vs. Image – Existing Markets (Cont'd)



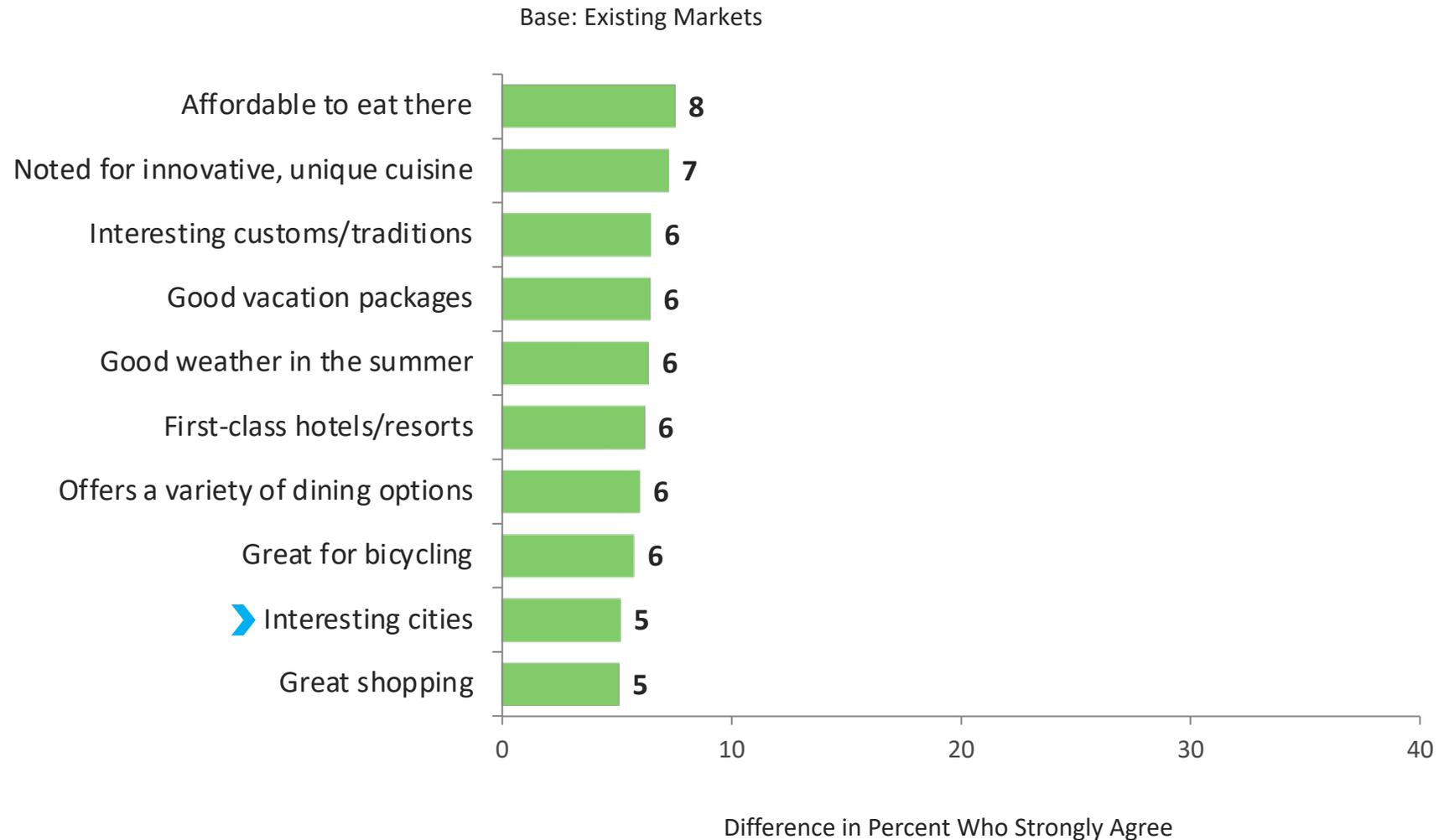
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Top Product Strengths vs. Image – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

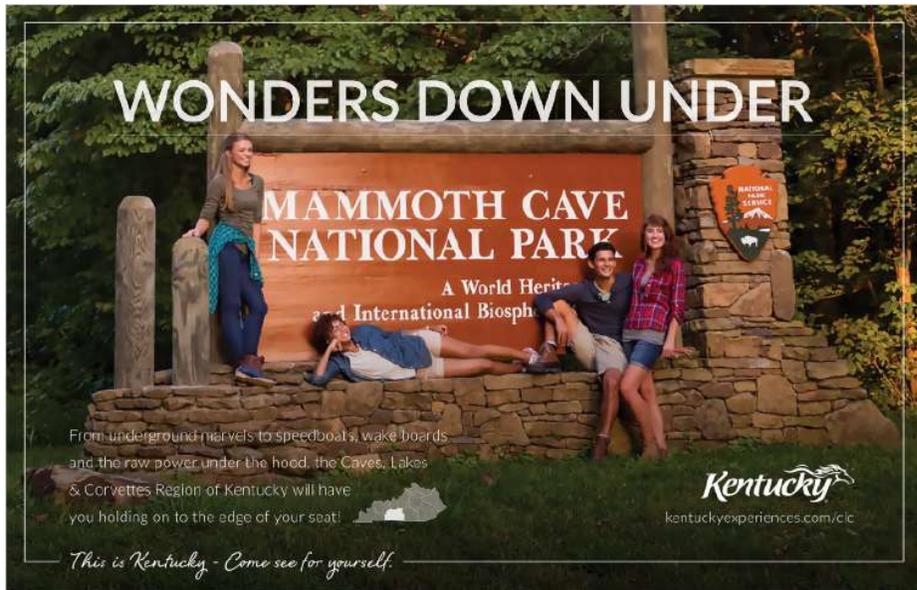
Top Product Strengths vs. Image – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Weaknesses vs. Image – Existing Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



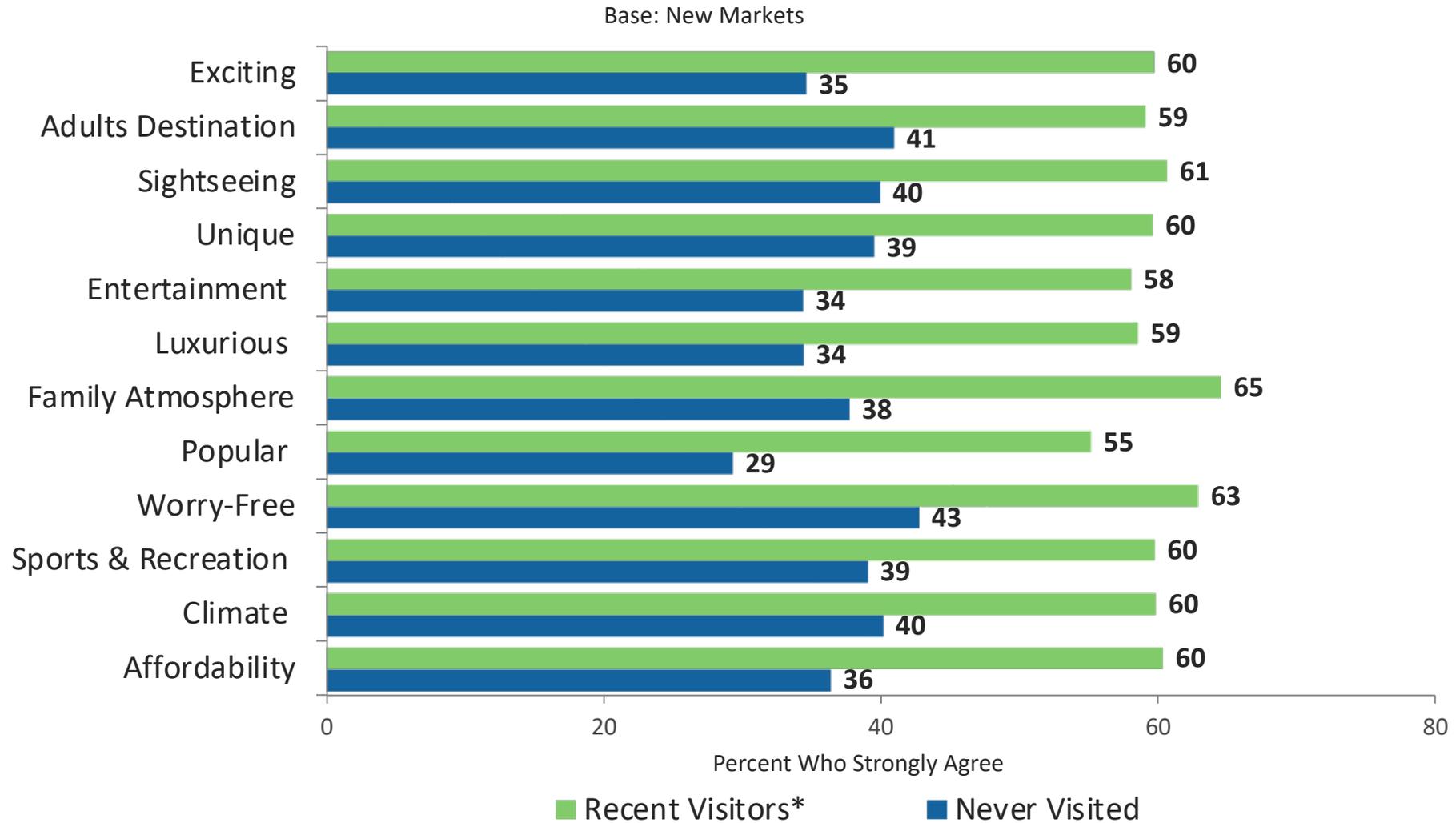
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Kentucky's Product Delivery - New Markets

Product Delivery – New Markets

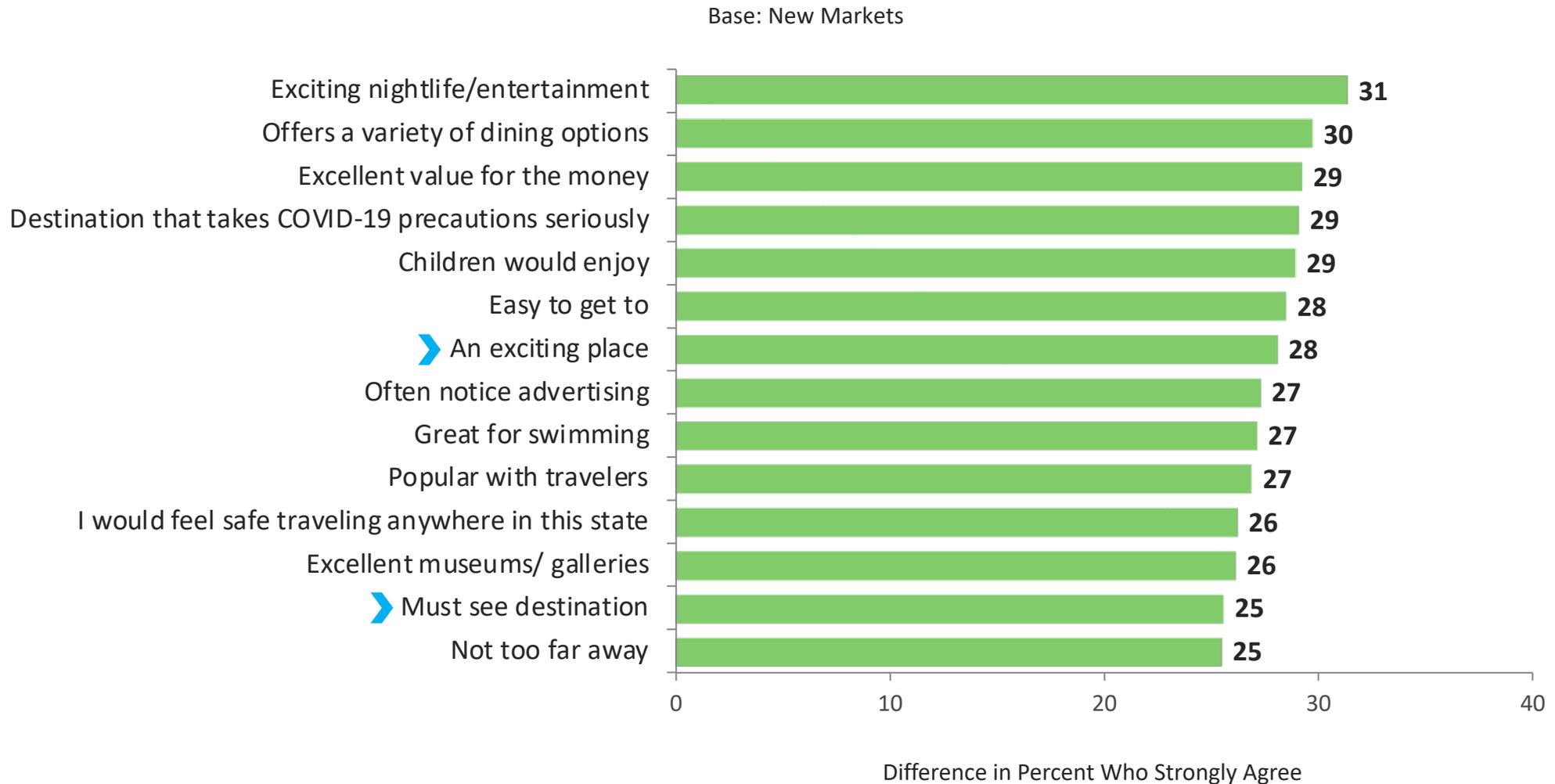
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- From this analysis we find that recent visitation from the state’s new markets positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study, with the following having a lift of over 21 points:
 - An exciting place
 - Must see destination
 - A fun place
 - First class hotels/resorts
 - A real adventure
 - Lots of things to see and do
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

Kentucky's Product vs. Image – New Markets



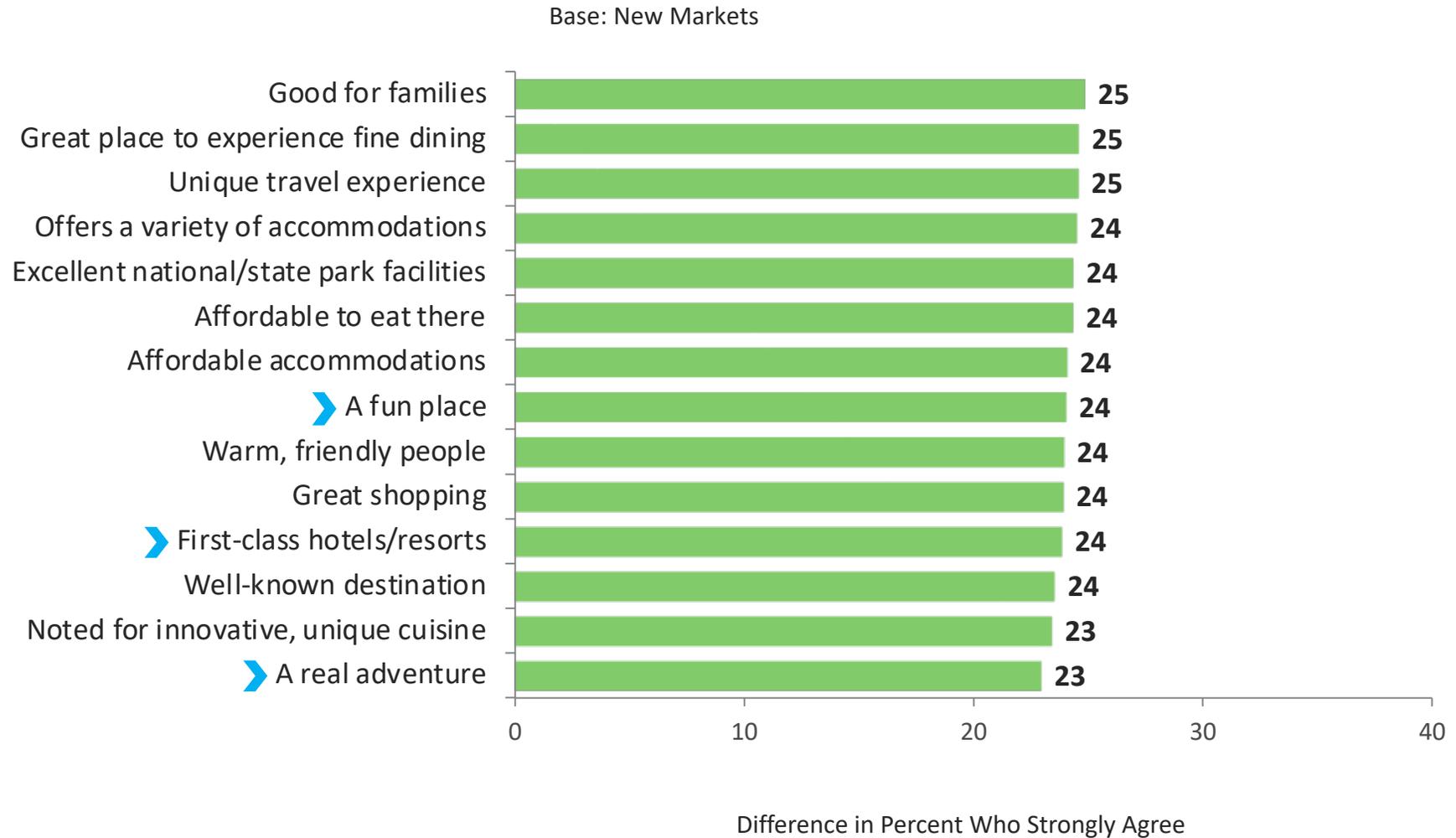
* Visited in the past 2 years

Top Product Strengths vs. Image – New Markets



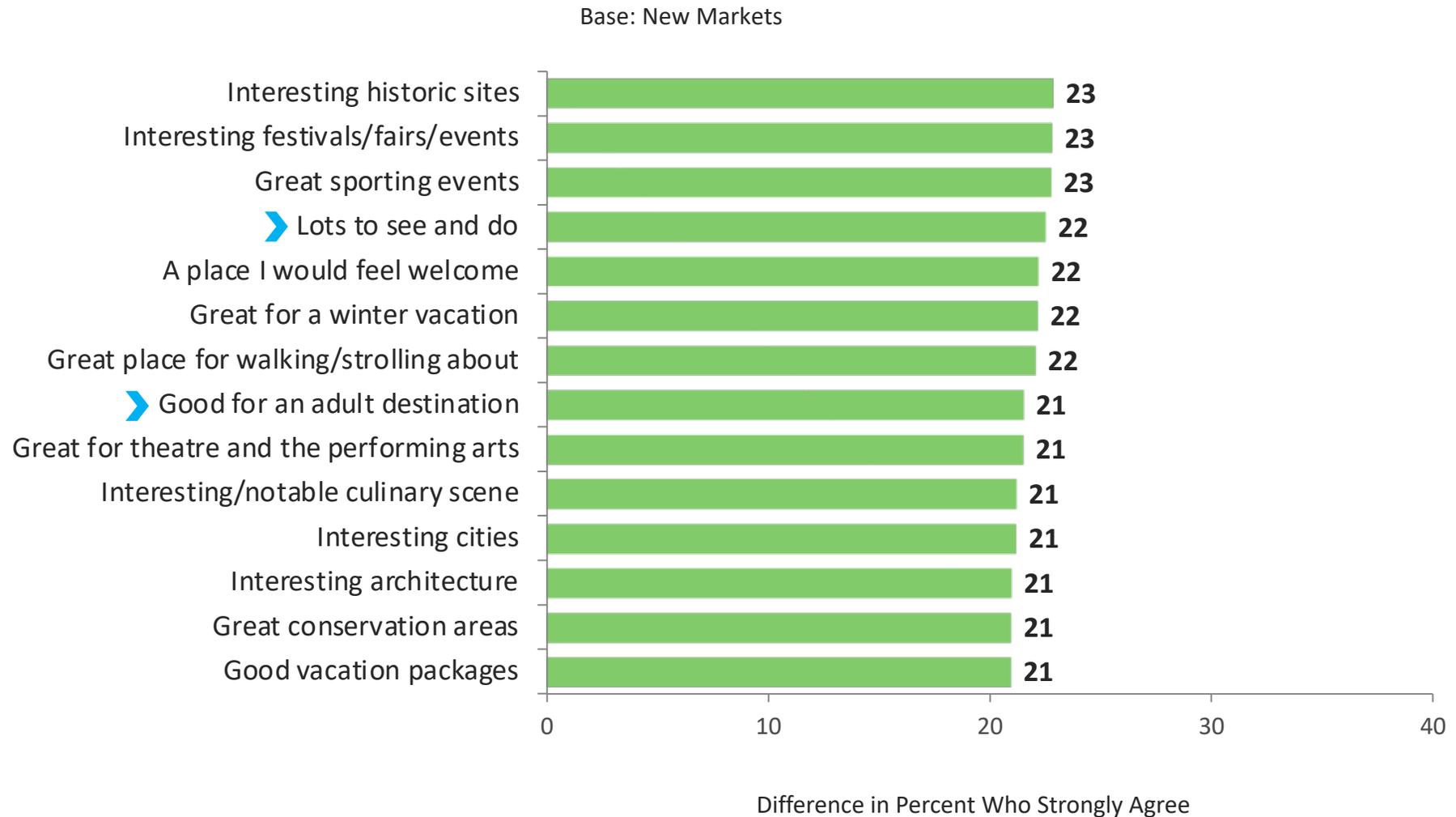
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Top Product Strengths vs. Image – New Markets (Cont'd)



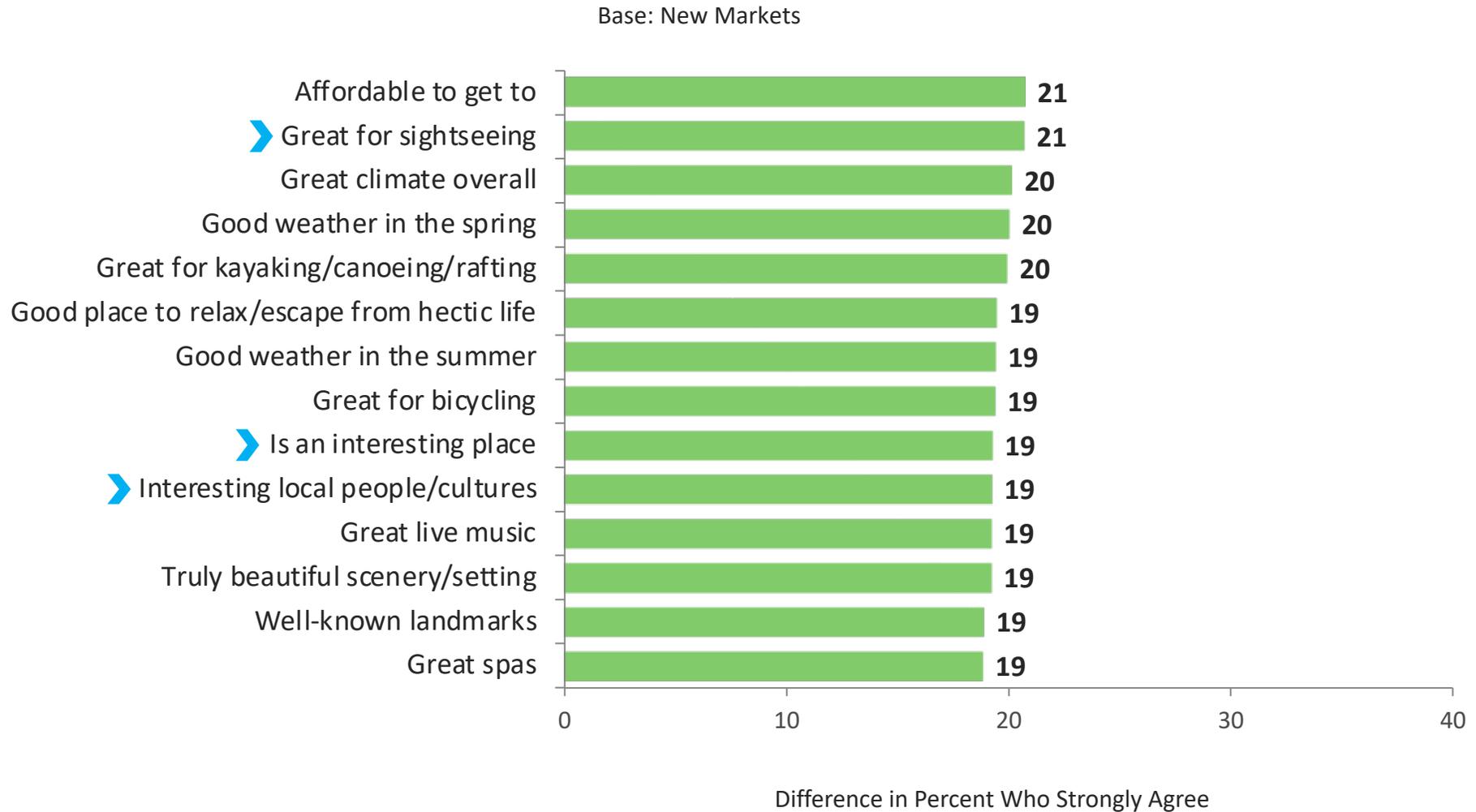
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image – New Markets (Cont'd)



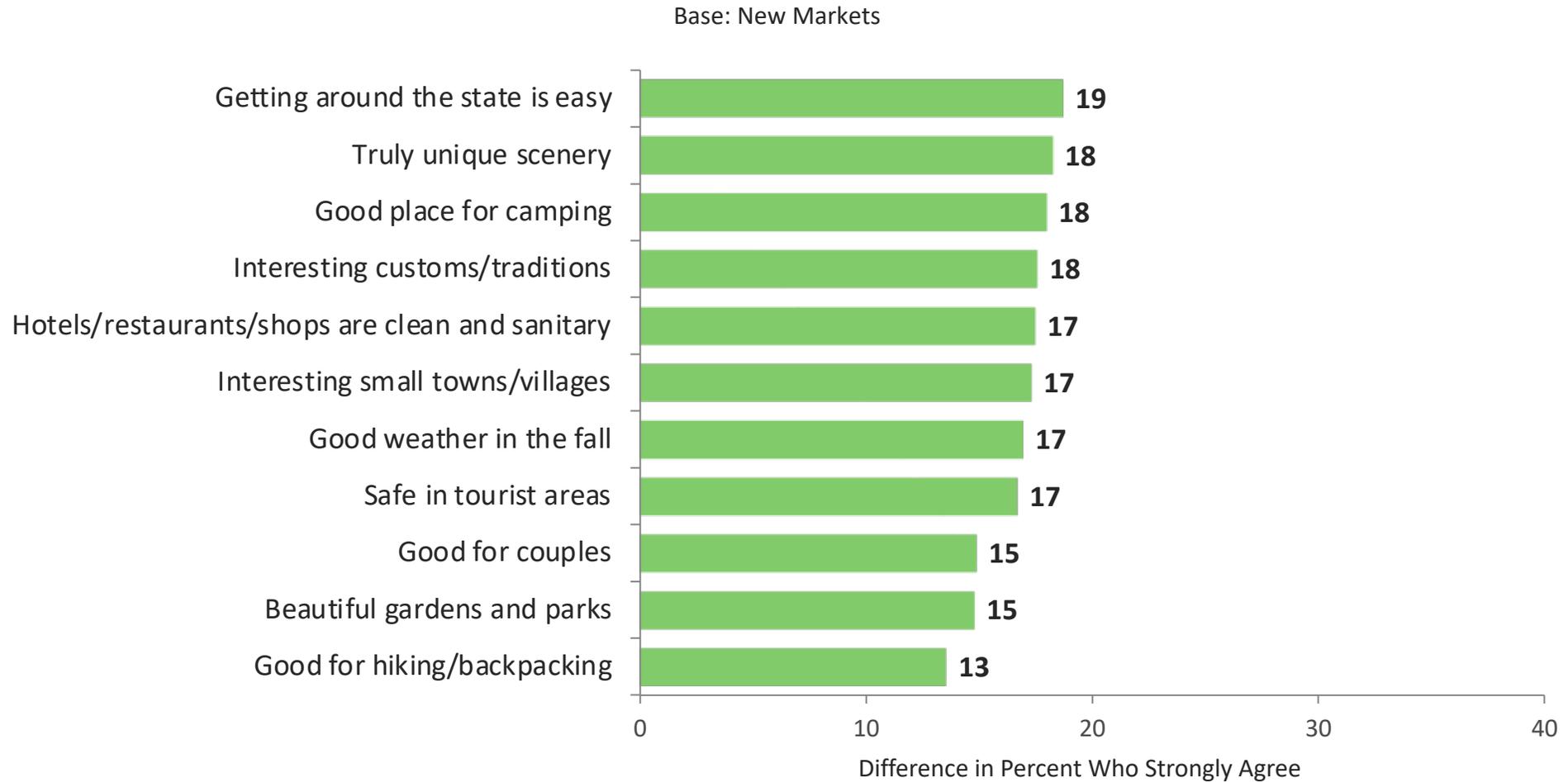
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image – New Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image – New Markets (Cont'd)



Top Product Weaknesses vs. Image – New Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



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**Halo Effect on
Economic
Development
Image**

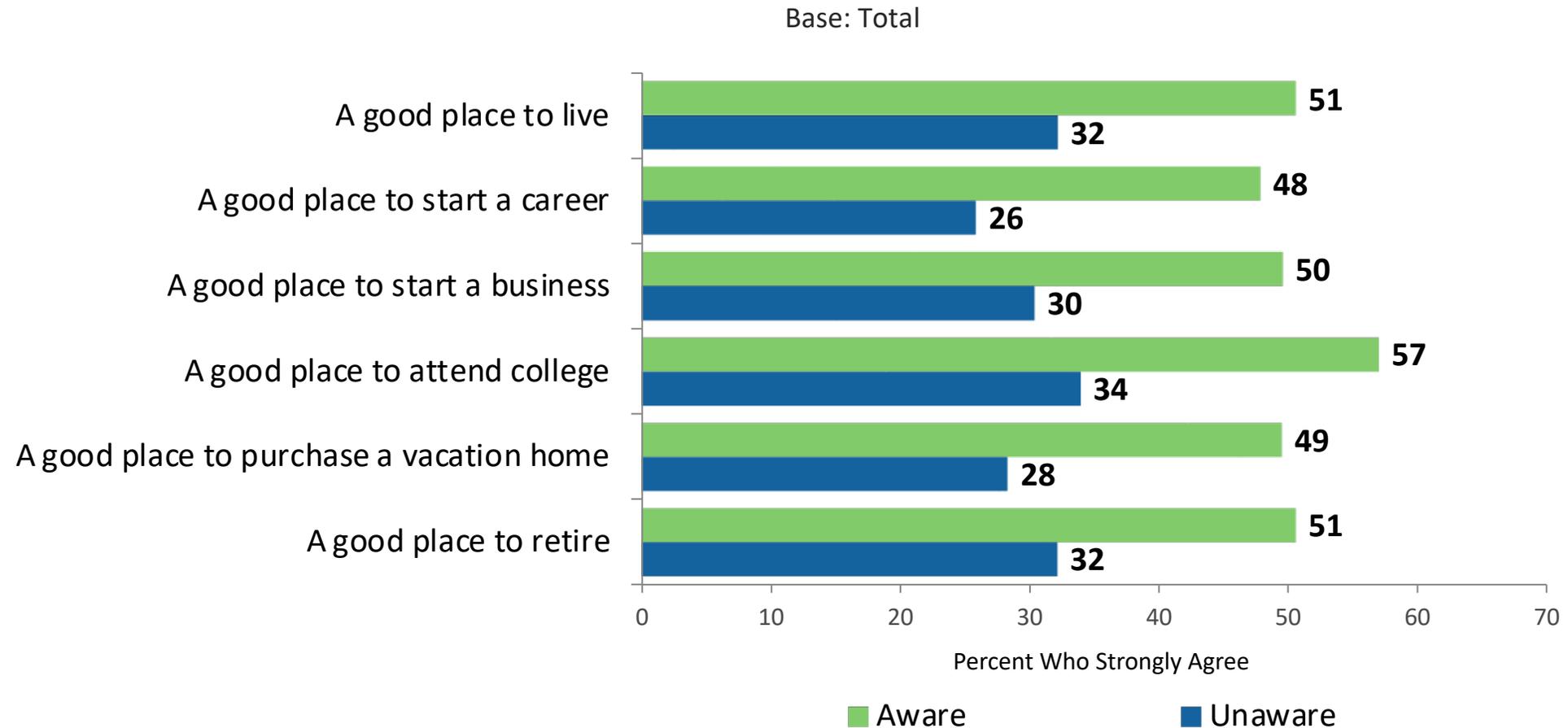
Halo Effect Analysis

- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for Kentucky from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing Kentucky more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?
- Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.
- The research compared out-of-state consumers' ratings of Kentucky on economic development image attributes by those who had not seen the campaign or visited Kentucky with those who did see the tourism ads and/or visited.
- Looking at the total advertising markets, in every case, Kentucky's tourism advertising significantly improved the image of Kentucky for a wide range of economic development objectives. Out-of-state travelers who saw the advertising rated Kentucky higher on all the economic development indicators included in the study.

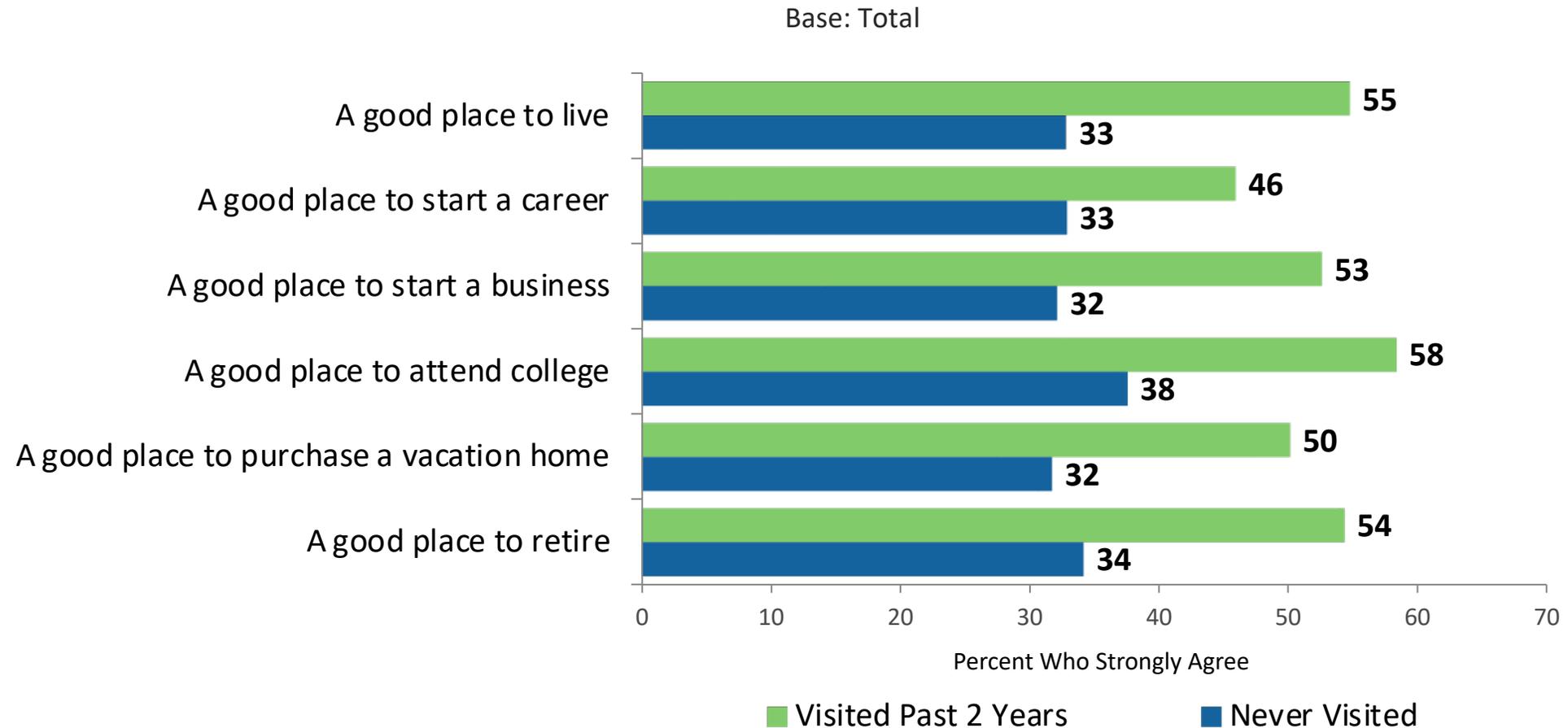
Halo Effect Analysis (Cont.)

- Visitation significantly improved the image of Kentucky for all variables as well.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Kentucky. On all attributes measured, more of those who saw the advertising and visited the state rated Kentucky higher across these economic development indicators.
- New markets saw a more pronounced halo effect lift than existing markets:
 - Both new and existing markets showed that Kentucky's tourism advertising significantly improved the state's image across the full range of economic development objectives included in the study. However, that lift was stronger in new markets.
 - Among out-of-state travelers in the new markets, visitation lifted Kentucky's image significantly across all economic development objectives included in the study. For existing markets, that lift as limited to four of the five variables: a good place to retire, attend college, live, purchasing a vacation home, and start a business.
 - Looking at the combined lift of advertising awareness and visitation, again both new and existing markets, there was a significant lift across all economic impact variables included in the study. However, new markets recorded a far larger lift than existing markets.

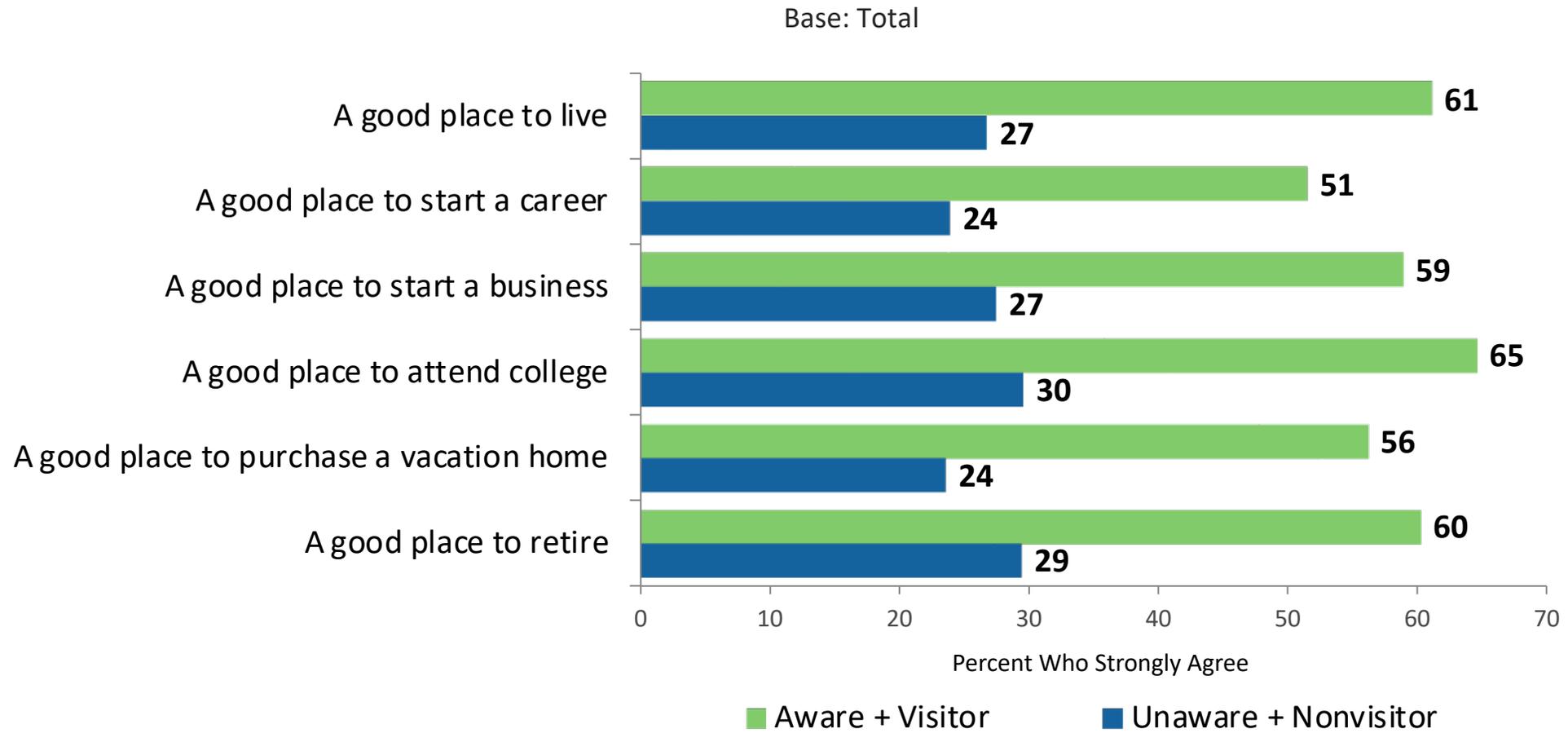
Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image – Total Markets



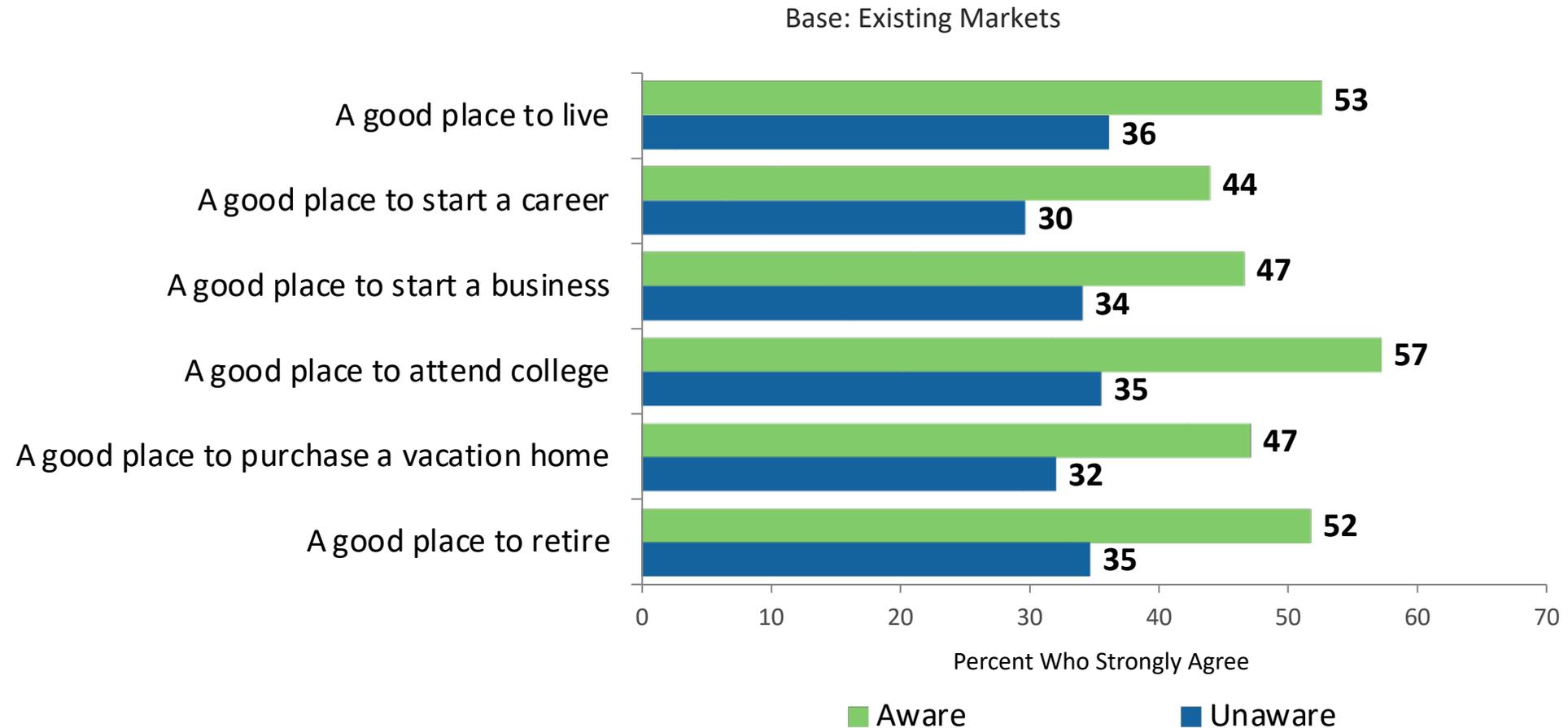
Impact of *Visitation* on Kentucky's Economic Development Image – Total Markets



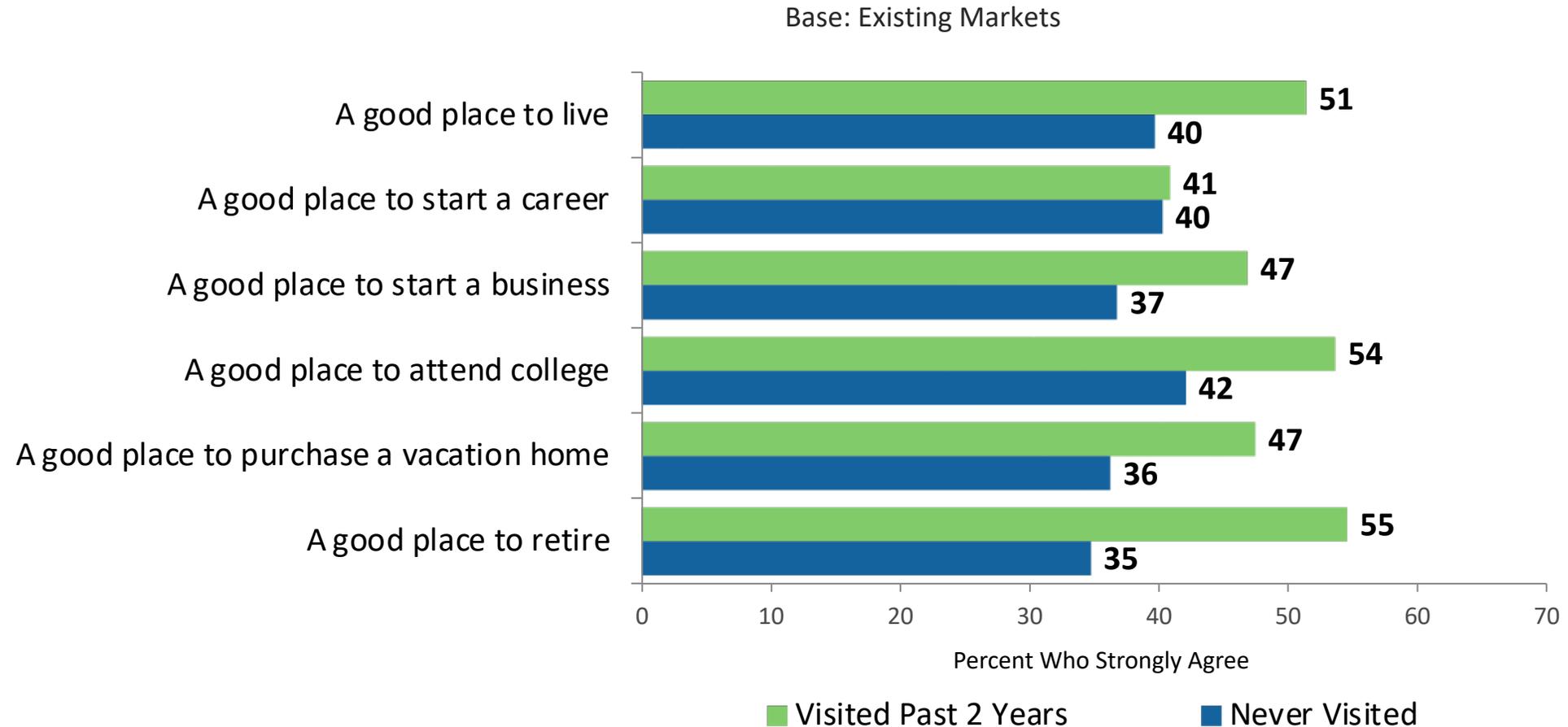
Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image – Total Markets



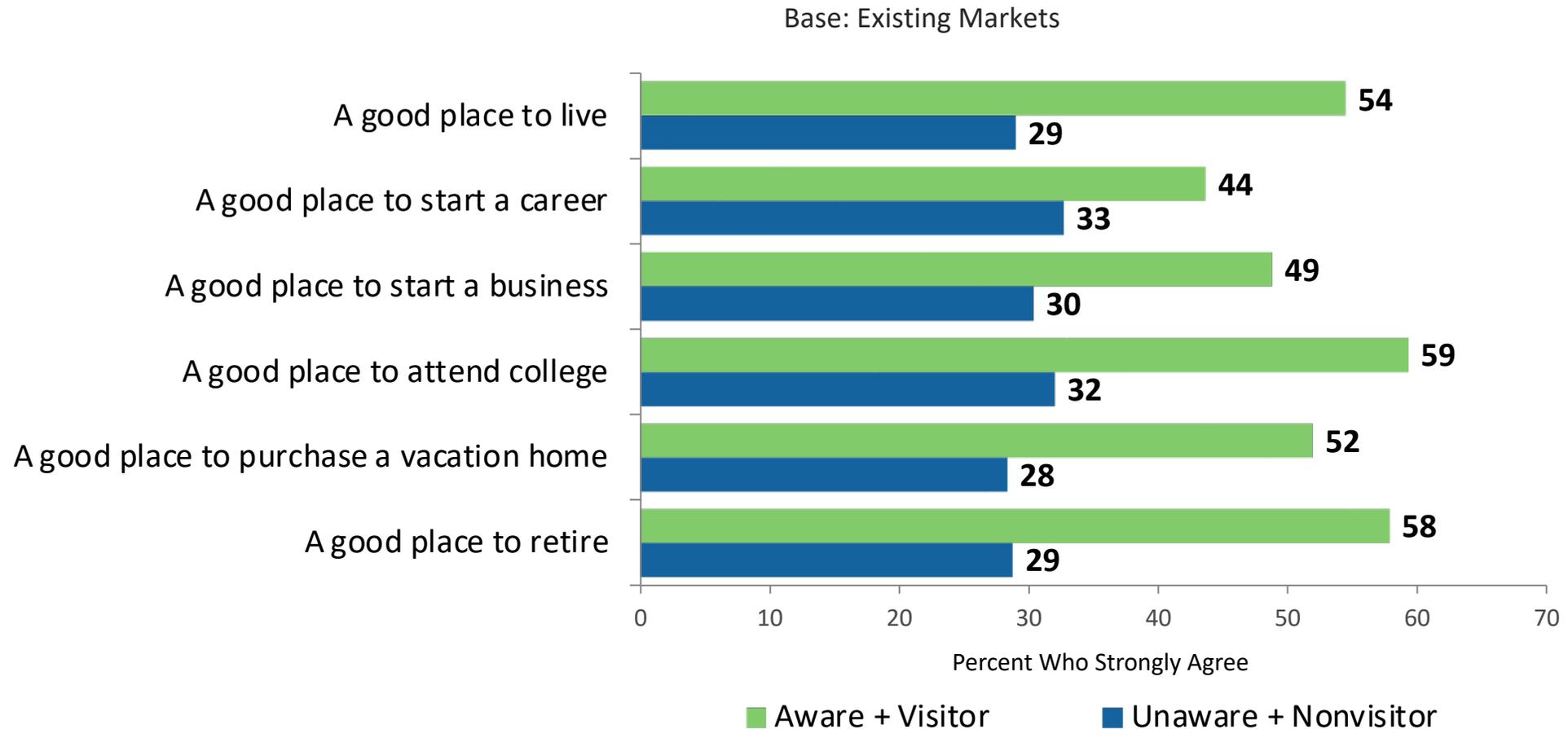
Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image – Existing Markets



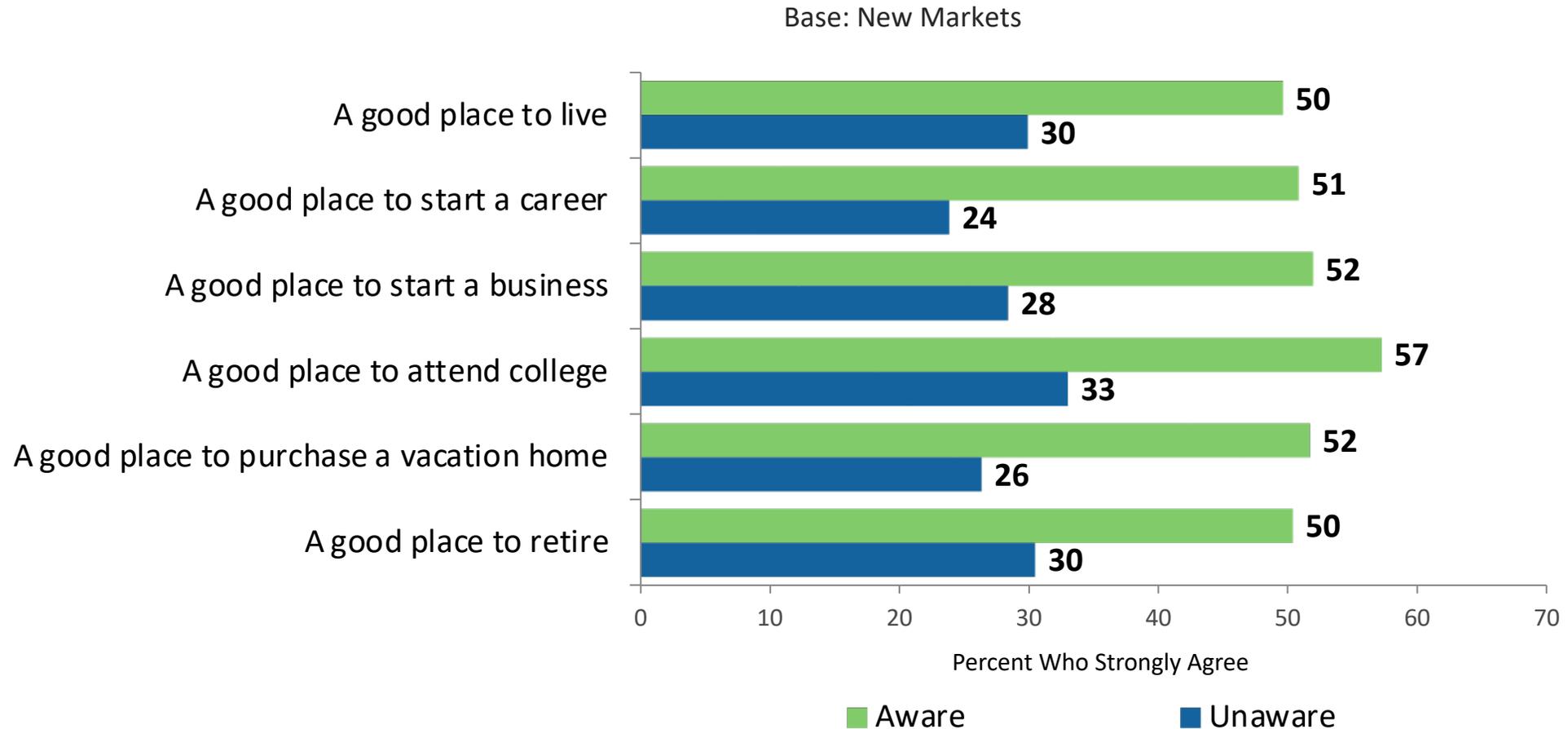
Impact of *Visitation* on Kentucky's Economic Development Image – Existing Markets



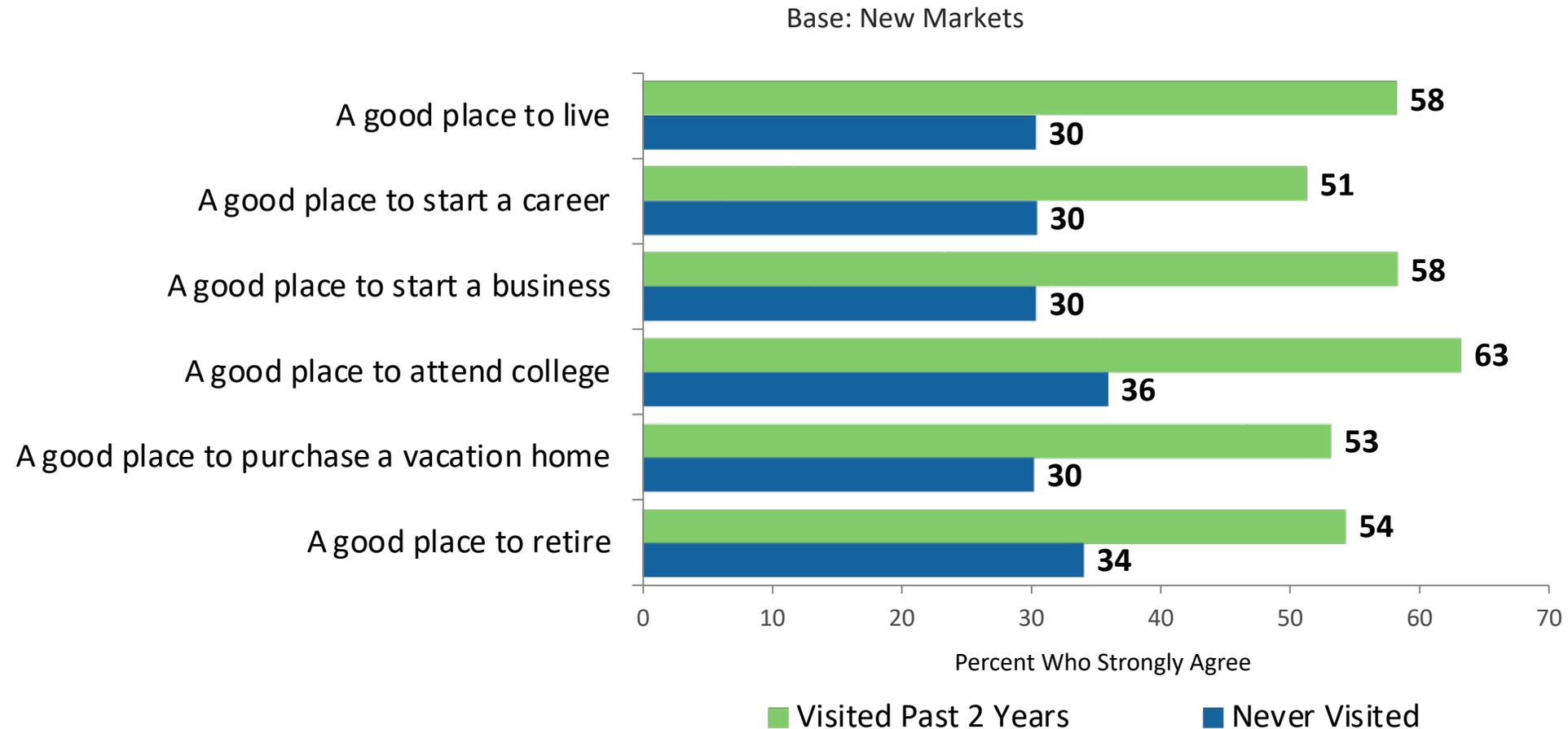
Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image – Existing Markets



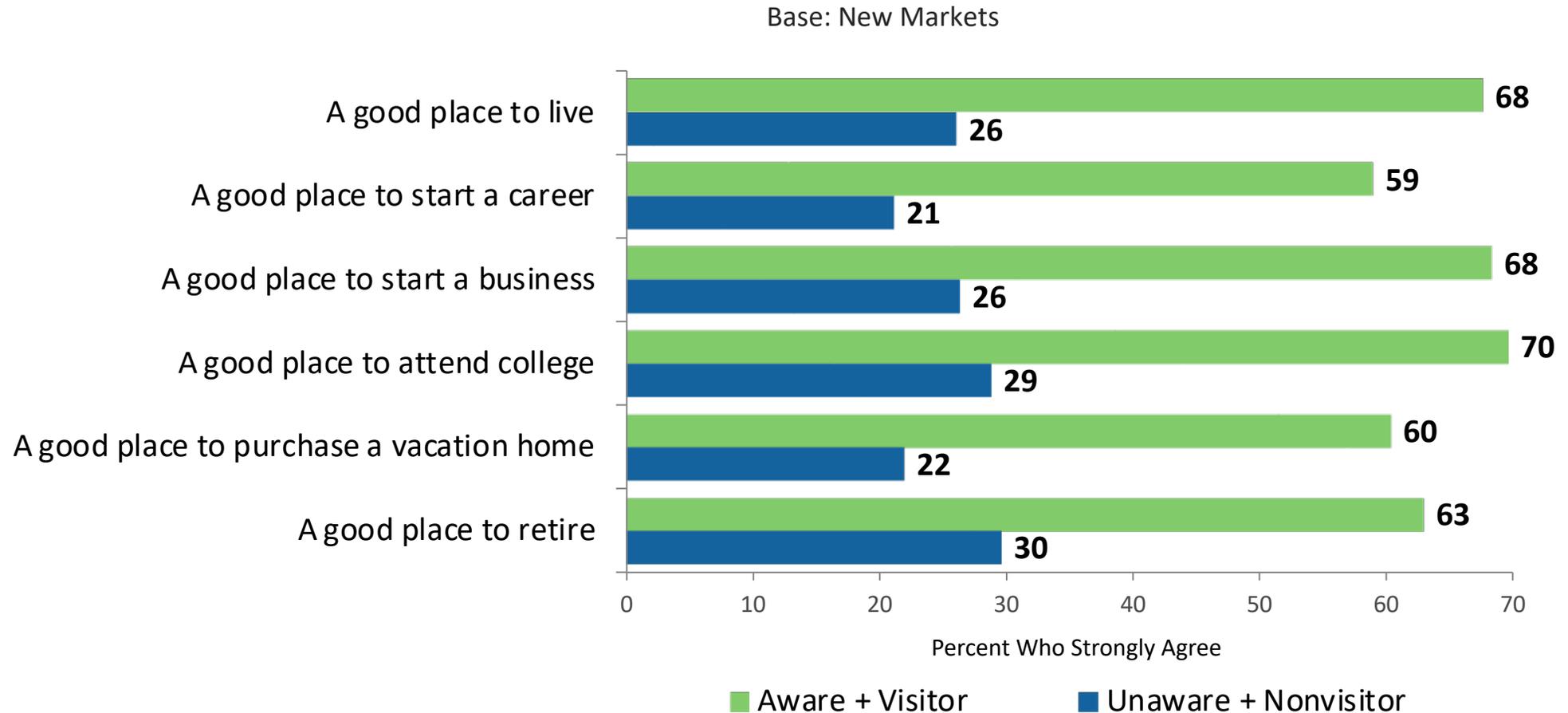
Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image – New Markets

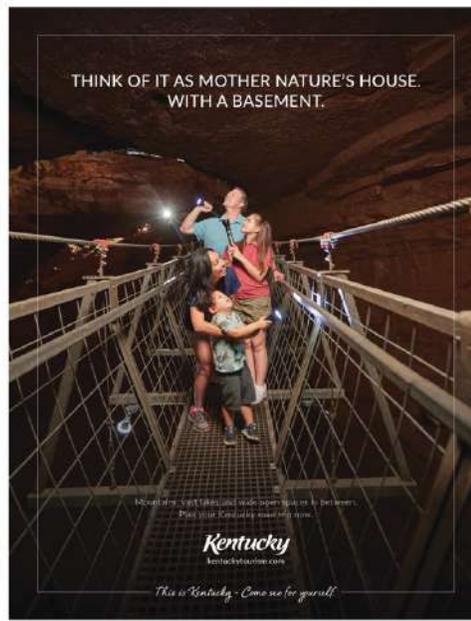


Impact of *Visitation* on Kentucky's Economic Development Image – New Markets



Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image – New Markets





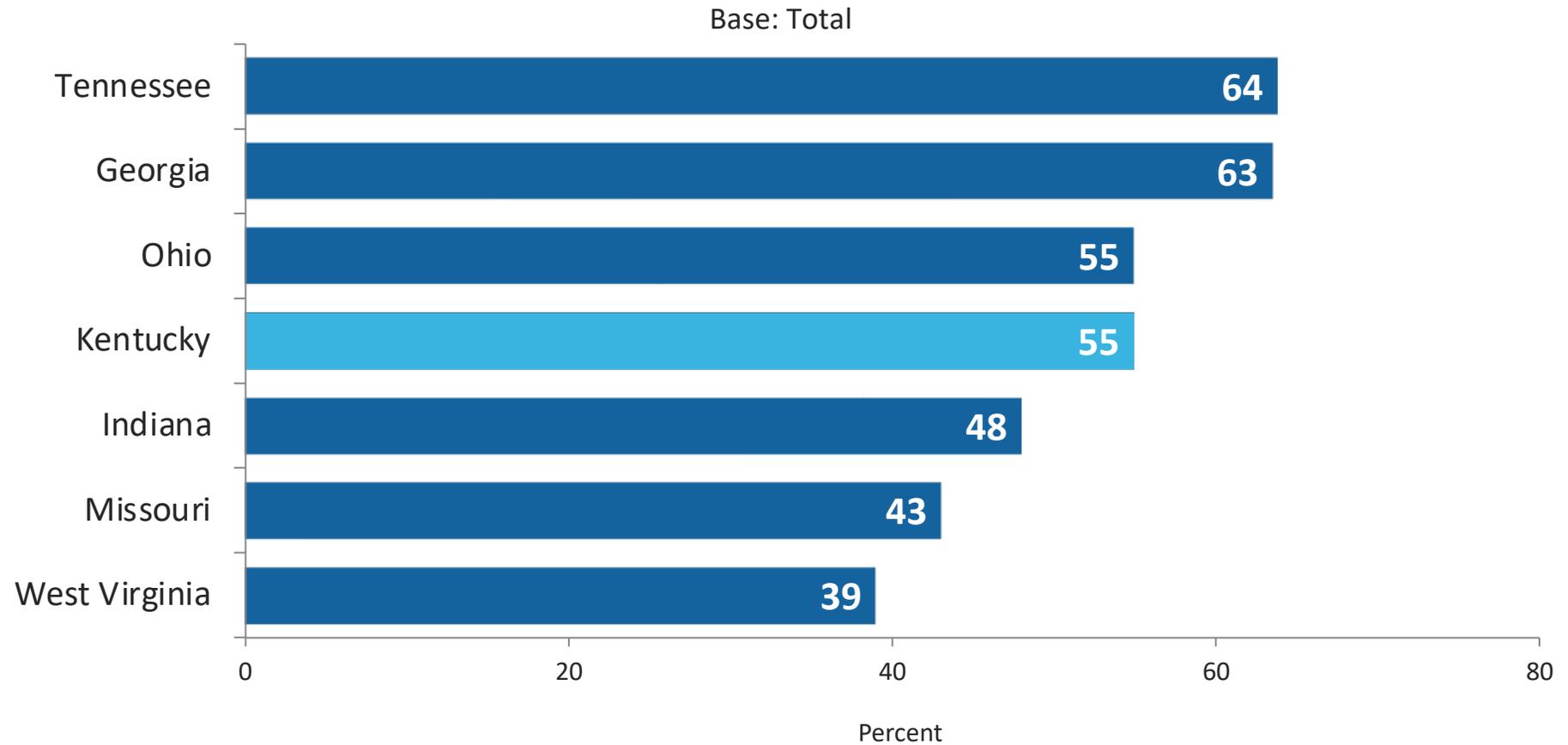
Longwoods
INTERNATIONAL

Destination Visitation & Interest

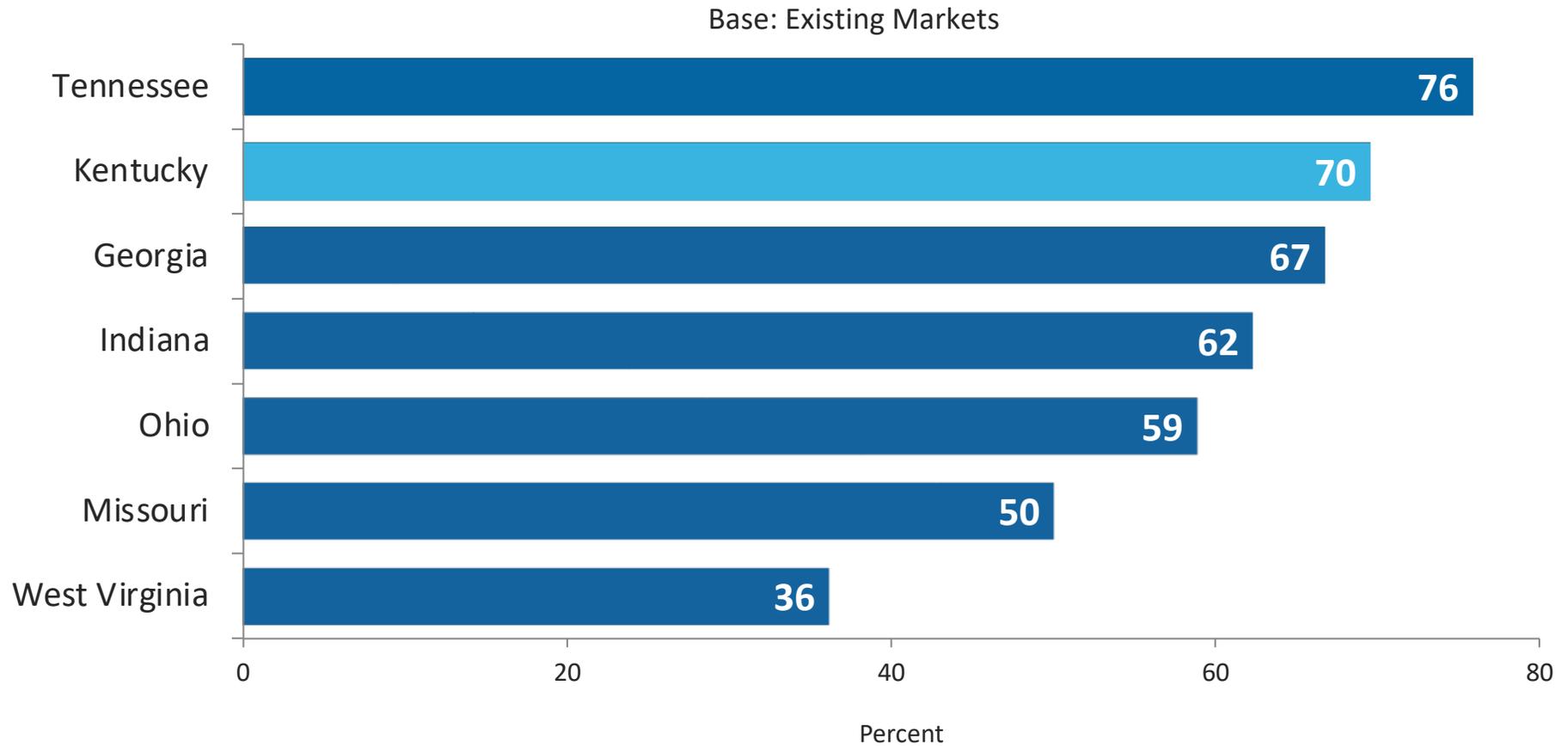
Destination Visitation & Intent

- Over half (55%) of travelers within the total advertising markets have visited Kentucky during their lifetimes. Seven in ten (70%) travelers in existing markets have visited, while less than half (44%) in new markets have.
- Three in ten (29%) of travelers within the total advertising markets have visited Kentucky during the past 2 years. Almost half (44%) of travelers residing in Kentucky's existing markets have visited in that timeframe, while only two in ten (20%) have done so residing in Kentucky's new markets.
- Four in ten (42%) of travelers within the total advertising markets intend to visit Kentucky during the next 12 months. Half (50%) of travelers within Kentucky's existing markets intend to visit, while only over one-third (36%) of travelers from existing markets intend on visiting.
- Among travelers who visited Kentucky overnight, the two most popular activities were shopping and trying unique/local foods.

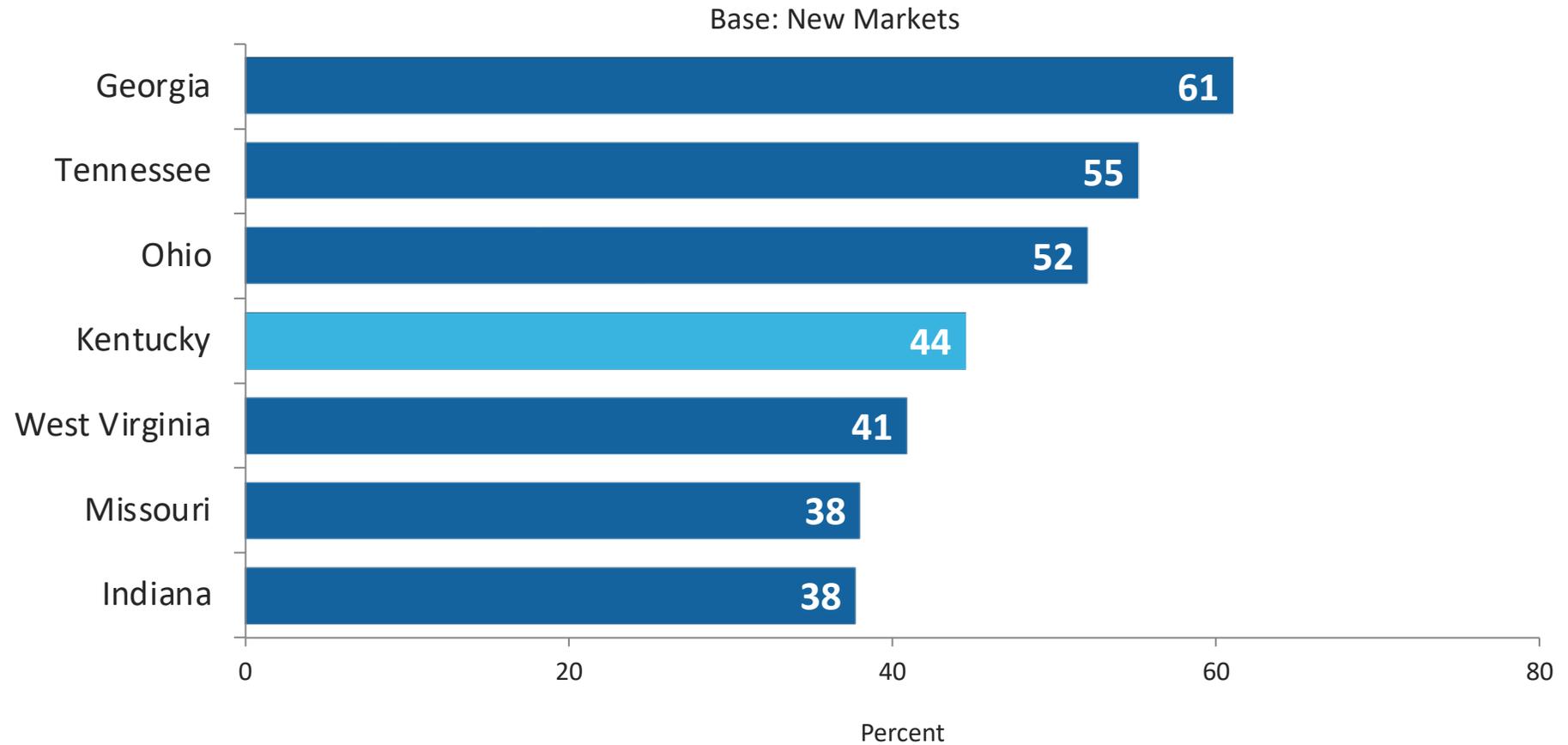
Destinations Ever Visited – Total Markets



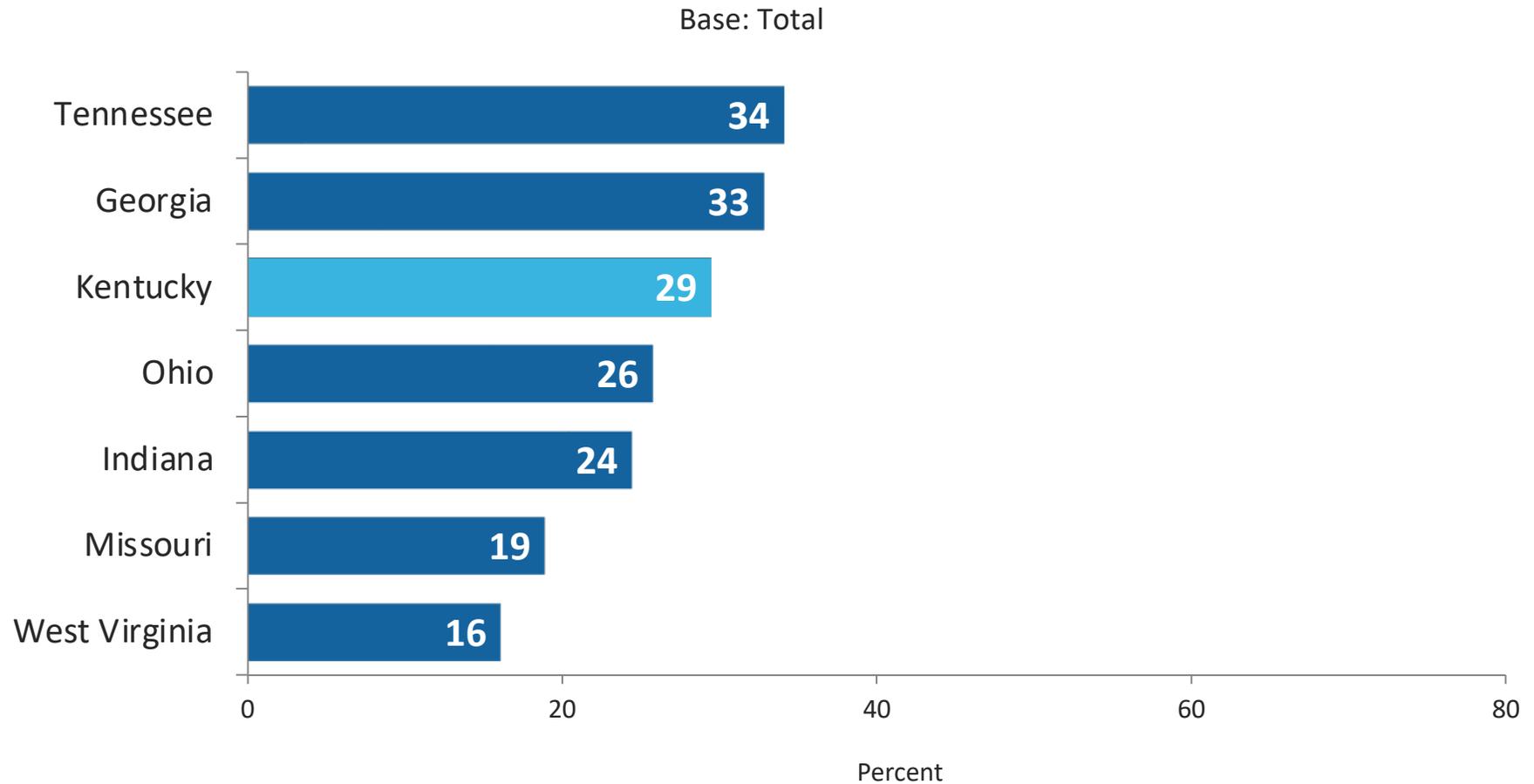
Destinations Ever Visited – Existing Markets



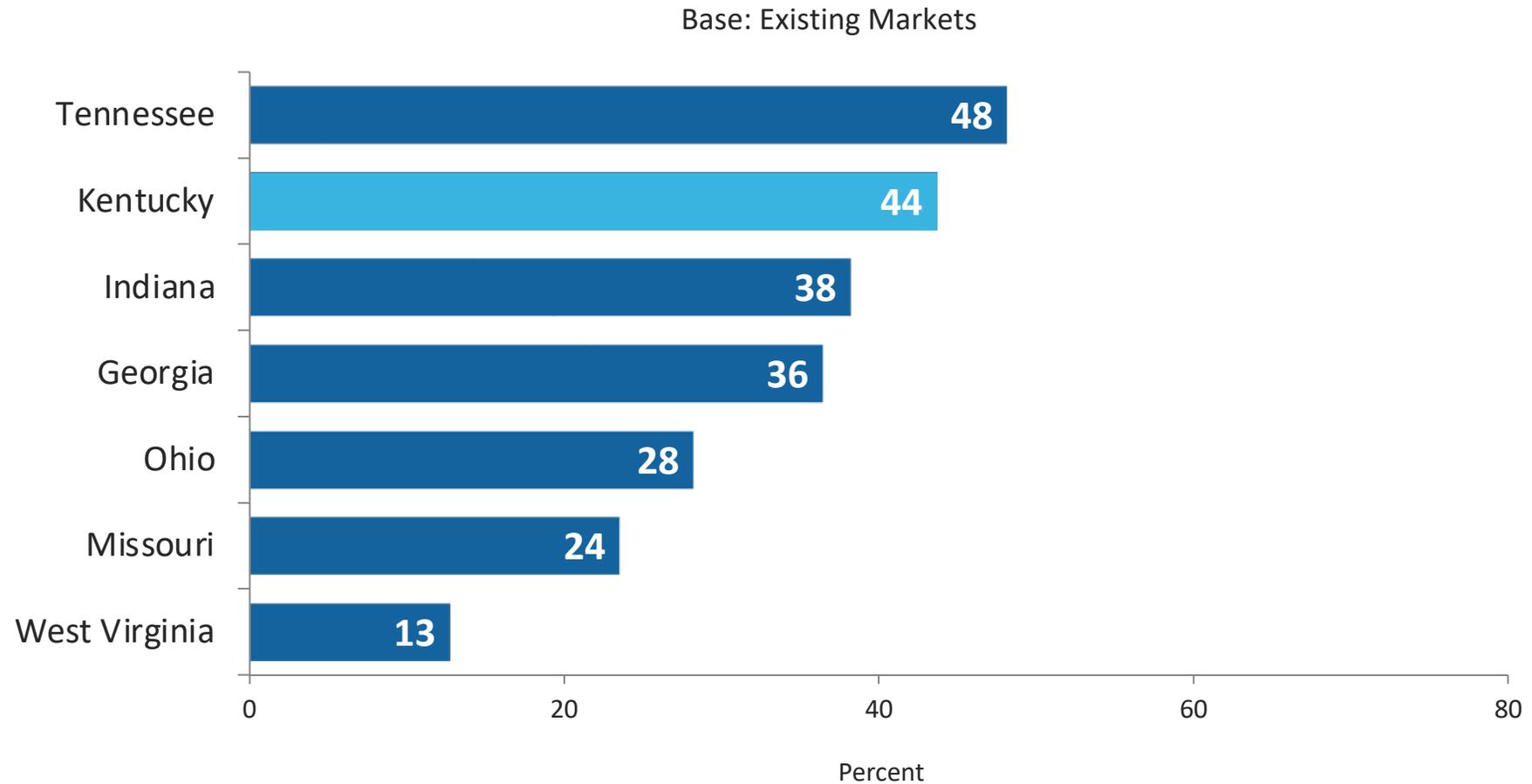
Destinations Ever Visited – New Markets



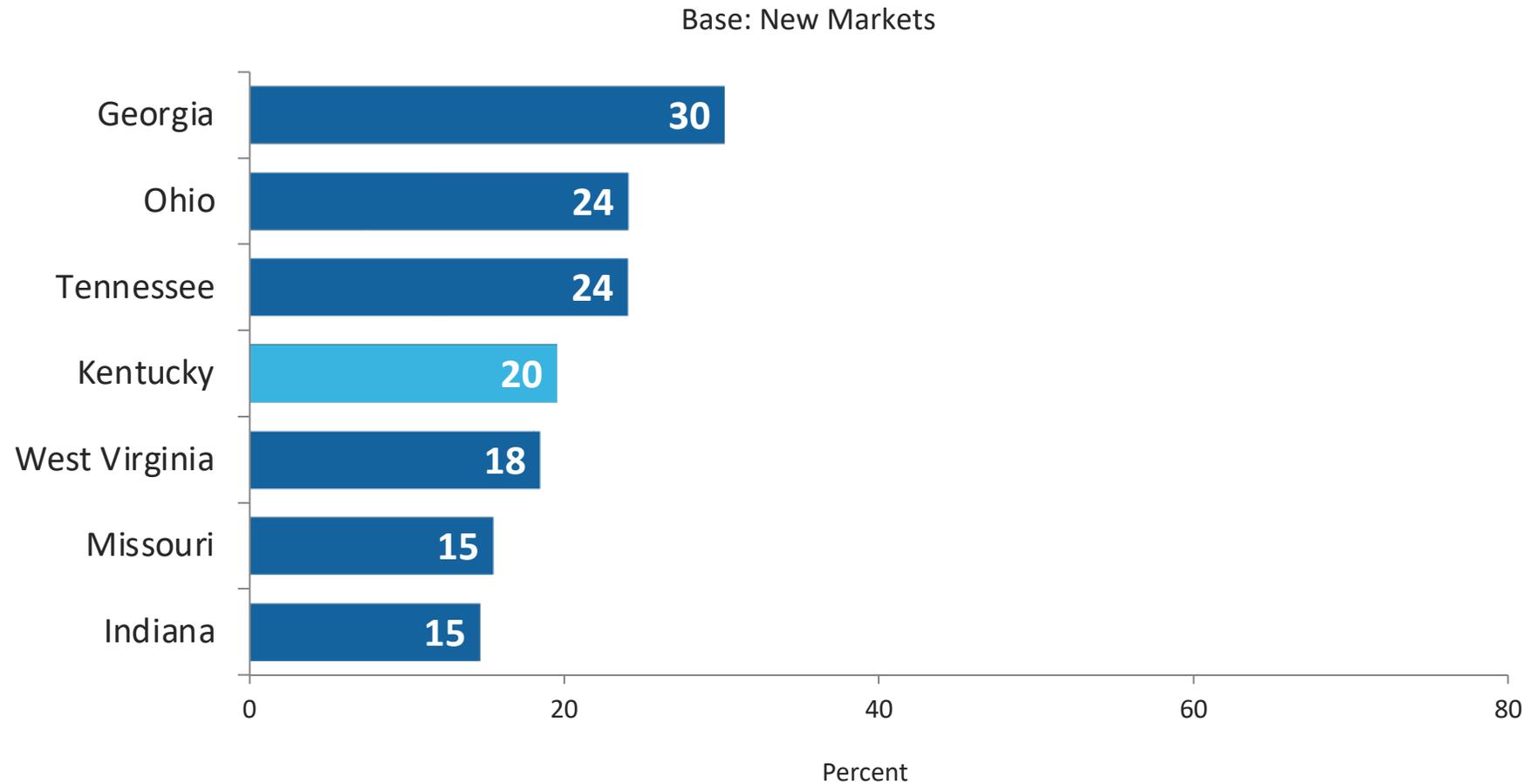
Destinations Visited in Past 2 Years – Total Markets



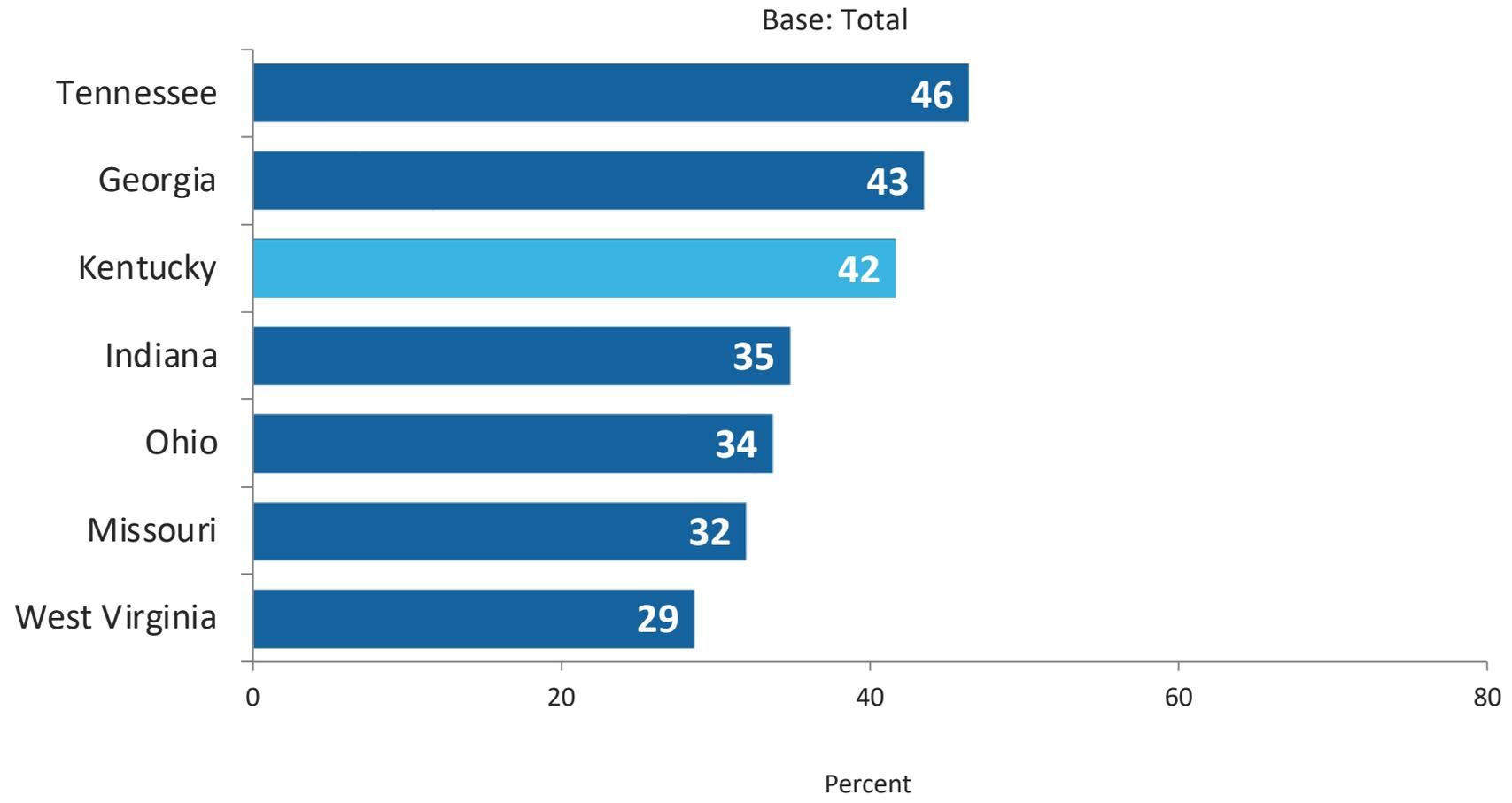
Destinations Visited in Past 2 Years – Existing Markets



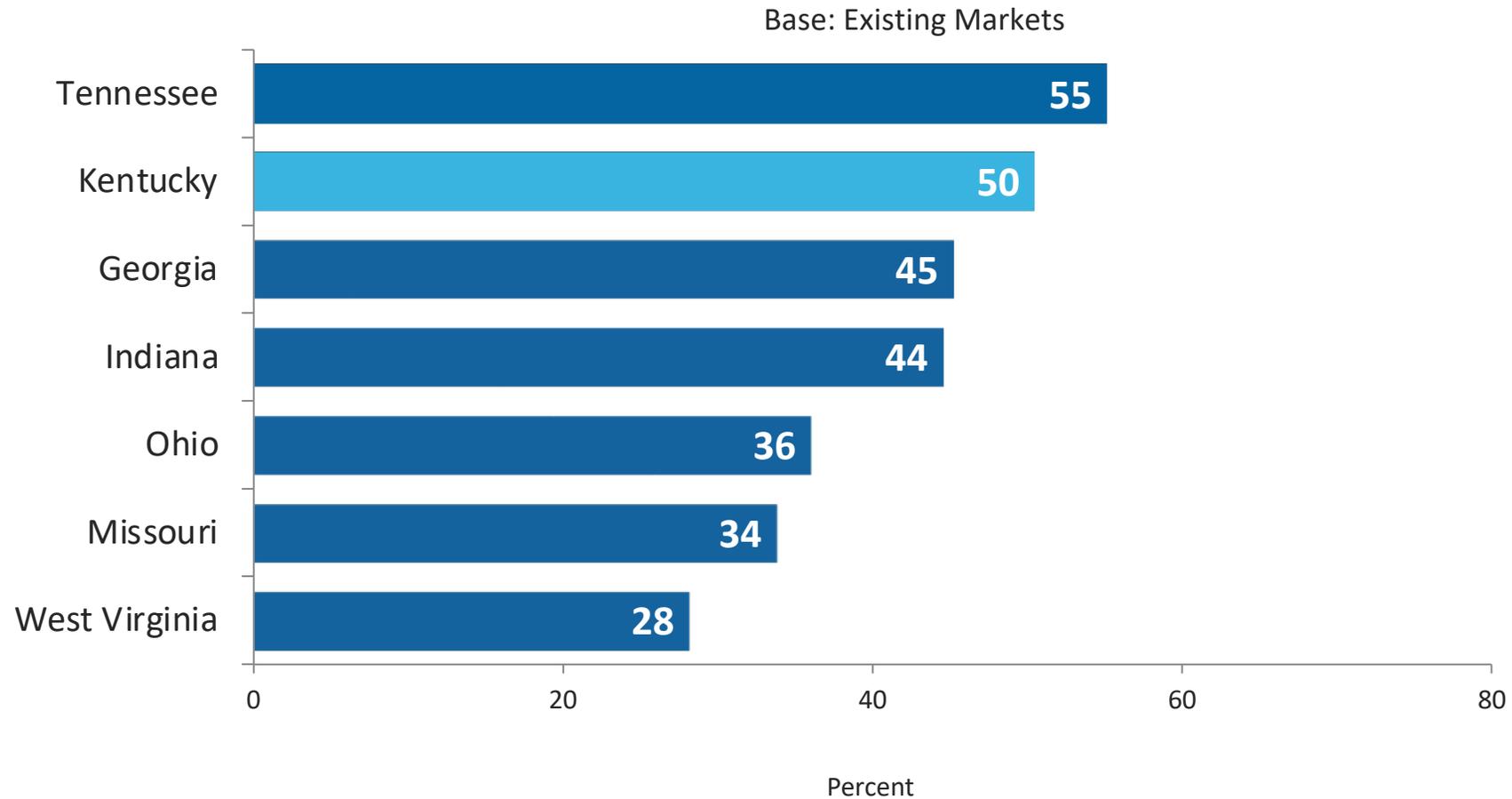
Destinations Visited in Past 2 Years – New Markets



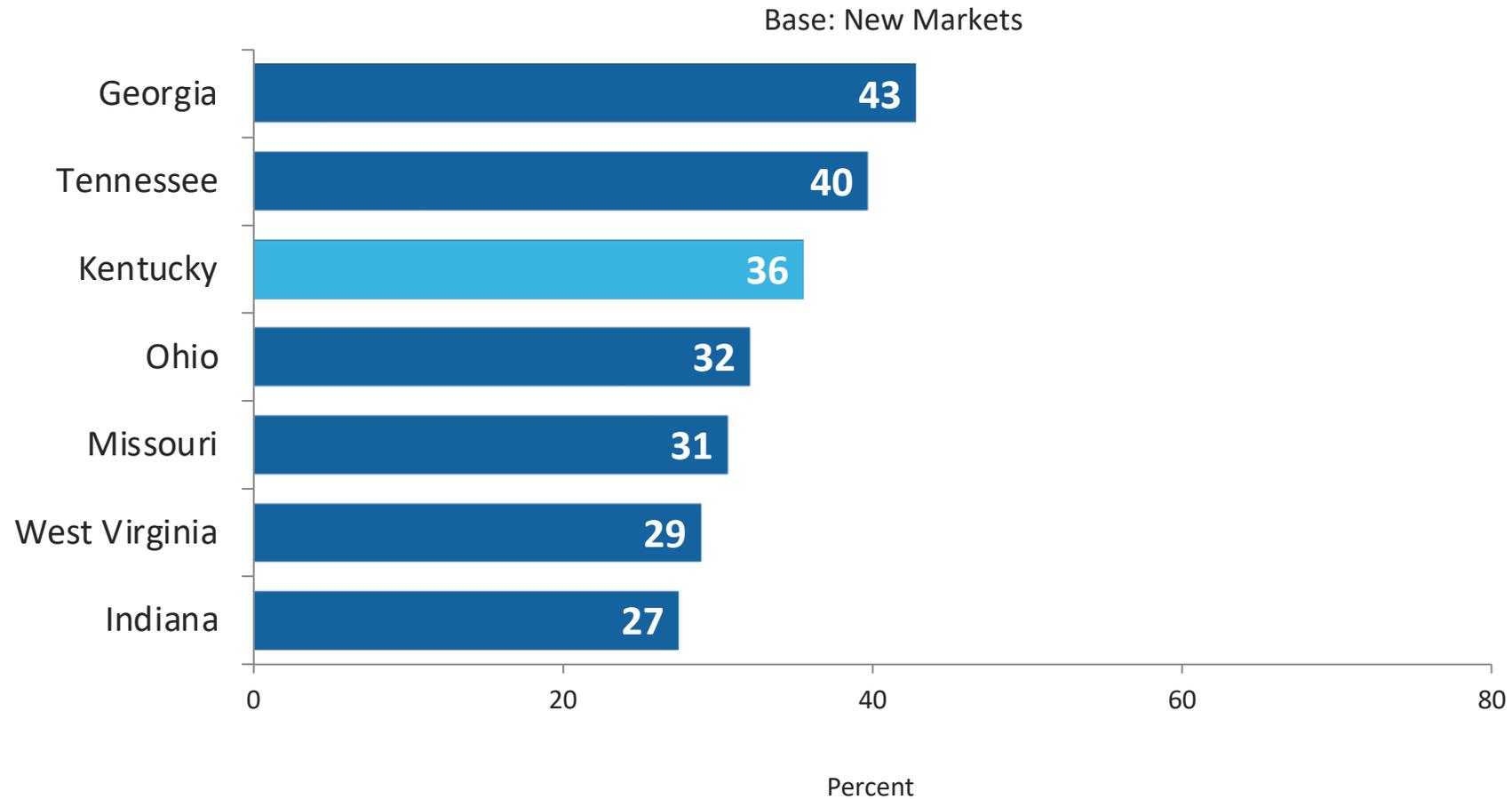
Destinations Intend to Visit in Next 12 Months – Total Markets



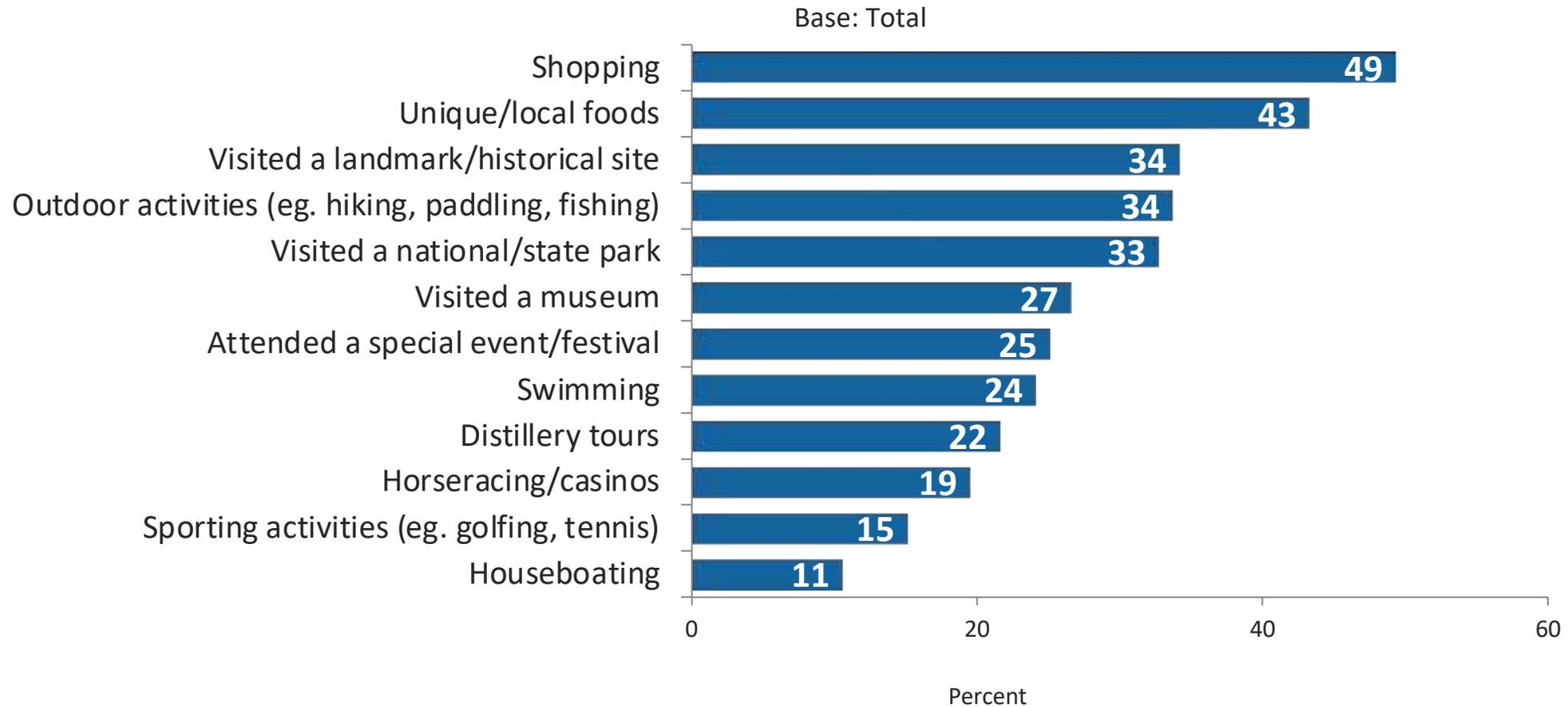
Destinations Intend to Visit in Next 12 Months – Existing Markets



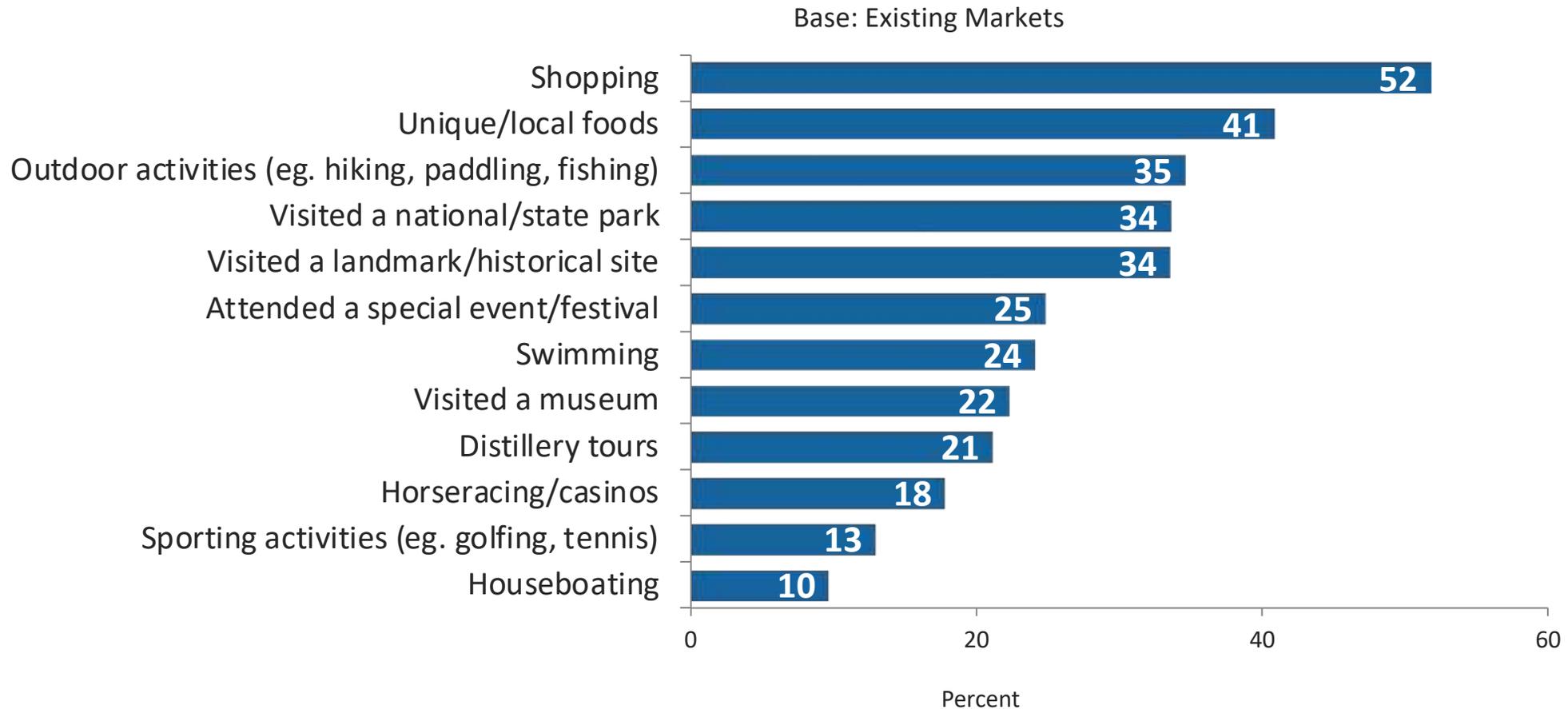
Destinations Intend to Visit in Next 12 Months – New Markets



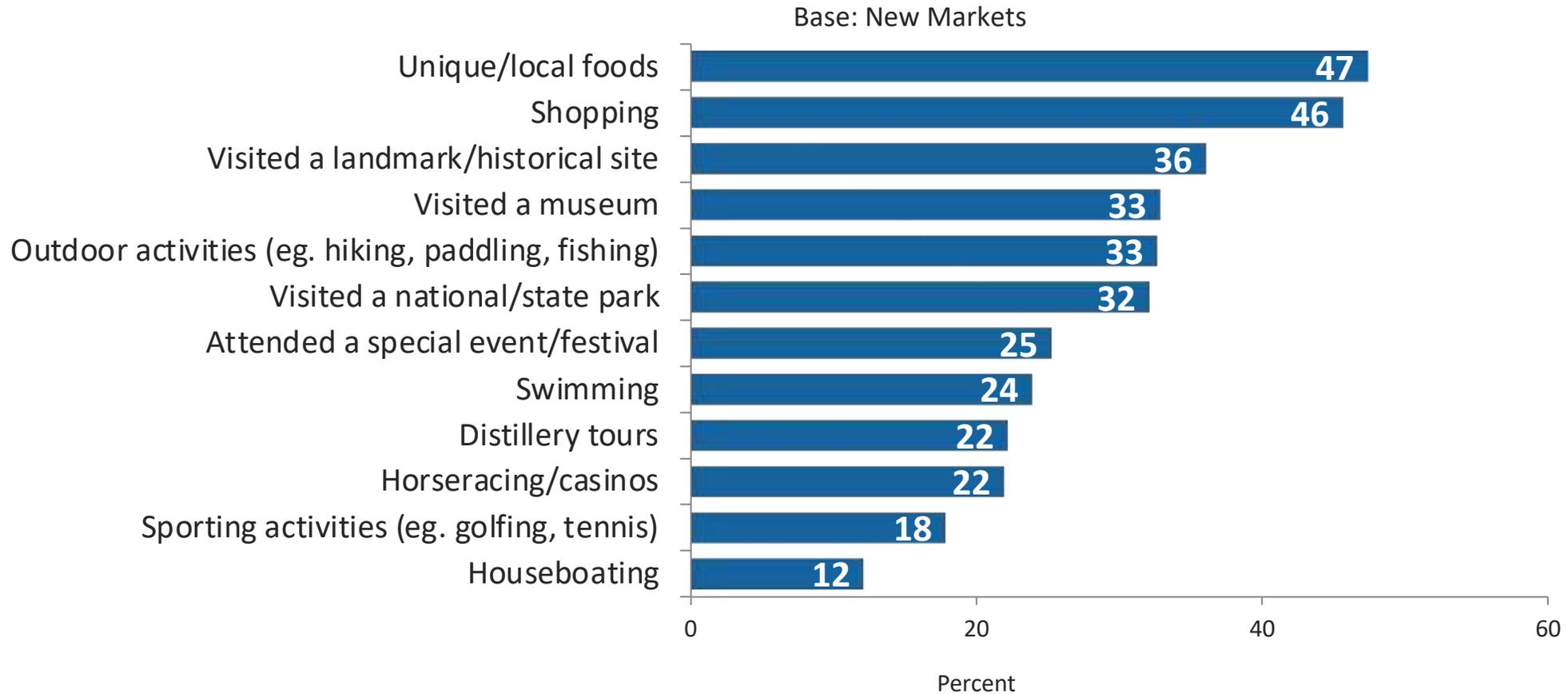
Activities Participated on Overnight Trip to Kentucky – Total Markets



Activities Participated on Overnight Trip to Kentucky – Existing Markets



Activities Participated on Overnight Trip to Kentucky – New Markets



*This is Kentucky -
Come see for yourself.*



Kentucky
BLUEGRASS, BLUES & BBQ



*This is Kentucky -
Come see for yourself.*



Kentucky
NORTHERN KENTUCKY
RIVER REGION



Longwoods
INTERNATIONAL

Kentucky's Image vs. Competition - Total

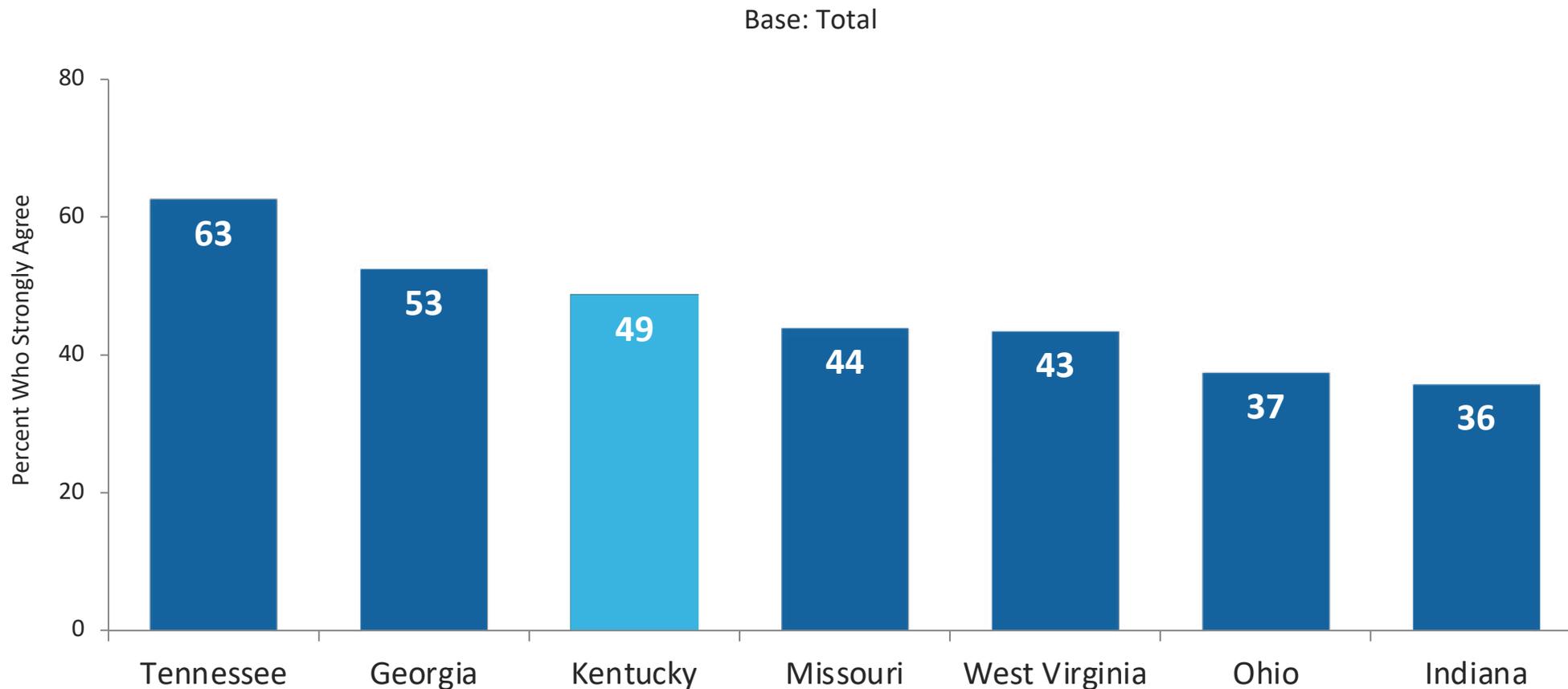
Kentucky's Image – Total Markets

- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their total advertising markets:
 - Across the markets survey, half (49%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
 - Ahead of Missouri, West Virginia, Ohio, and Indiana.
 - Behind Tennessee and Georgia.
- On the other overall image measure, perceptions as being “excellent value for money”, the rank ordering is different:
 - Kentucky (47%) is in second place, behind Tennessee.
 - West Virginia, Georgia, Indiana, Missouri, and Ohio trail.
- When comparing Kentucky's image versus the image of the combined competition, Kentucky's top image strengths are:
 - Truly beautiful scenery/setting
 - Good place for camping
 - Good for hiking/backpacking

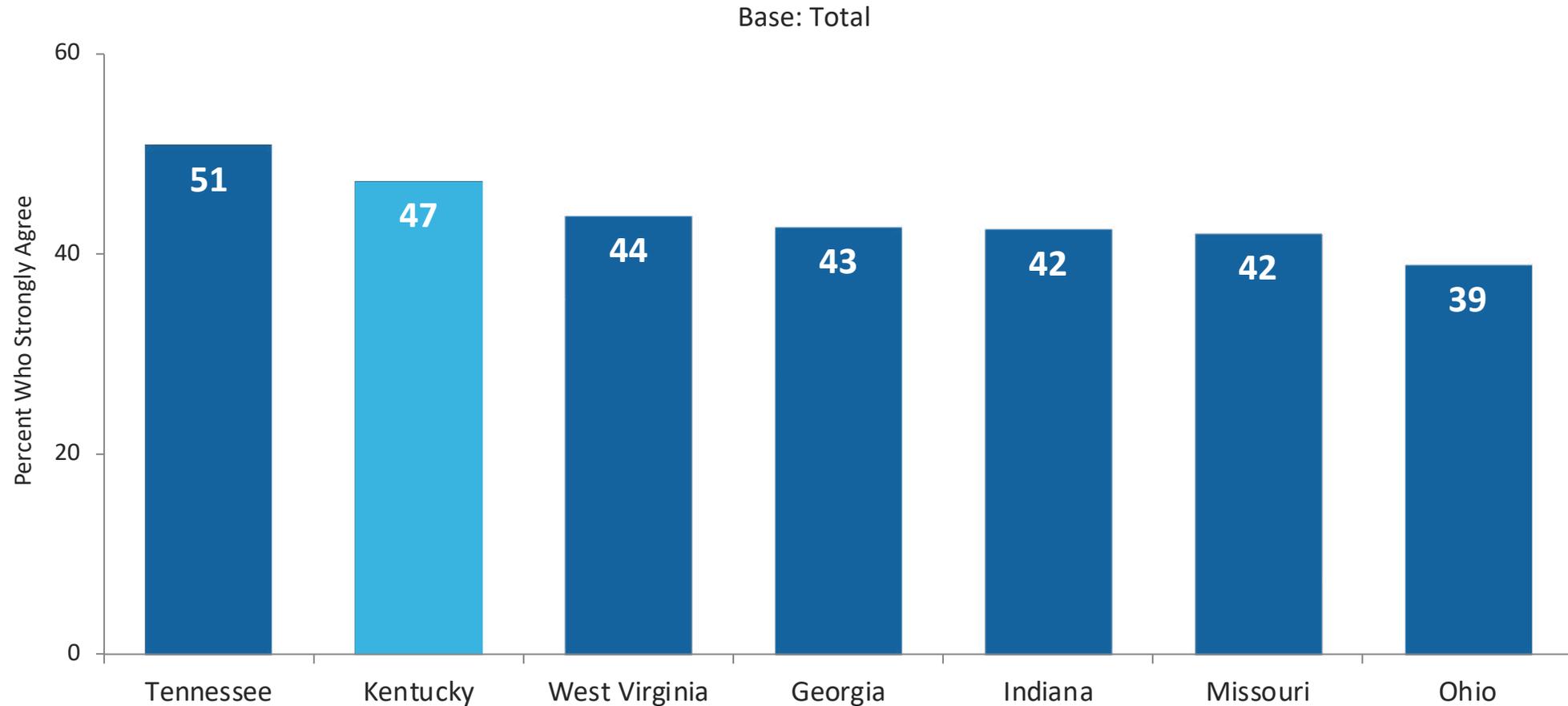
Kentucky's Image – Total Markets (Cont'd)

- The only weakness Kentucky had in comparison to the combined competitive set was for:
 - Exciting nightlife/entertainment

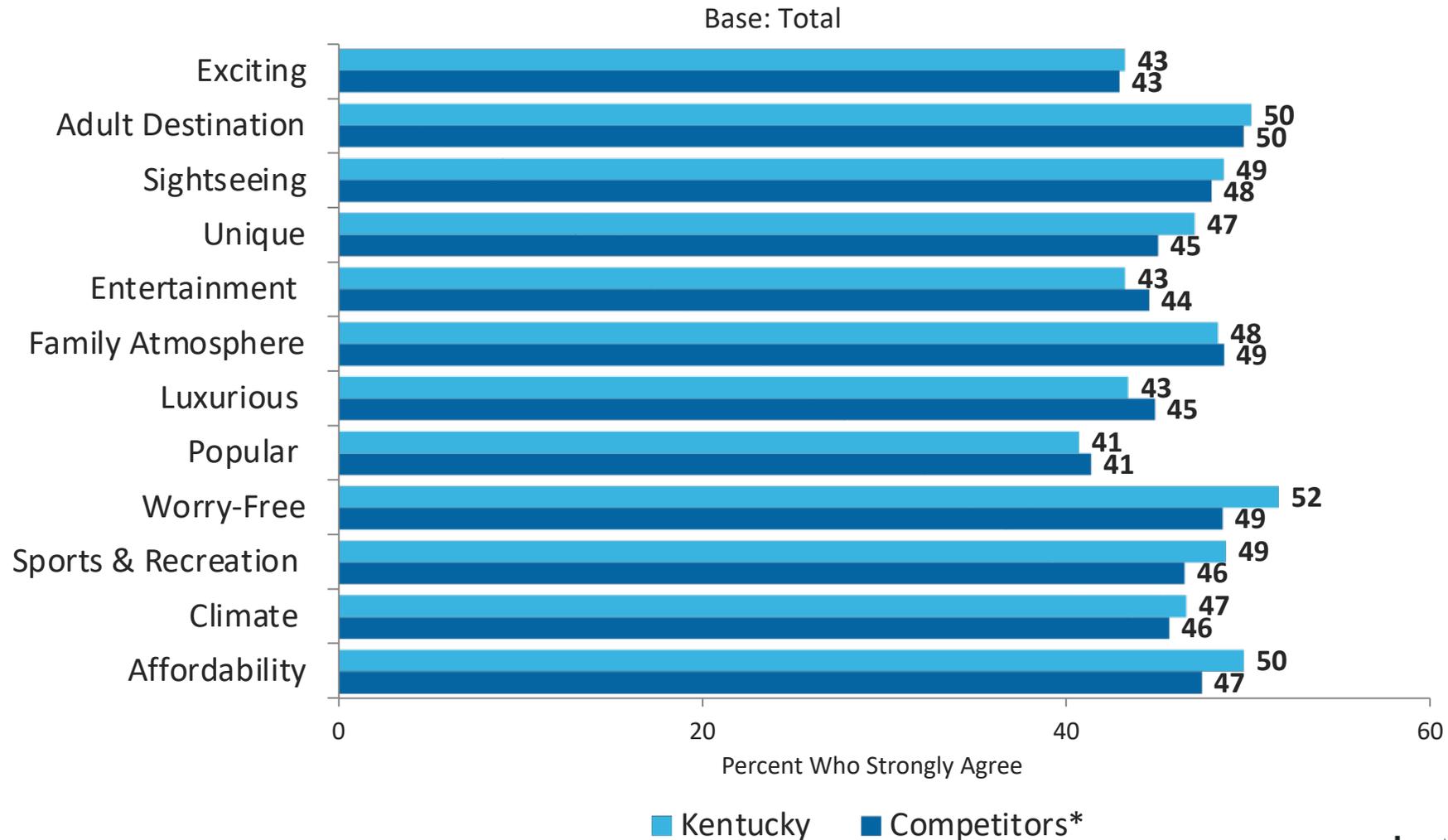
Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting” – Total Markets



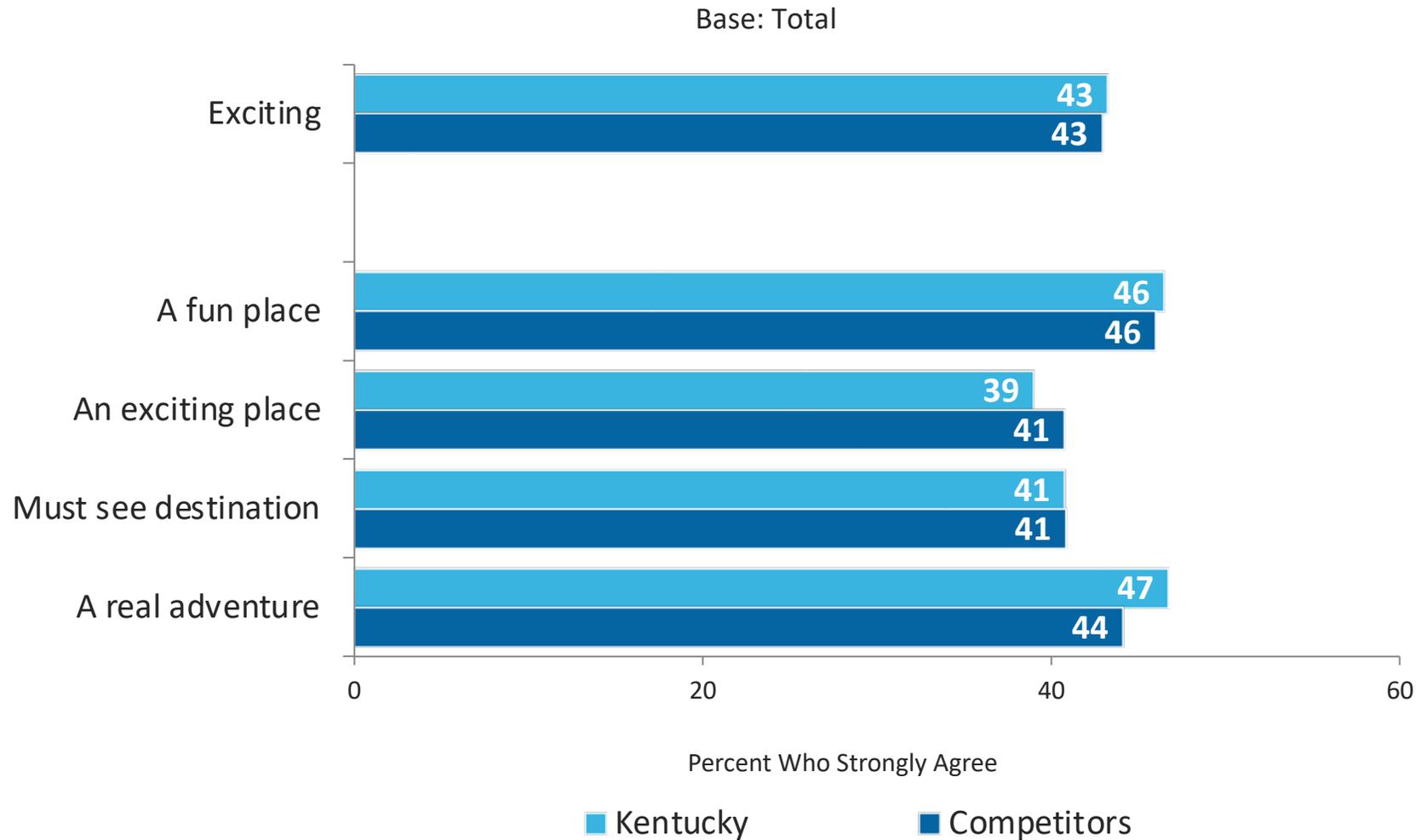
Kentucky Overall Image vs. Competition — “Excellent Value For the Money” – Total Markets



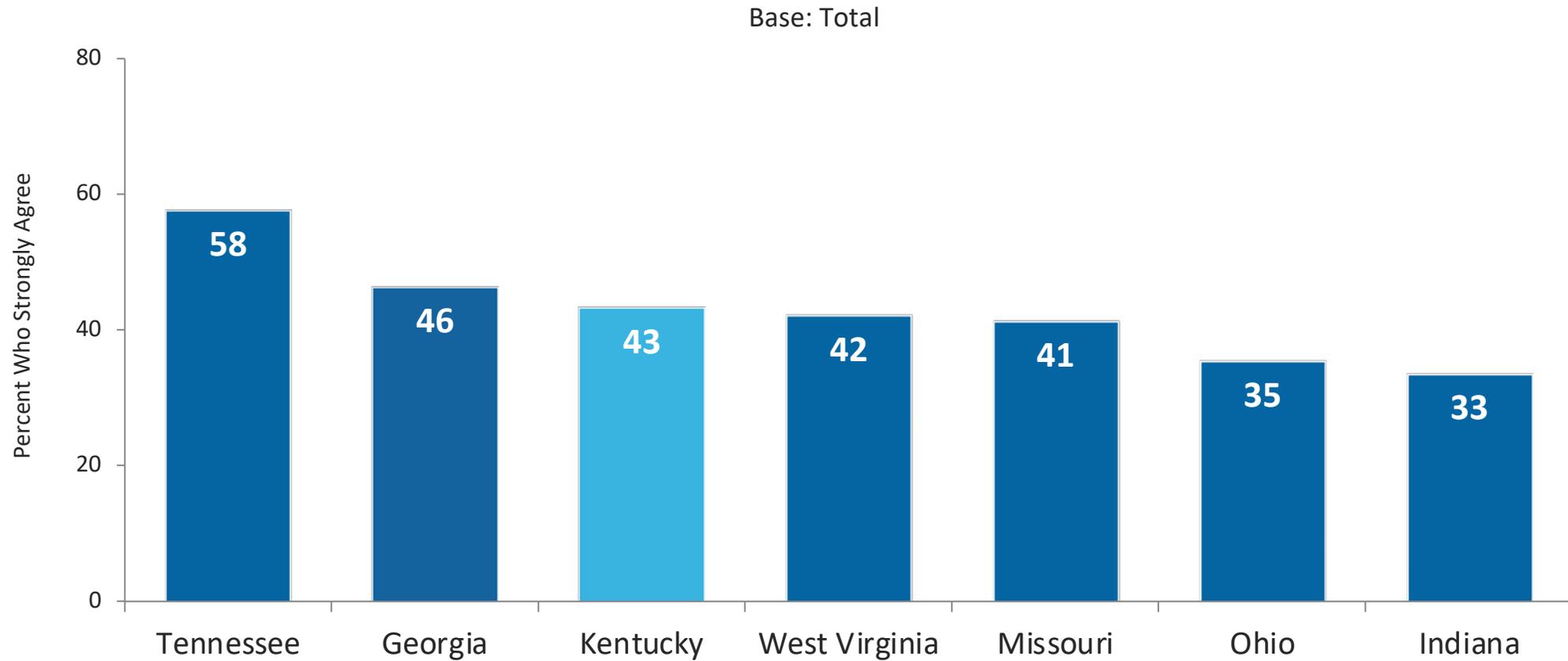
Kentucky's Overall Image vs. Competition – Total Markets



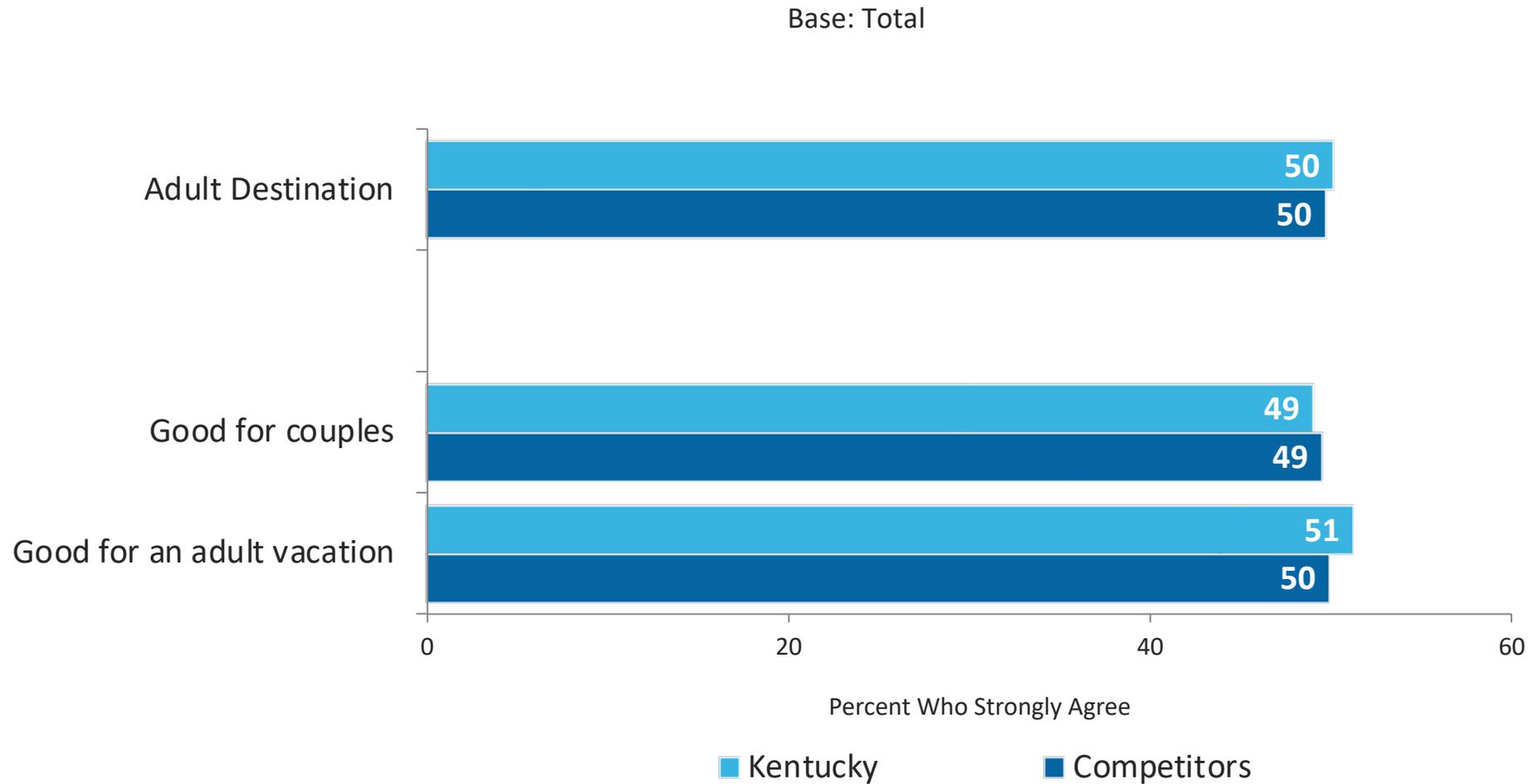
Kentucky's Image vs. Competition — Exciting – Total Markets



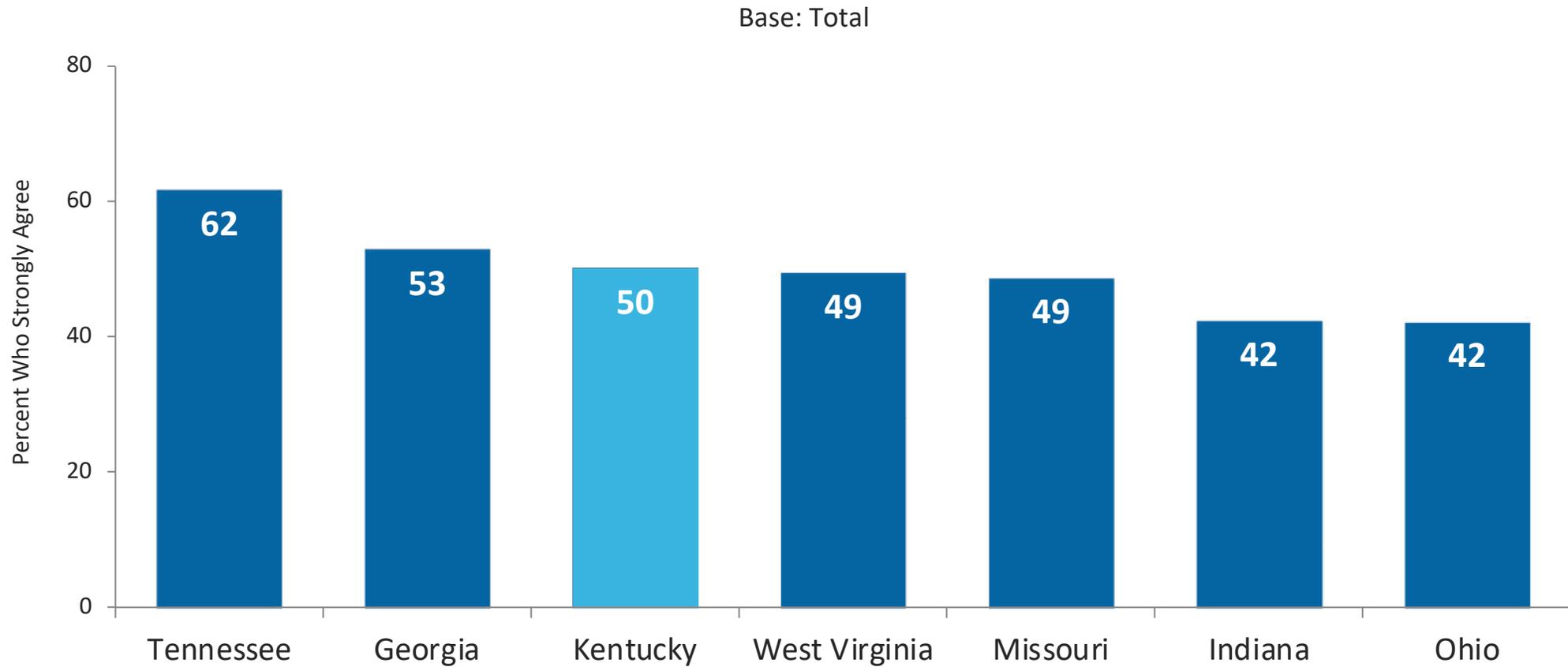
Kentucky's Image vs. Competition — Exciting – Total Markets



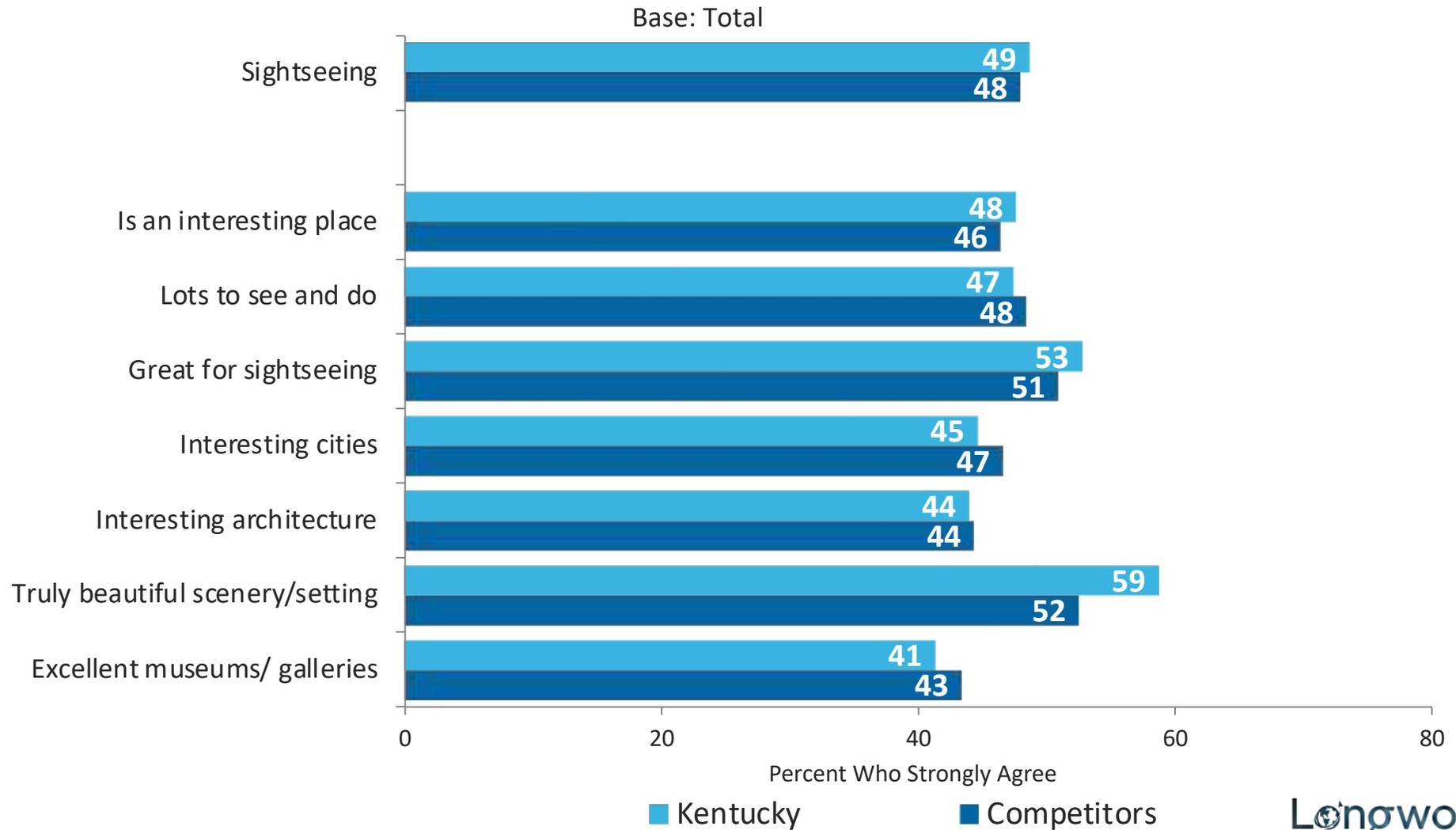
Kentucky's Image vs. Competition — Adult Destination – Total Markets



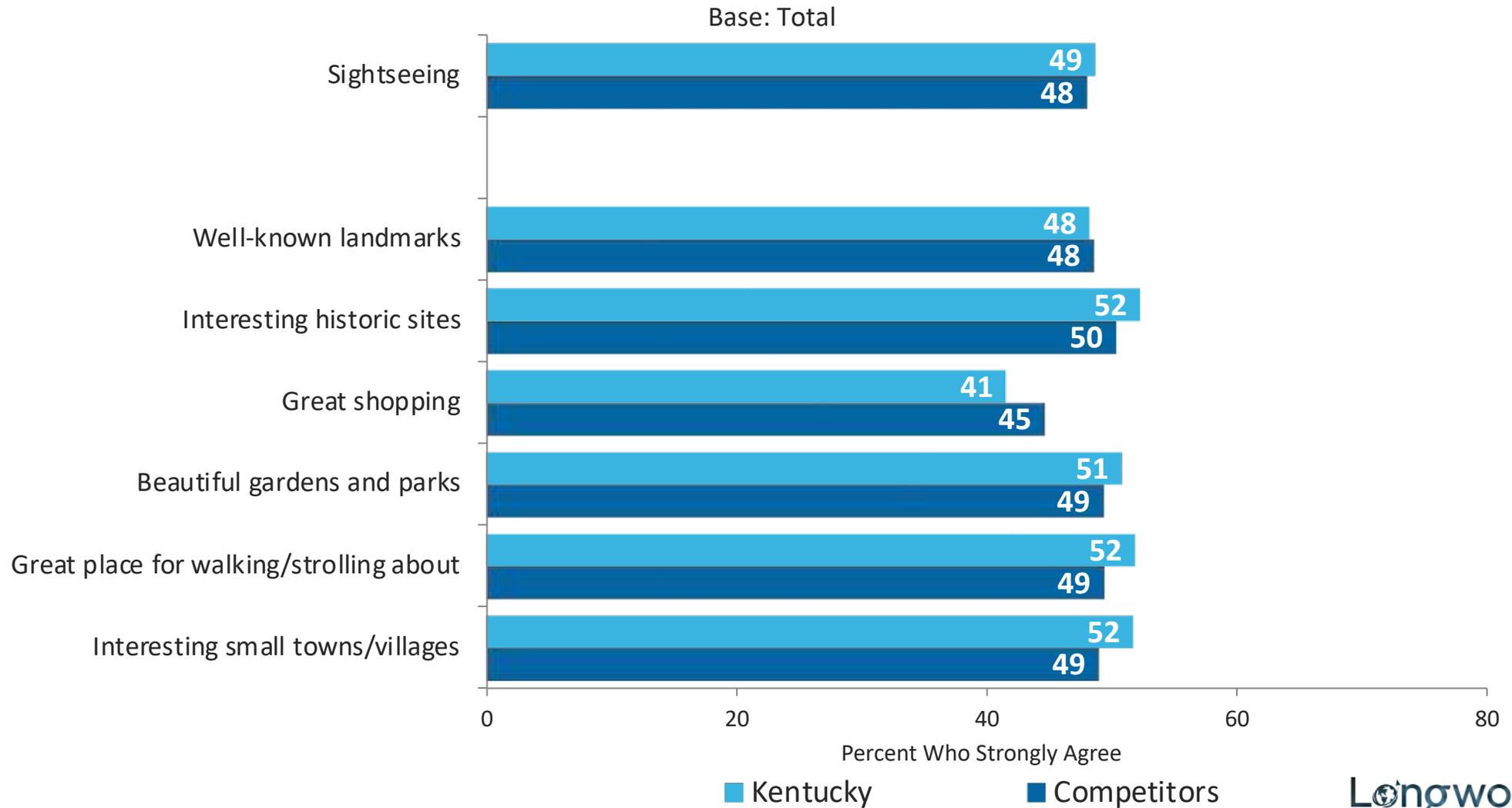
Kentucky's Image vs. Competition — Adult Destination — Total Markets



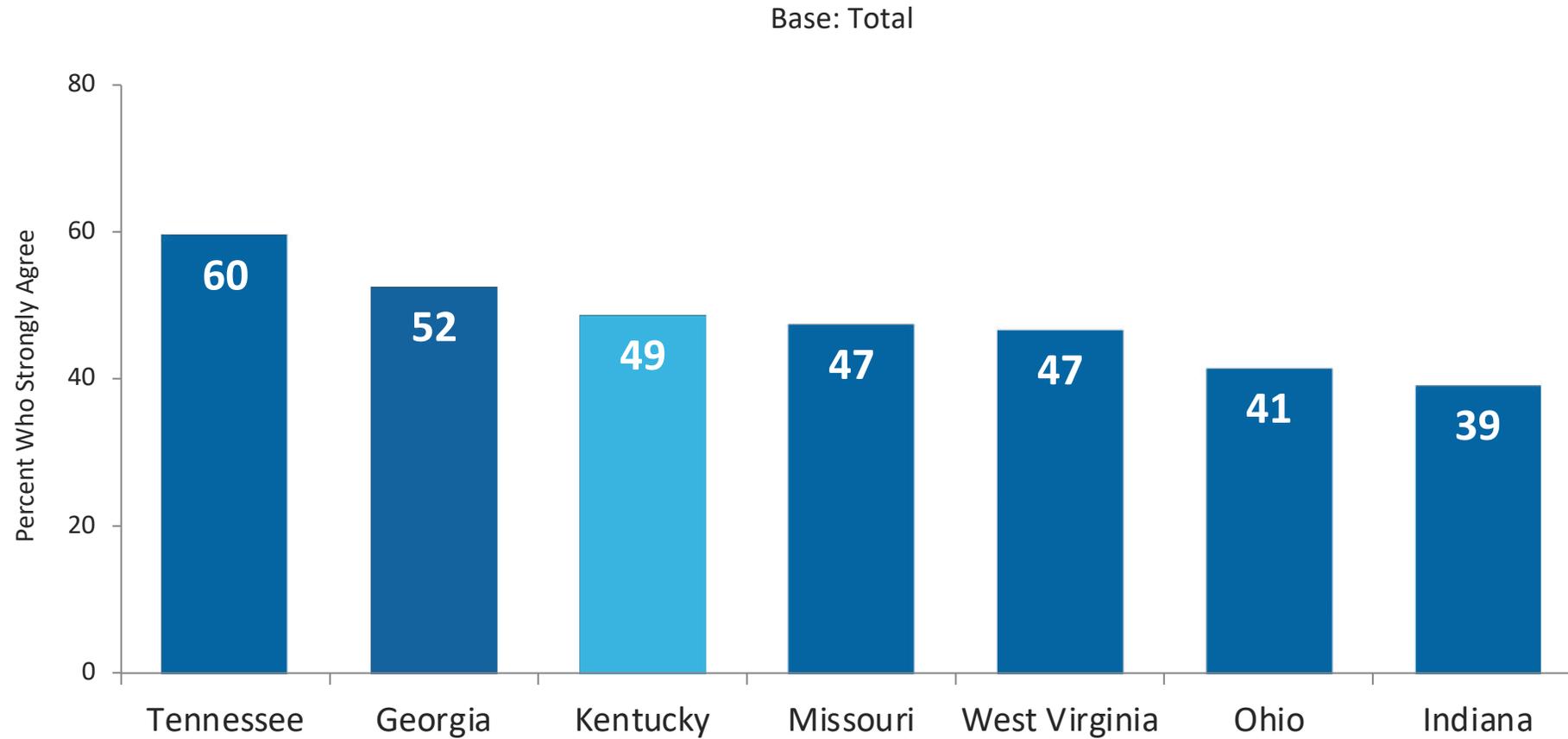
Kentucky's Image vs. Competition — Sightseeing – Total Markets



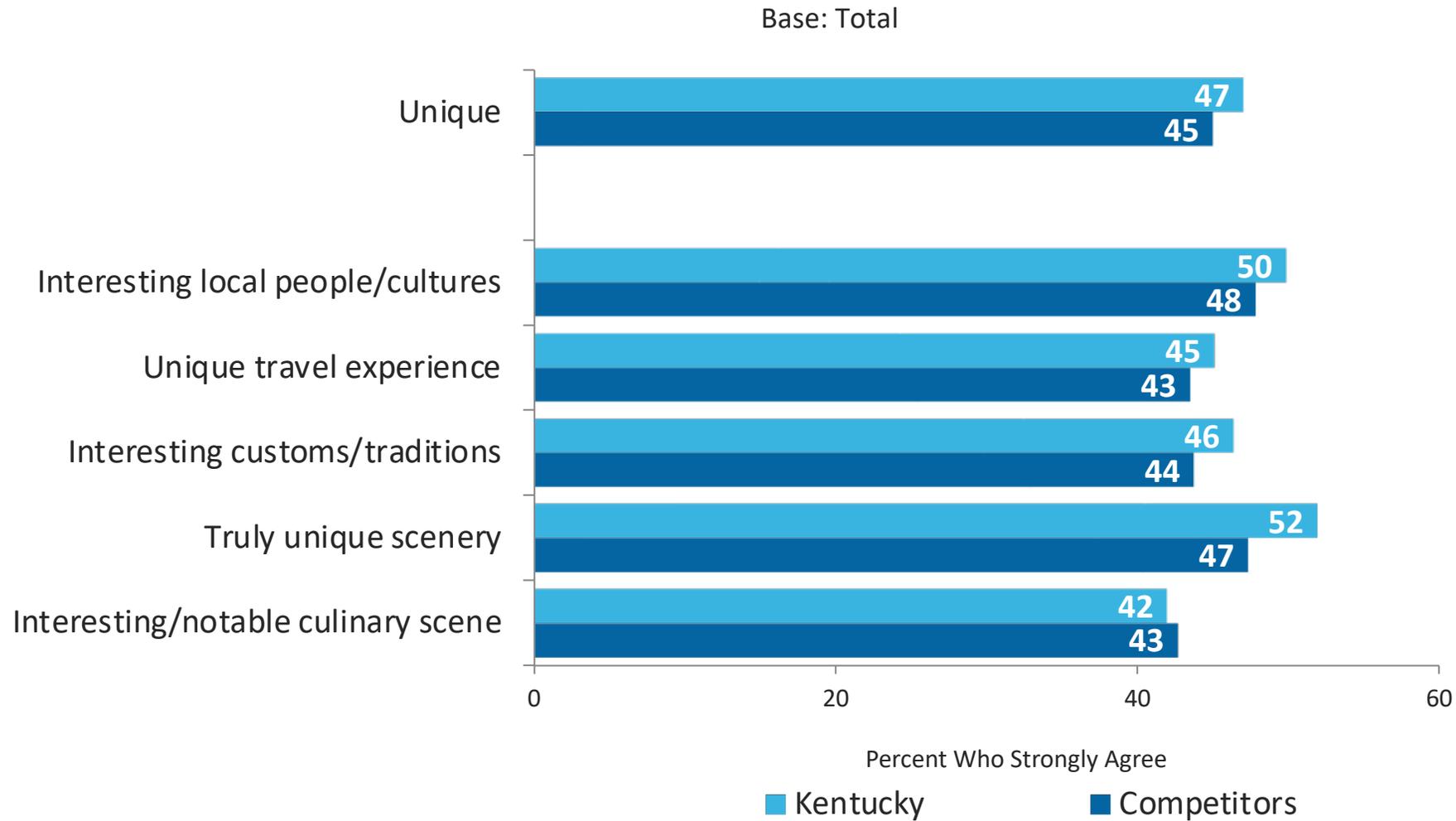
Kentucky's Image vs. Competition — Sightseeing — Total Markets (Cont'd)



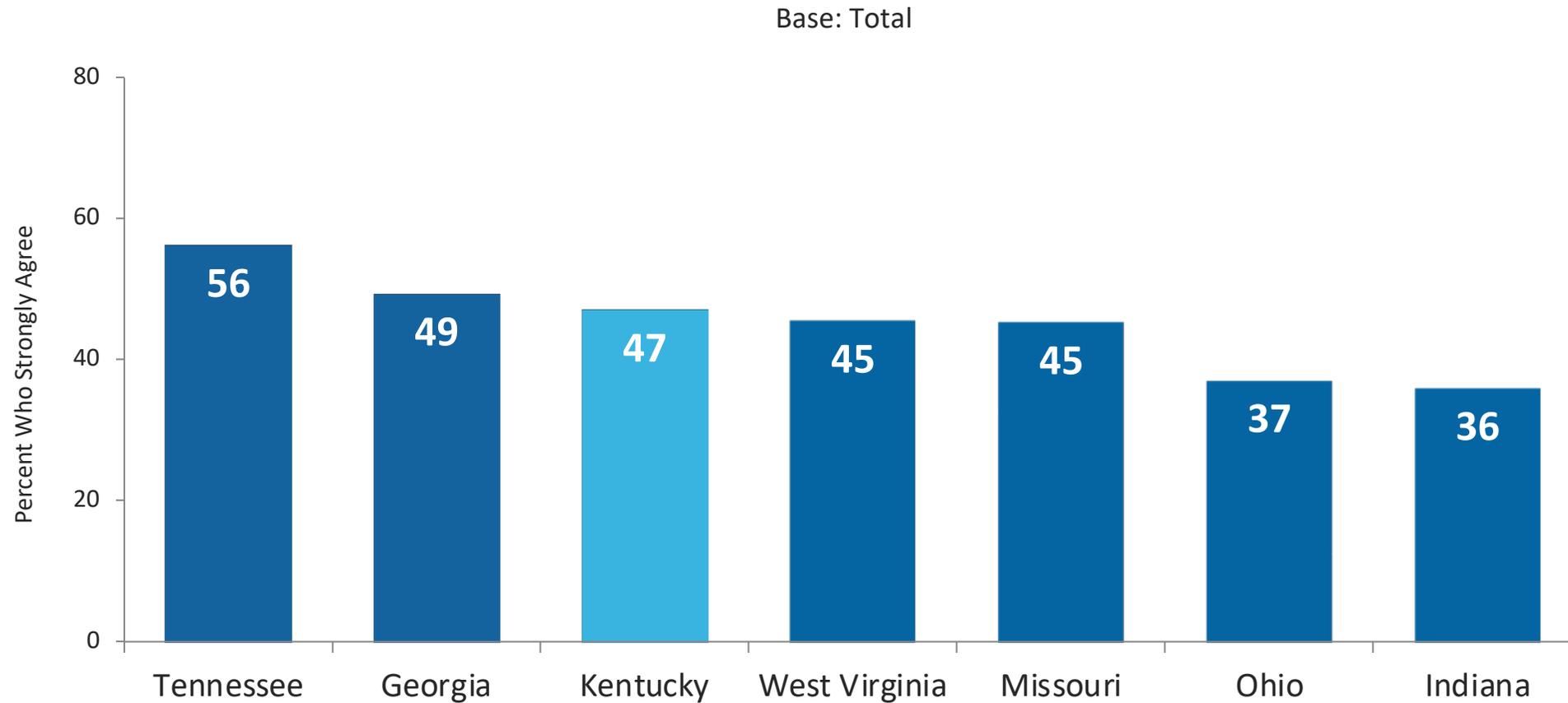
Kentucky's Image vs. Competition — Sightseeing – Total Markets



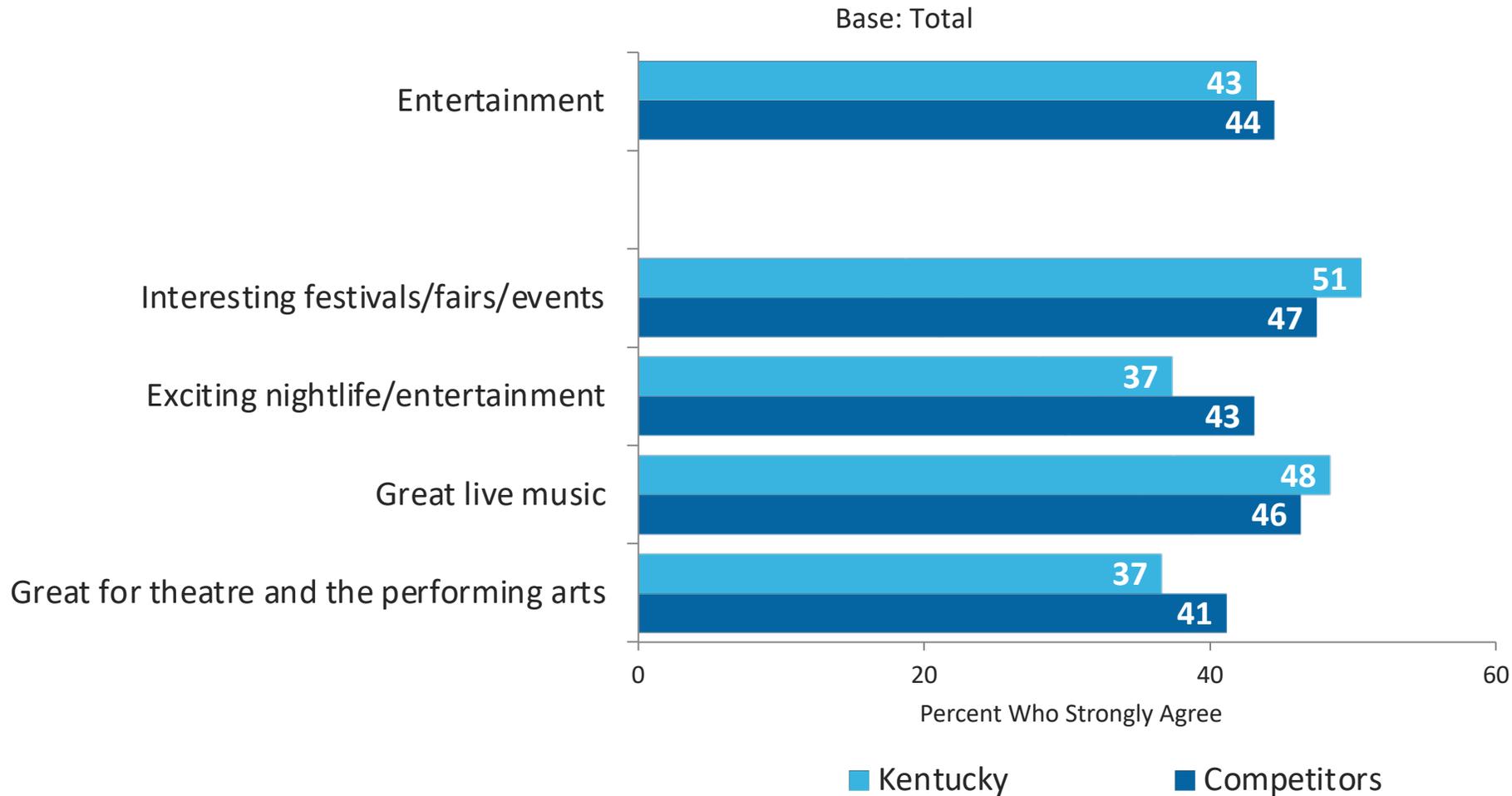
Kentucky's Image vs. Competition — Unique – Total Markets



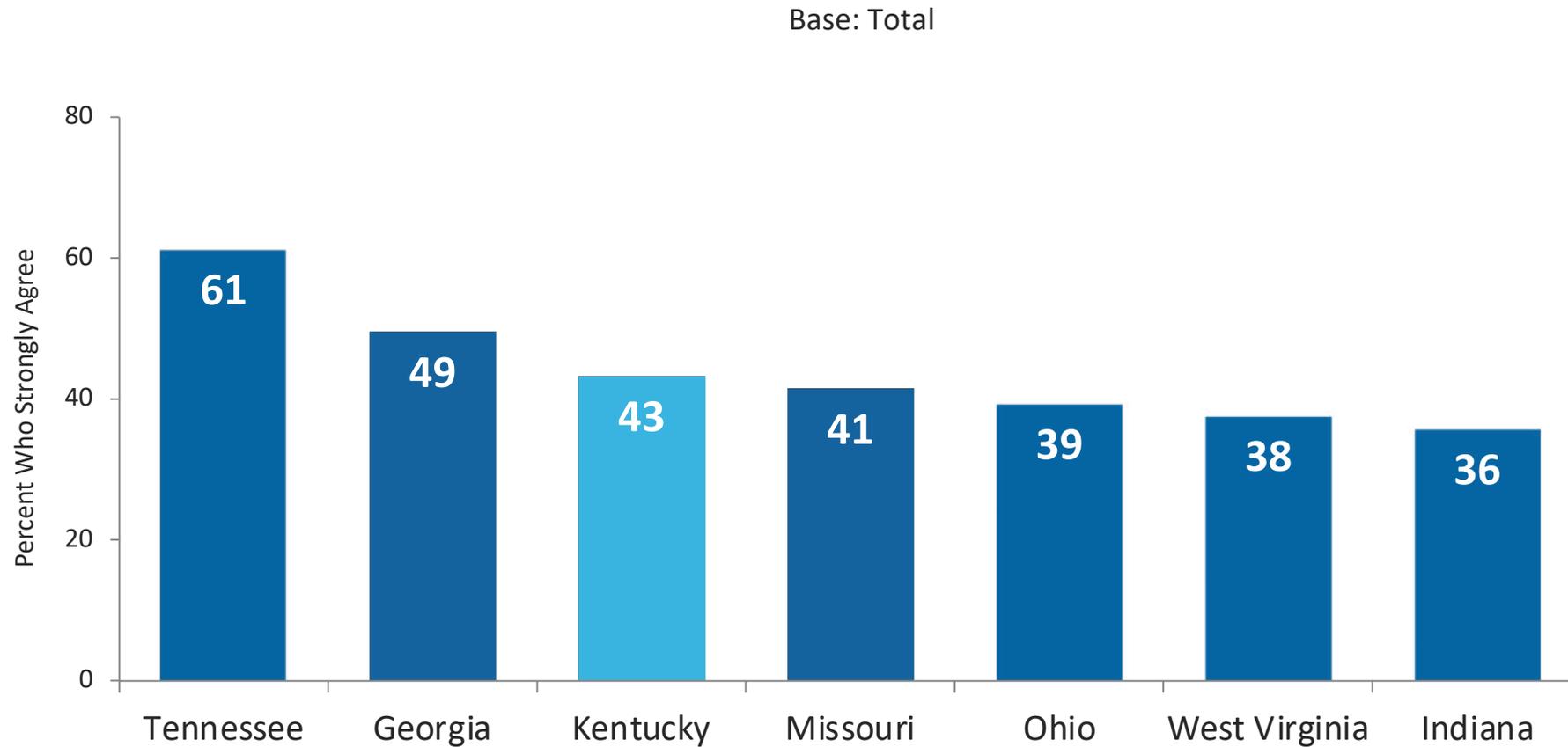
Kentucky's Image vs. Competition — Unique – Total Markets



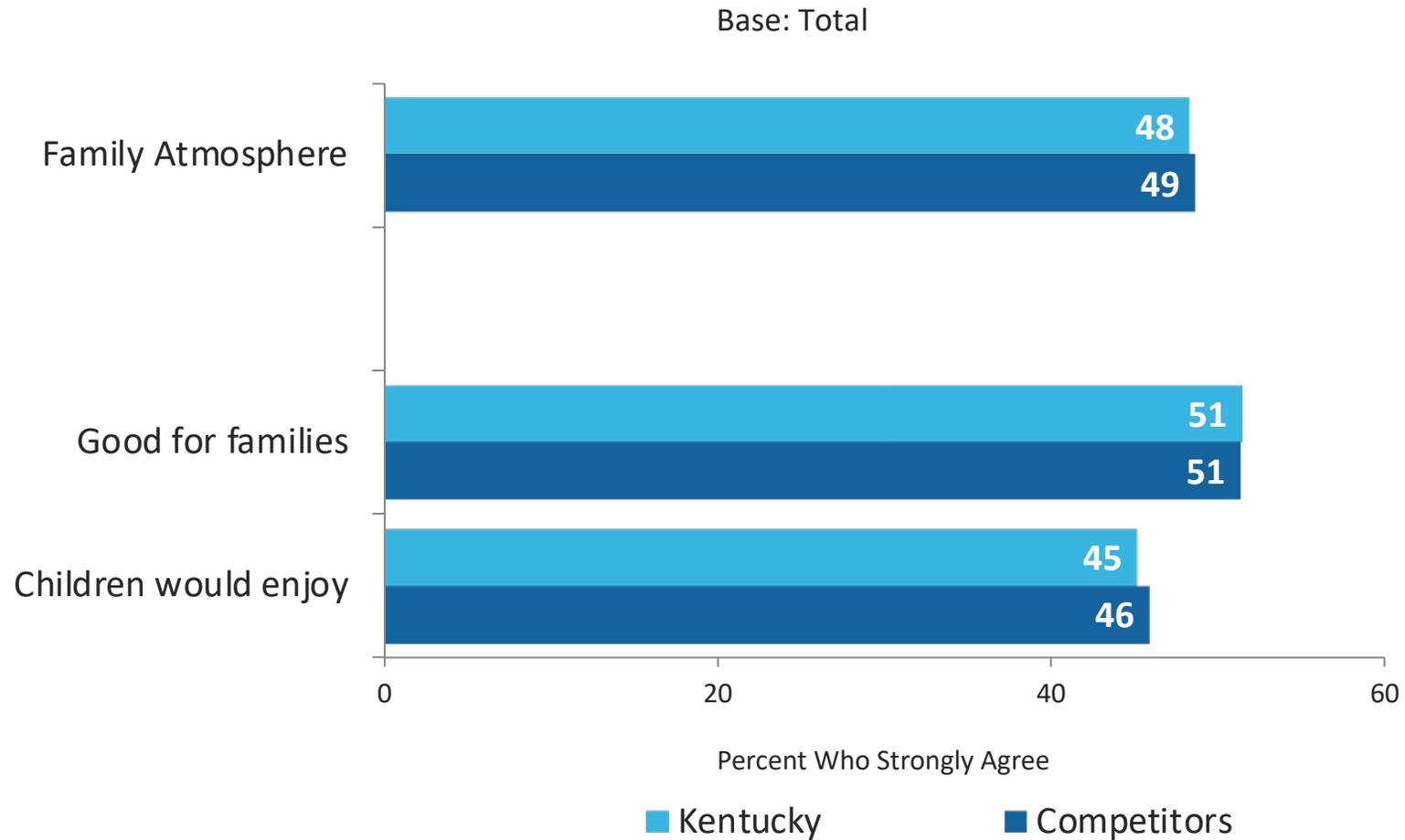
Kentucky's Image vs. Competition — Entertainment – Total Markets



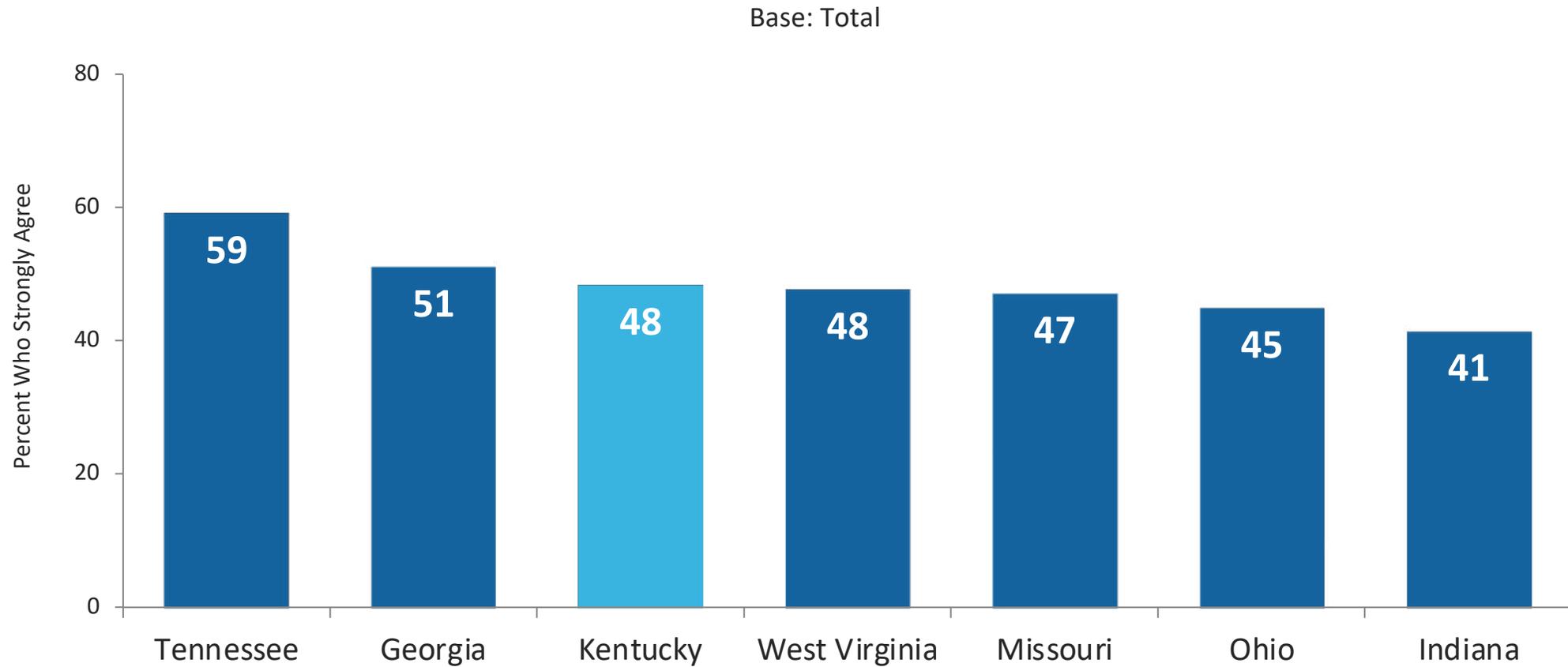
Kentucky's Image vs. Competition — Entertainment — Total Markets



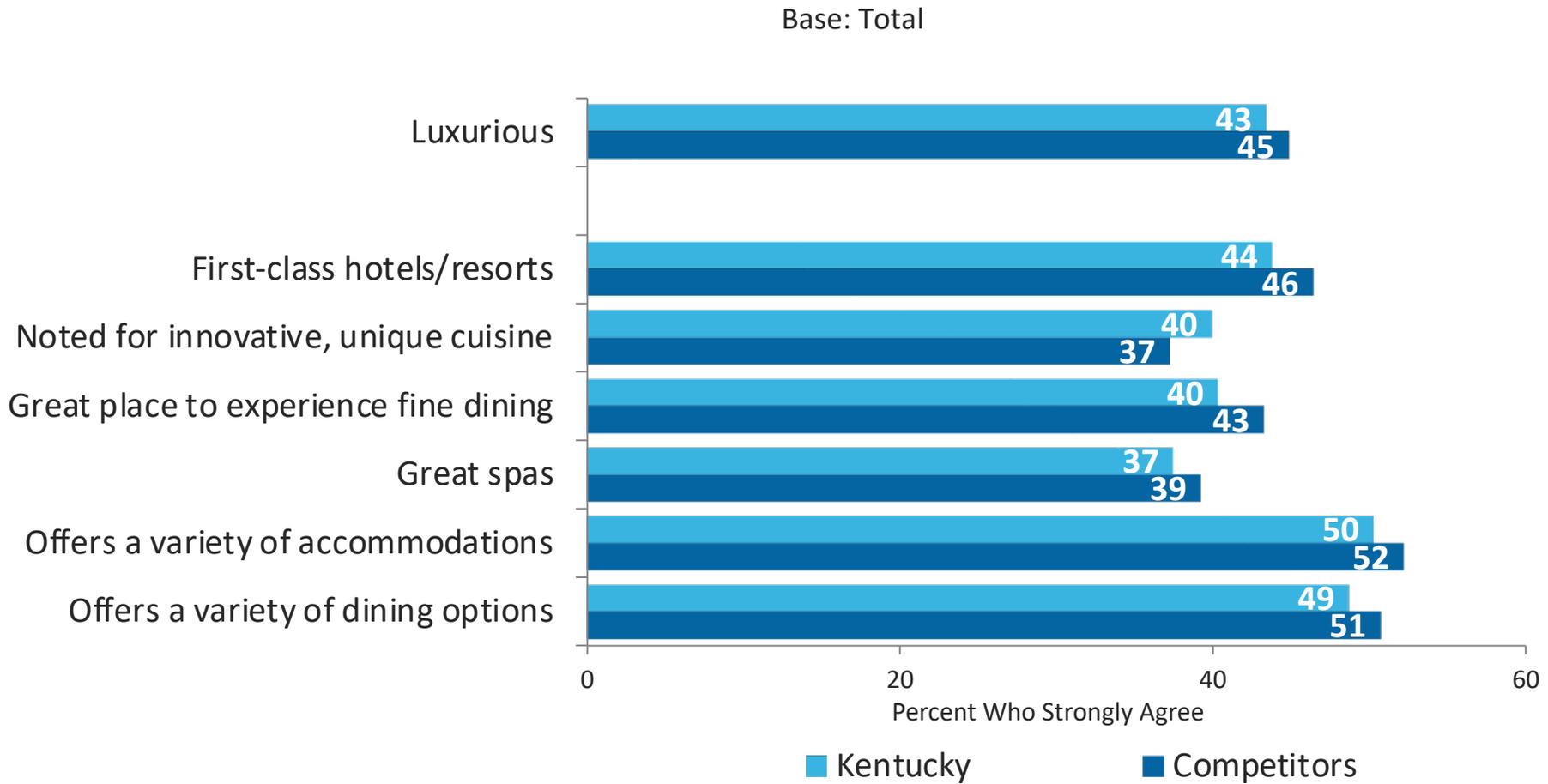
Kentucky's Image vs. Competition — Family Atmosphere – Total Markets



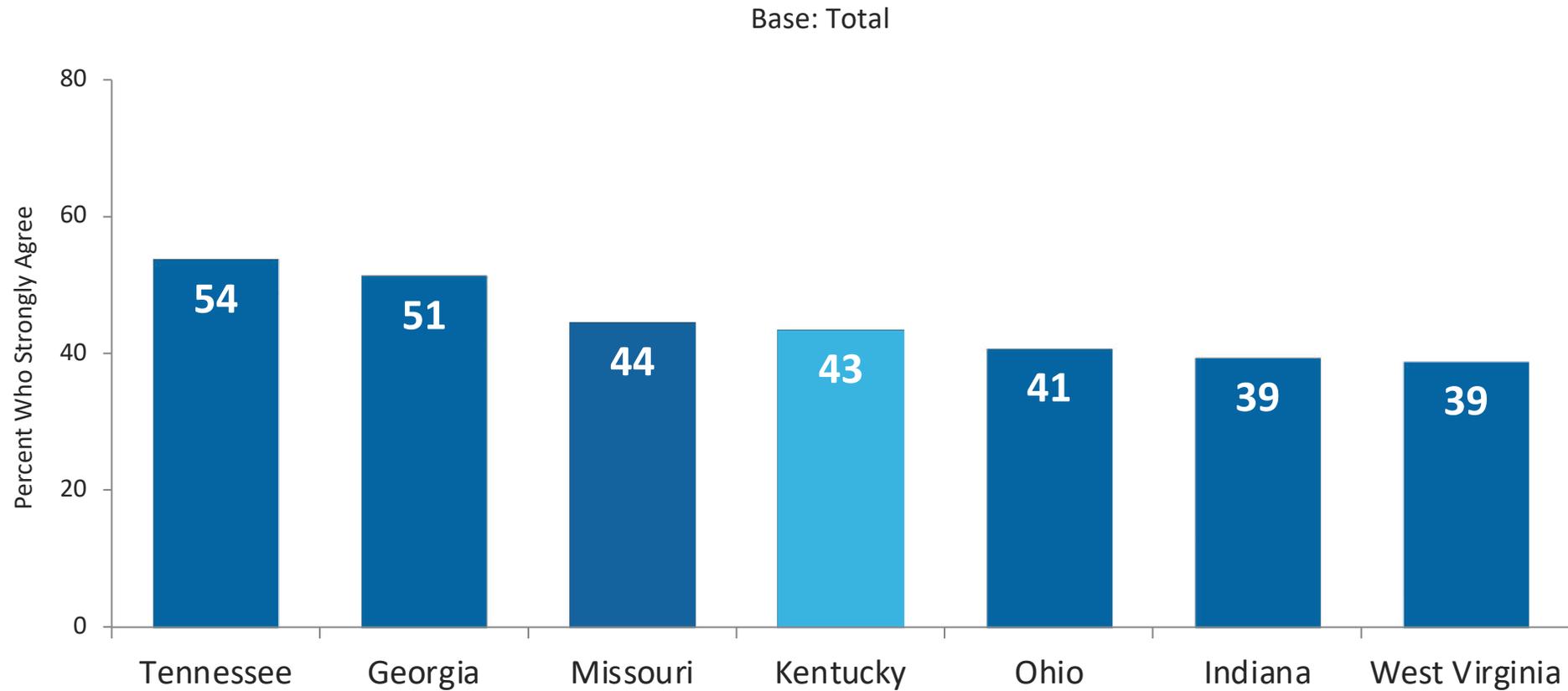
Kentucky's Image vs. Competition — Family Atmosphere – Total Markets



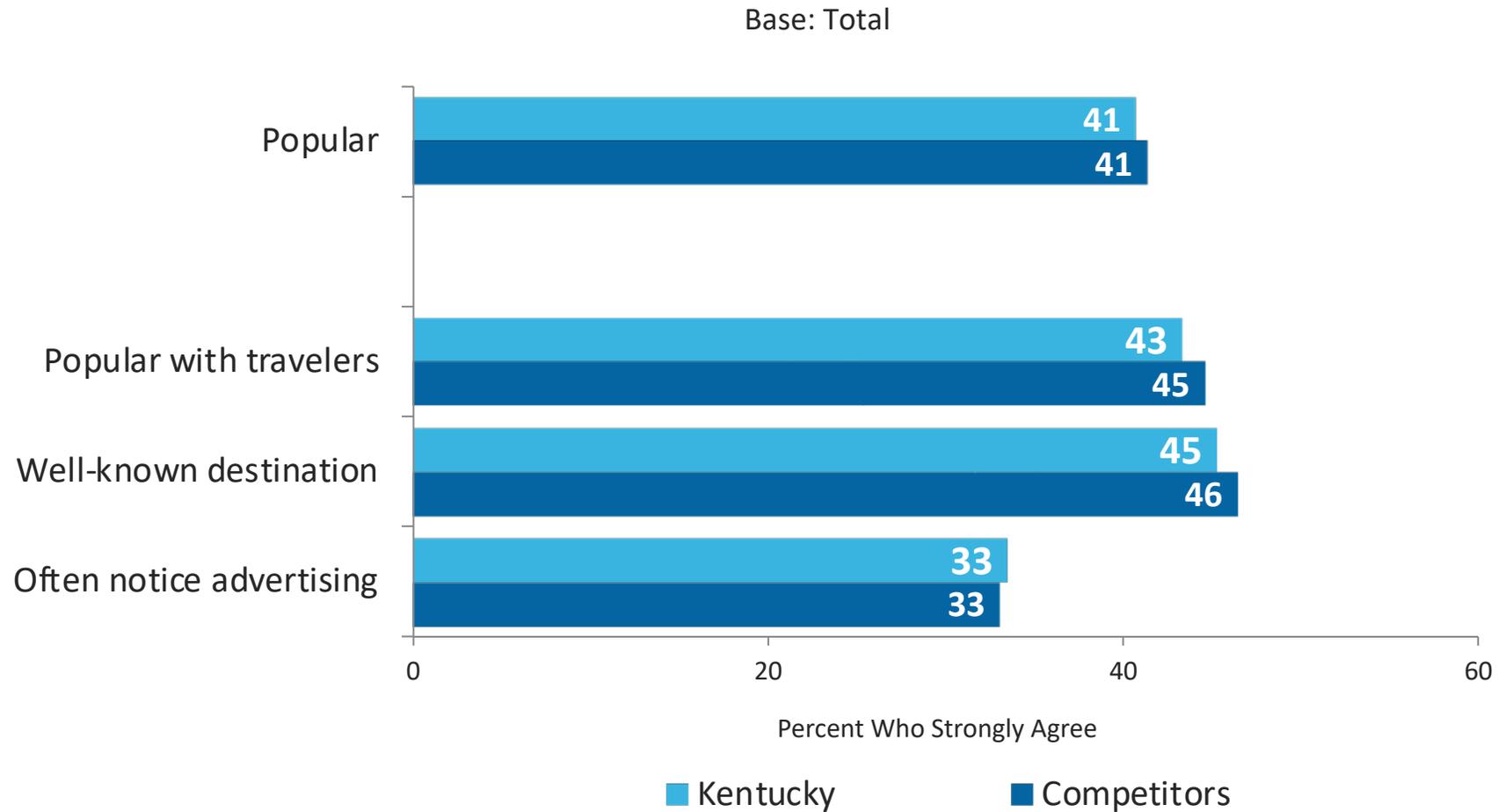
Kentucky's Image vs. Competition — Luxurious – Total Markets



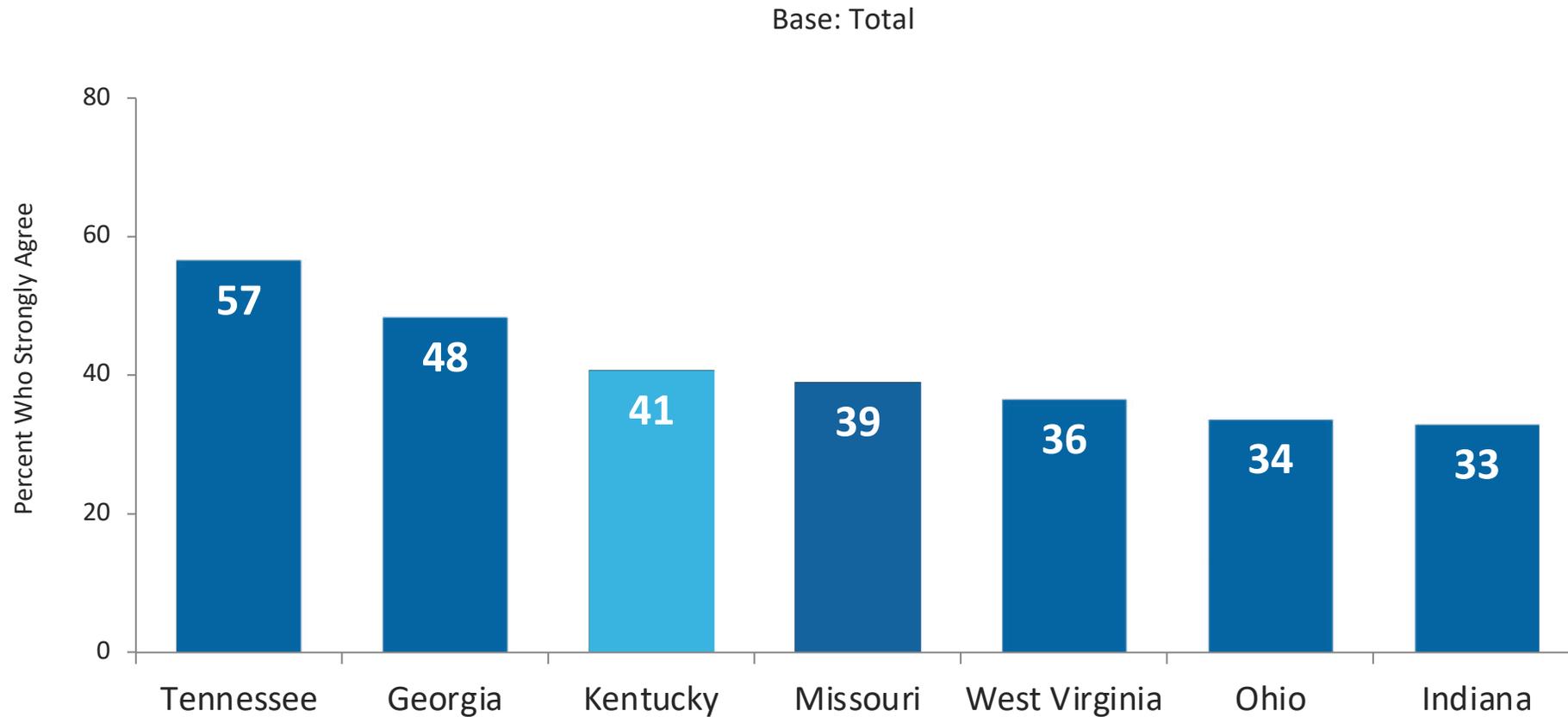
Kentucky's Image vs. Competition — Luxurious – Total Markets



Kentucky's Image vs. Competition — Popular – Total Markets

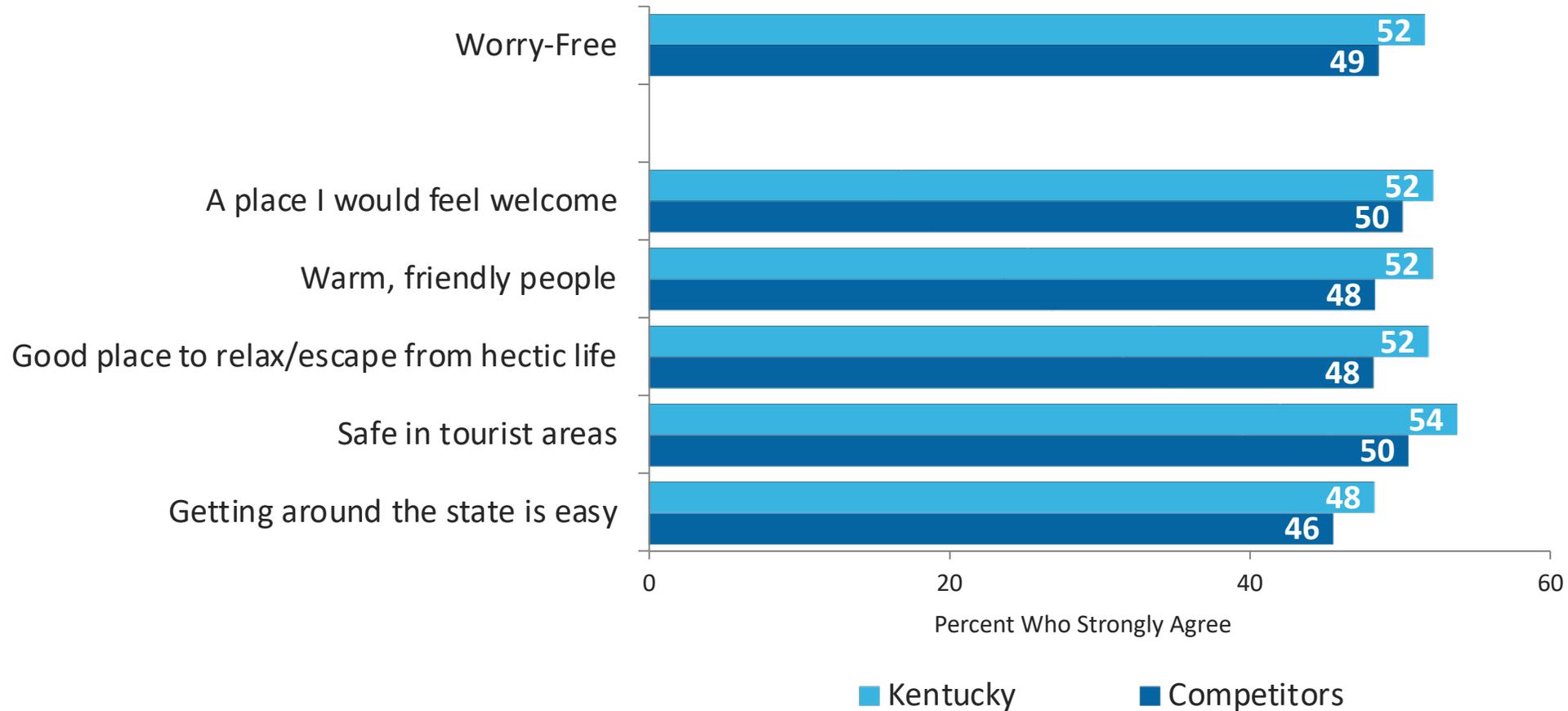


Kentucky's Image vs. Competition — Popular — Total Markets

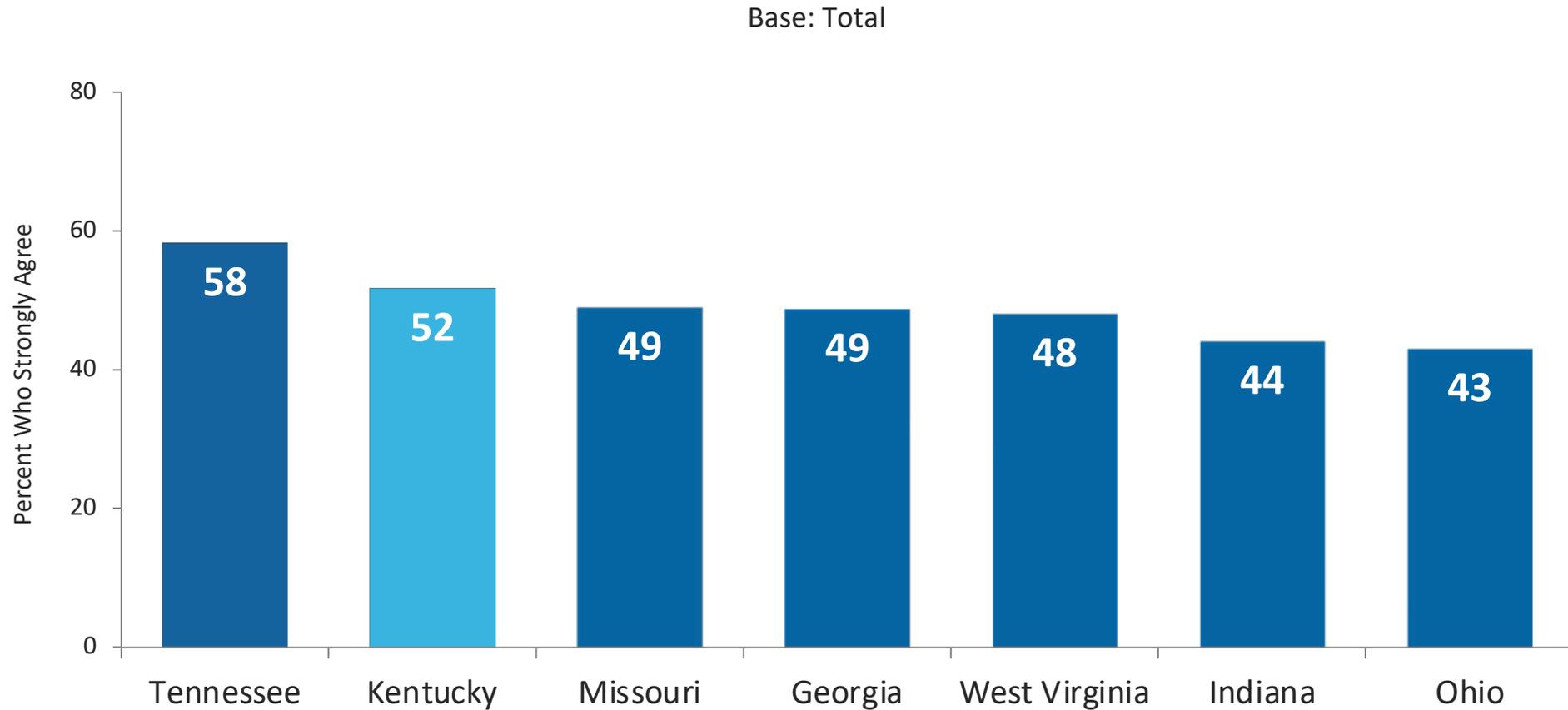


Kentucky's Image vs. Competition — Worry-Free – Total Markets

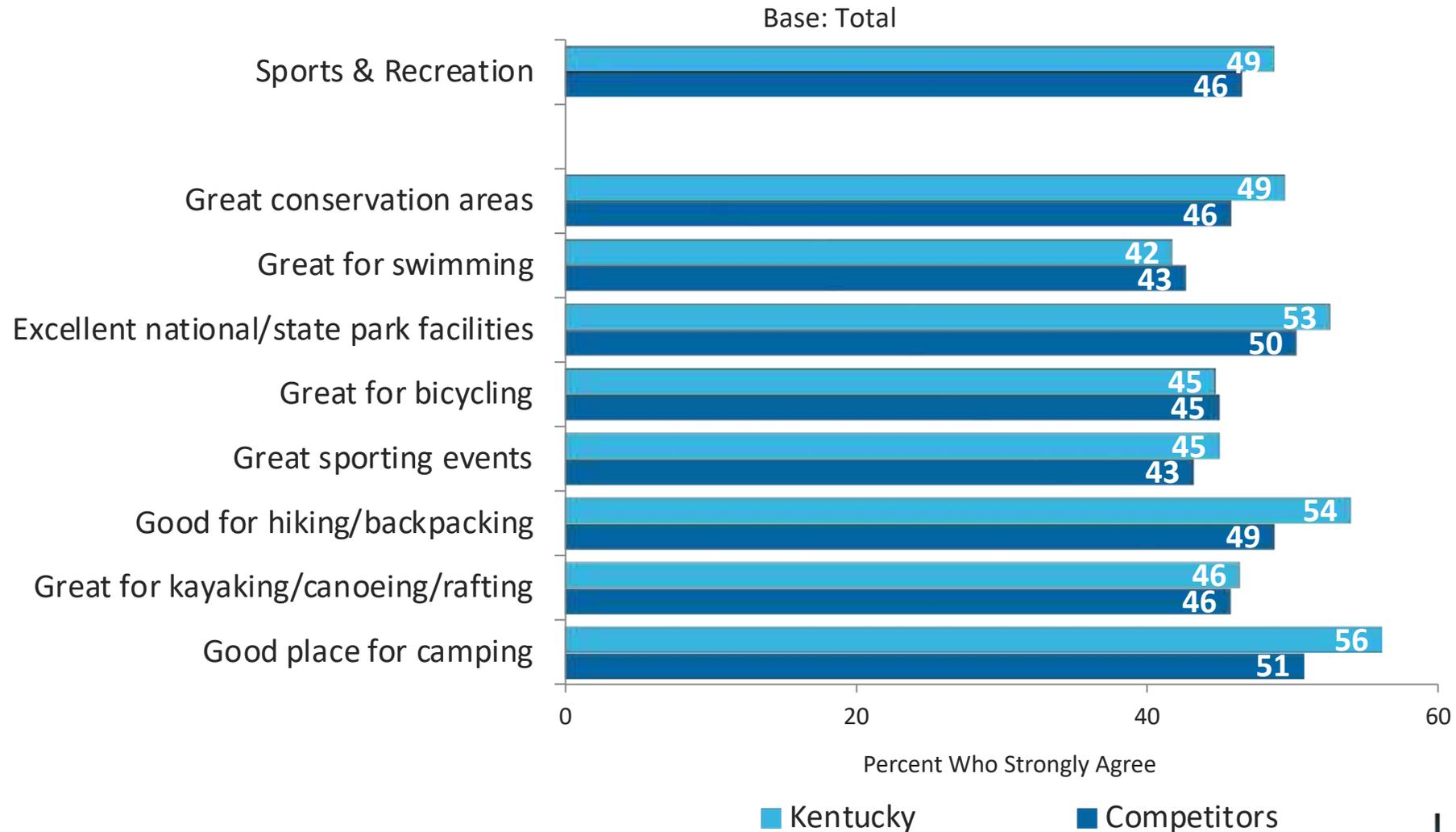
Base: Total



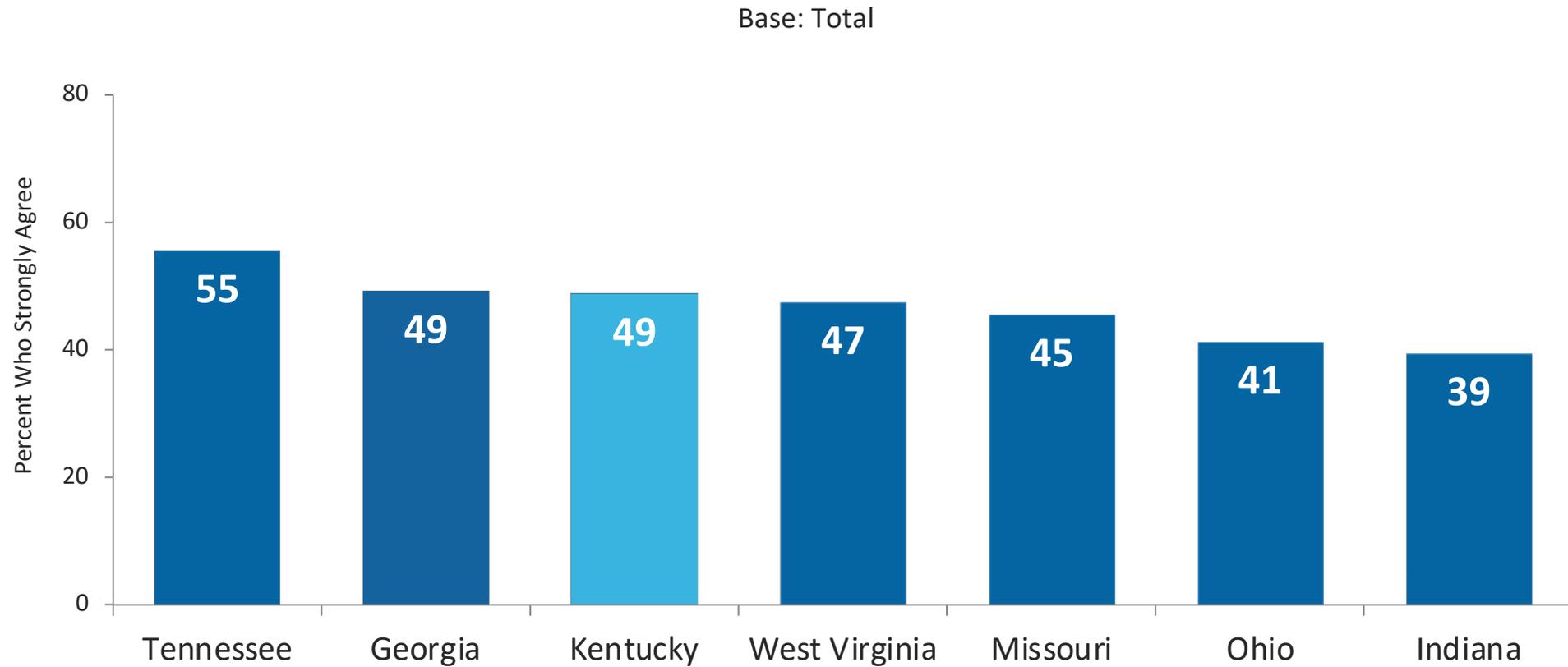
Kentucky's Image vs. Competition — Worry-Free – Total Markets



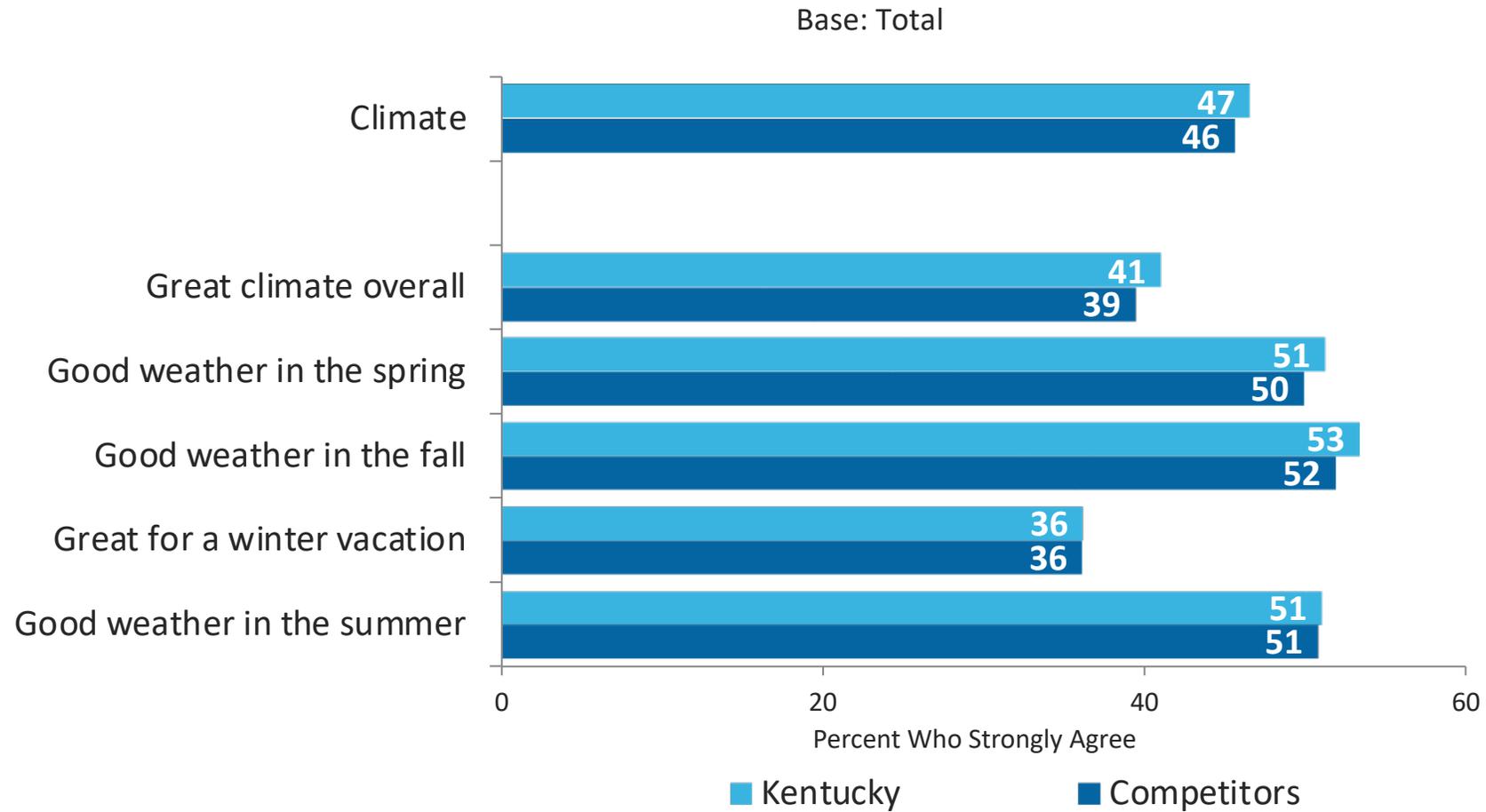
Kentucky's Image vs. Competition — Sports & Recreation – Total Markets



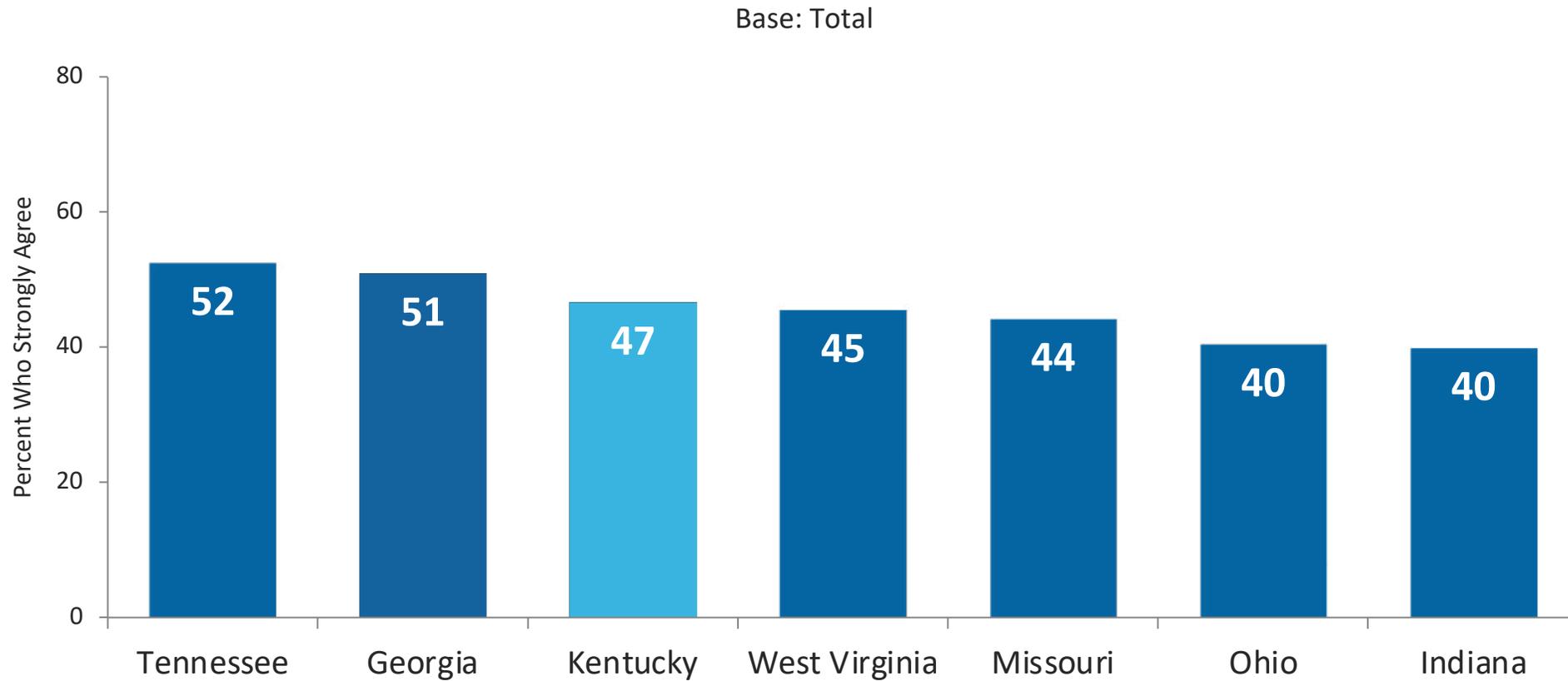
Kentucky's Image vs. Competition — Sports & Recreation – Total Markets



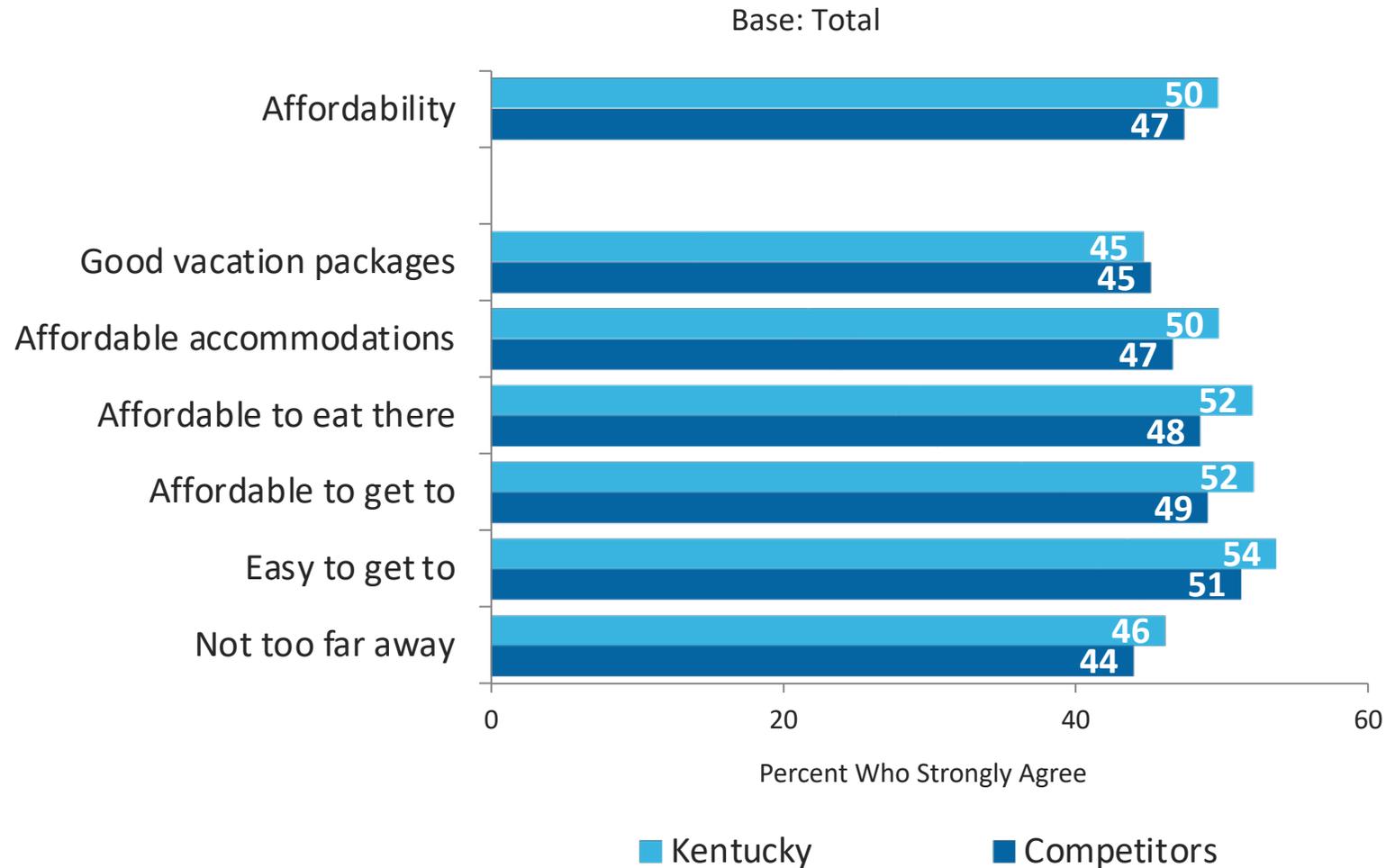
Kentucky's Image vs. Competition — Climate – Total Markets



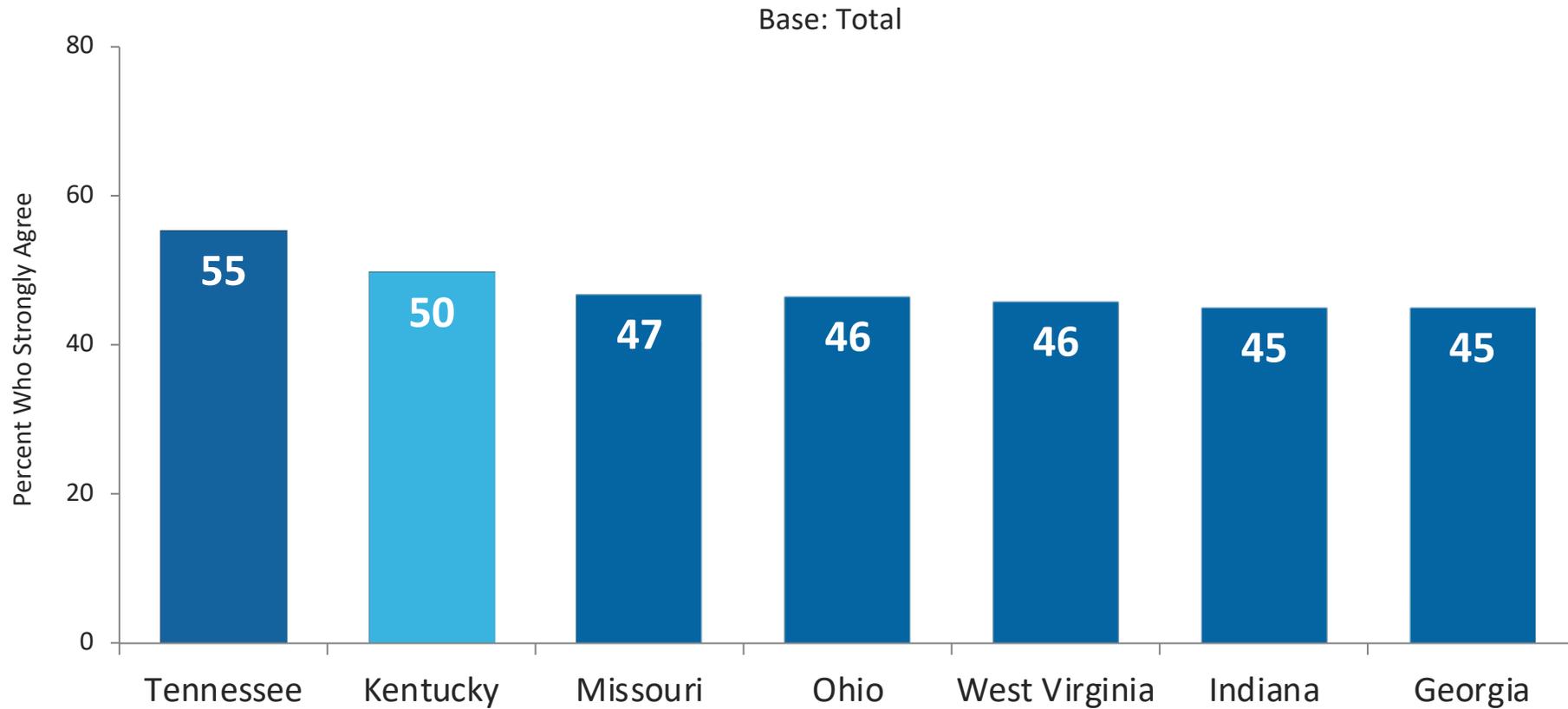
Kentucky's Image vs. Competition — Climate – Total Markets



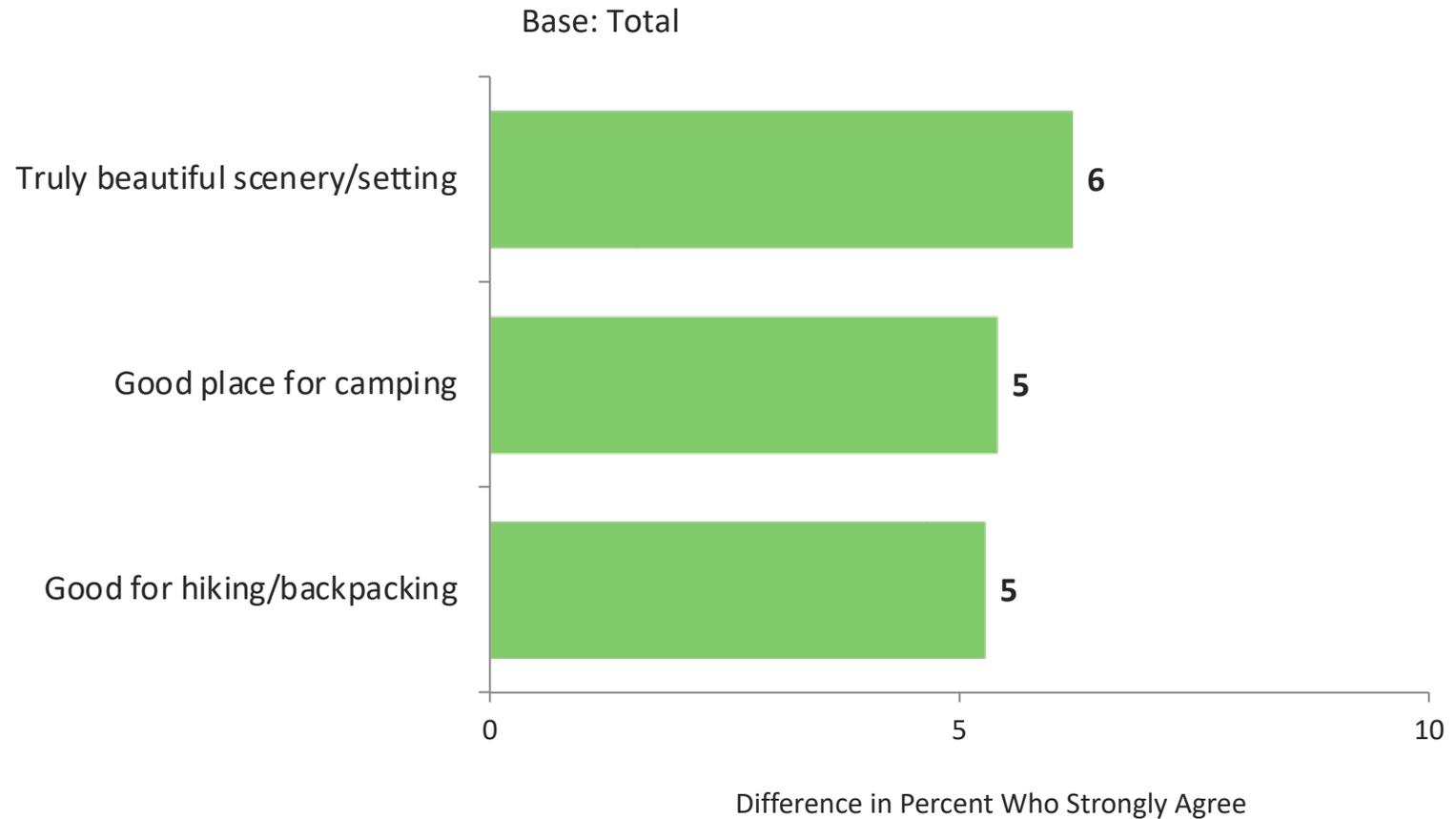
Kentucky's Image vs. Competition — Affordability – Total Markets



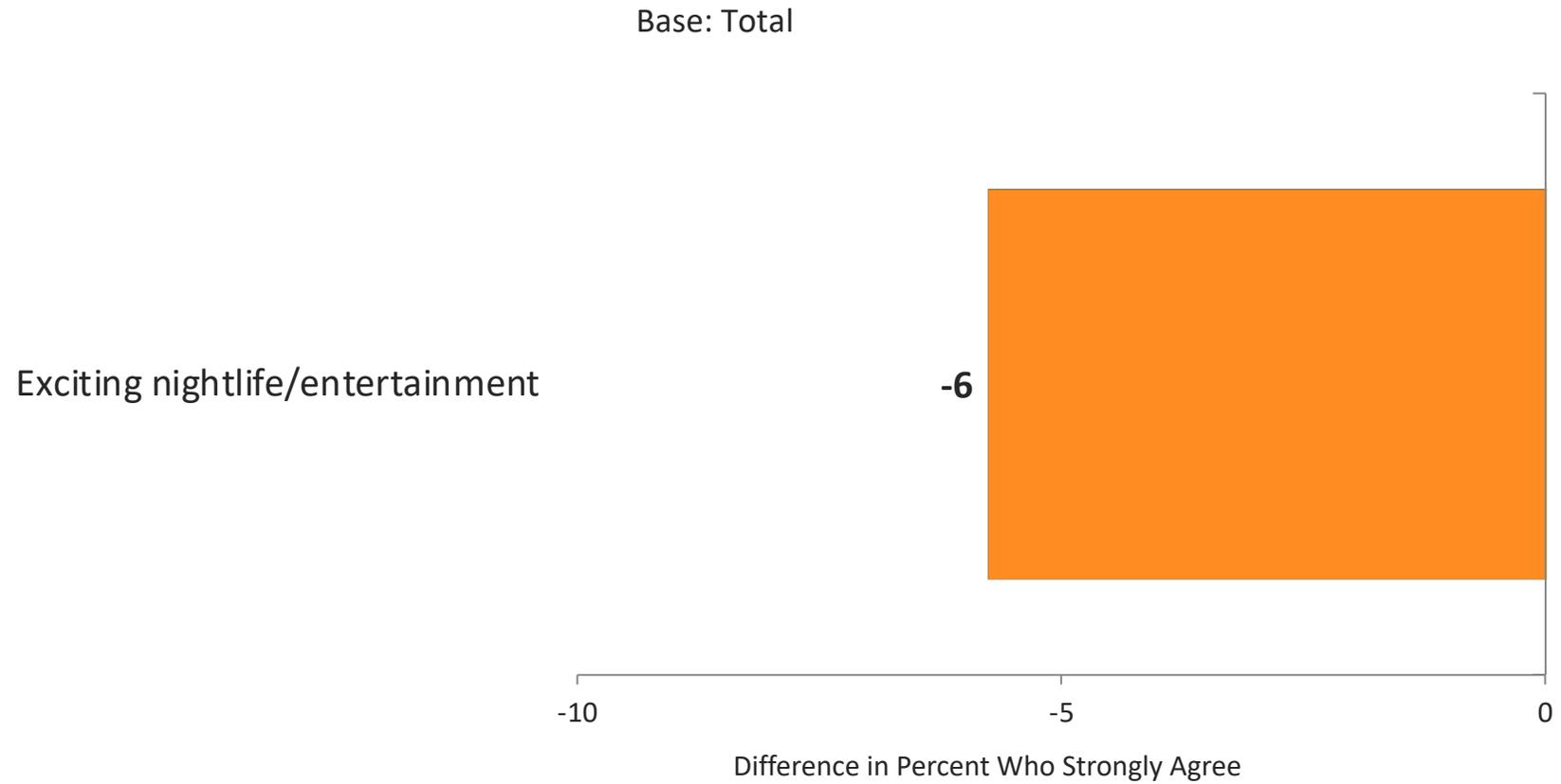
Kentucky's Image vs. Competition — Affordability – Total Markets

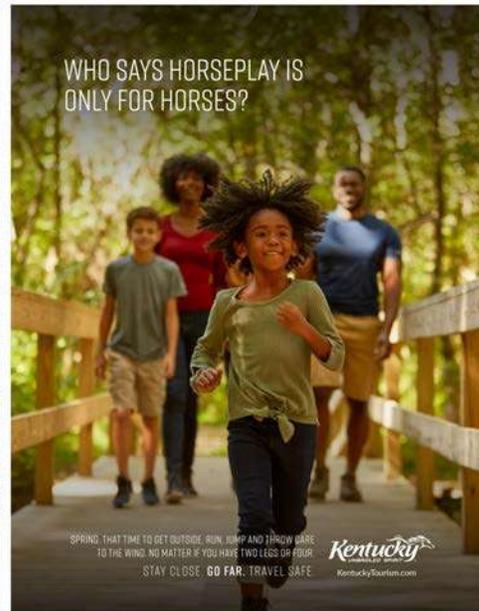
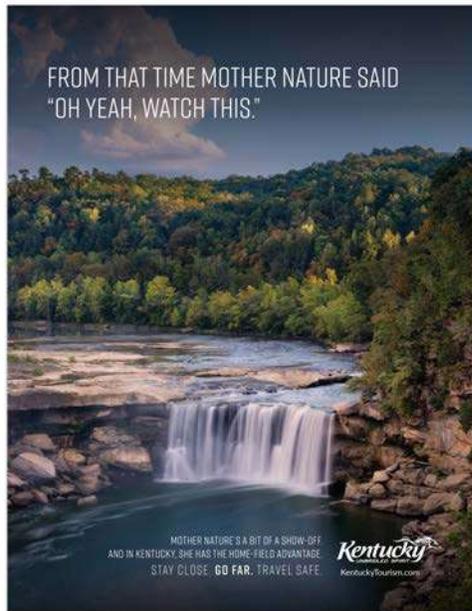


Kentucky's Image Strengths vs. Competition – Total Markets



Kentucky's Image Weaknesses vs. Competition – Total Markets





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Kentucky's Image vs. Competition - Existing Markets

Kentucky's Image – Existing Markets

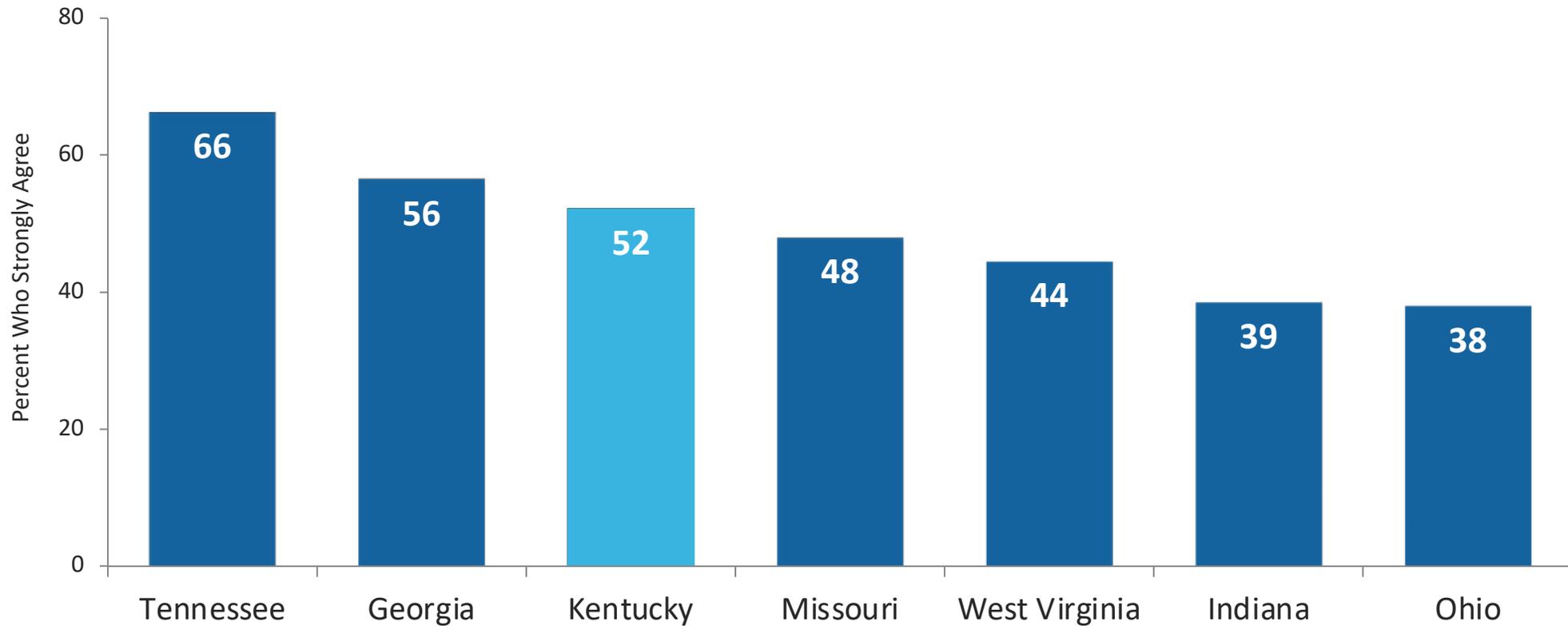
- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their existing advertising markets:
 - Across the existing markets survey, half (52%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
 - Ahead of Missouri, West Virginia, Indiana, and Ohio.
 - Behind Tennessee and Georgia.
- On the other overall image measure, perceptions as being “excellent value for money”, the rank ordering is different:
 - Kentucky (51%) is in second place, trailing Tennessee.
 - Indiana, Missouri, Georgia, West Virginia, and Ohio trail.

Kentucky's Image – Existing Markets (Cont'd)

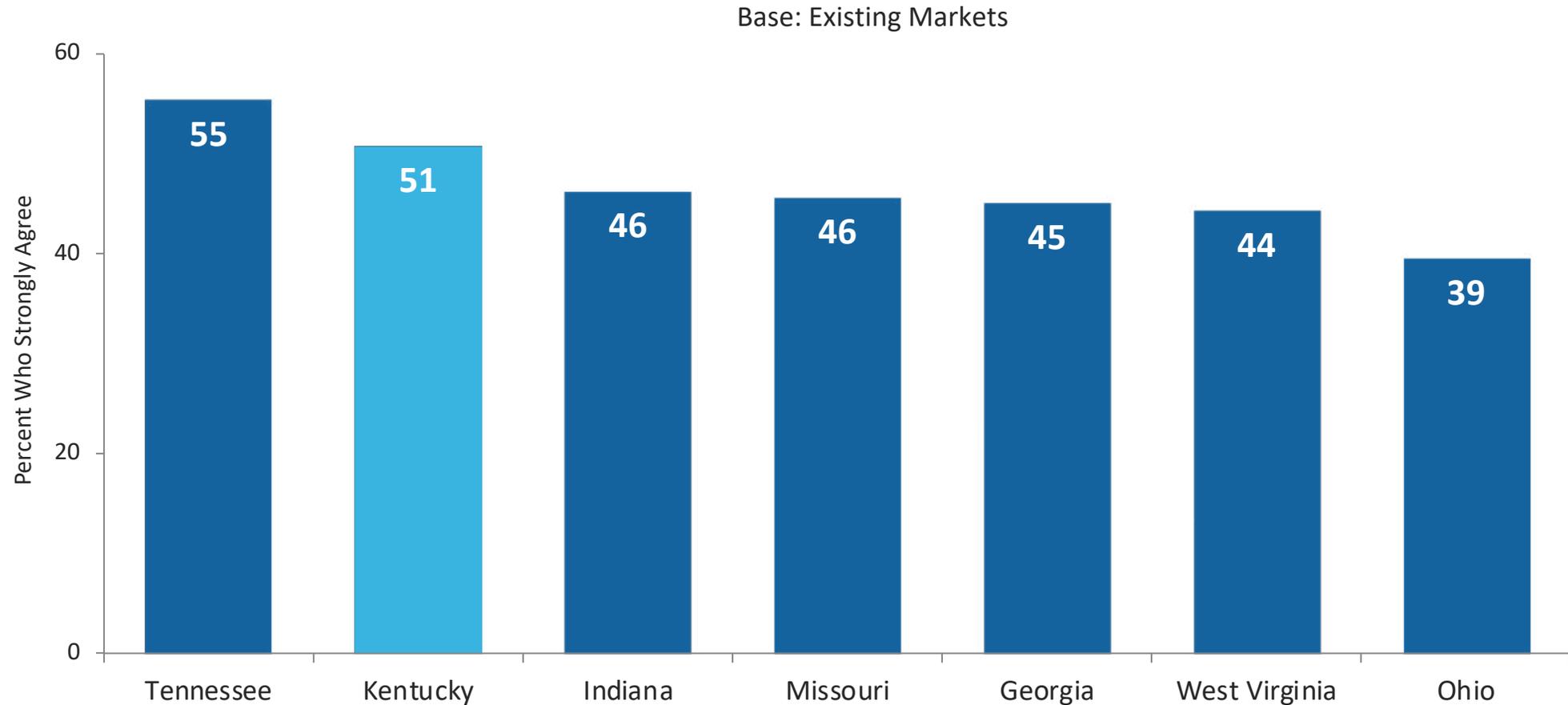
- When comparing Kentucky's image versus the image of the combined competition, Kentucky's top image strengths are:
 - Not too far away
 - Easy to get to
 - Warm, friendly people
 - Good place for camping
 - Good for hiking/backpacking
 - Truly beautiful scenery/setting
 - Affordable to get to
 - Truly unique scenery
 - Getting around the state is easy
 - Affordable accommodations
- The only two weakness Kentucky had in comparison to the combined competitive set was for:
 - Exciting nightlife/entertainment
 - Great for theater and the performing arts

Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting” – Existing Markets

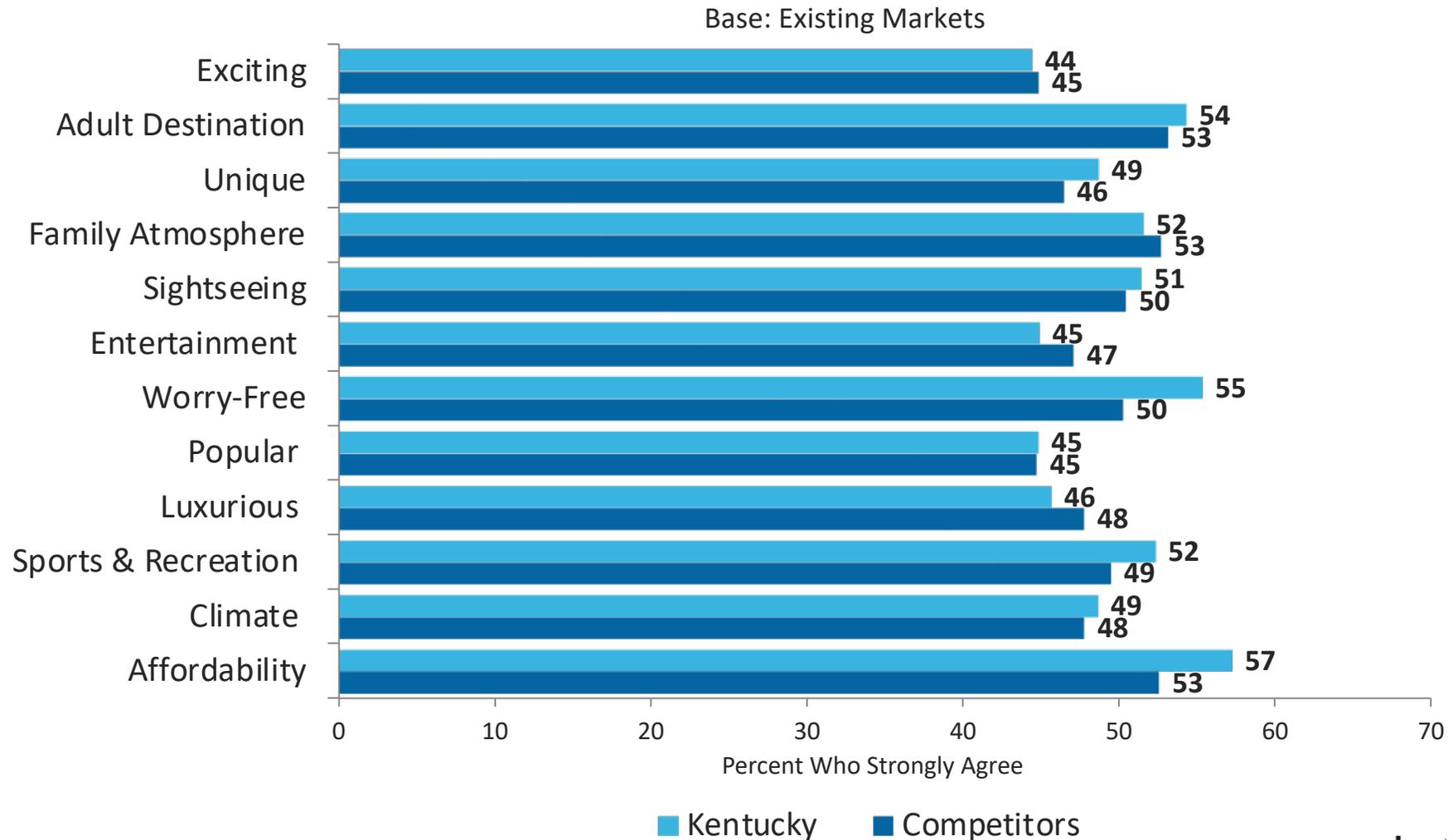
Base: Existing Markets



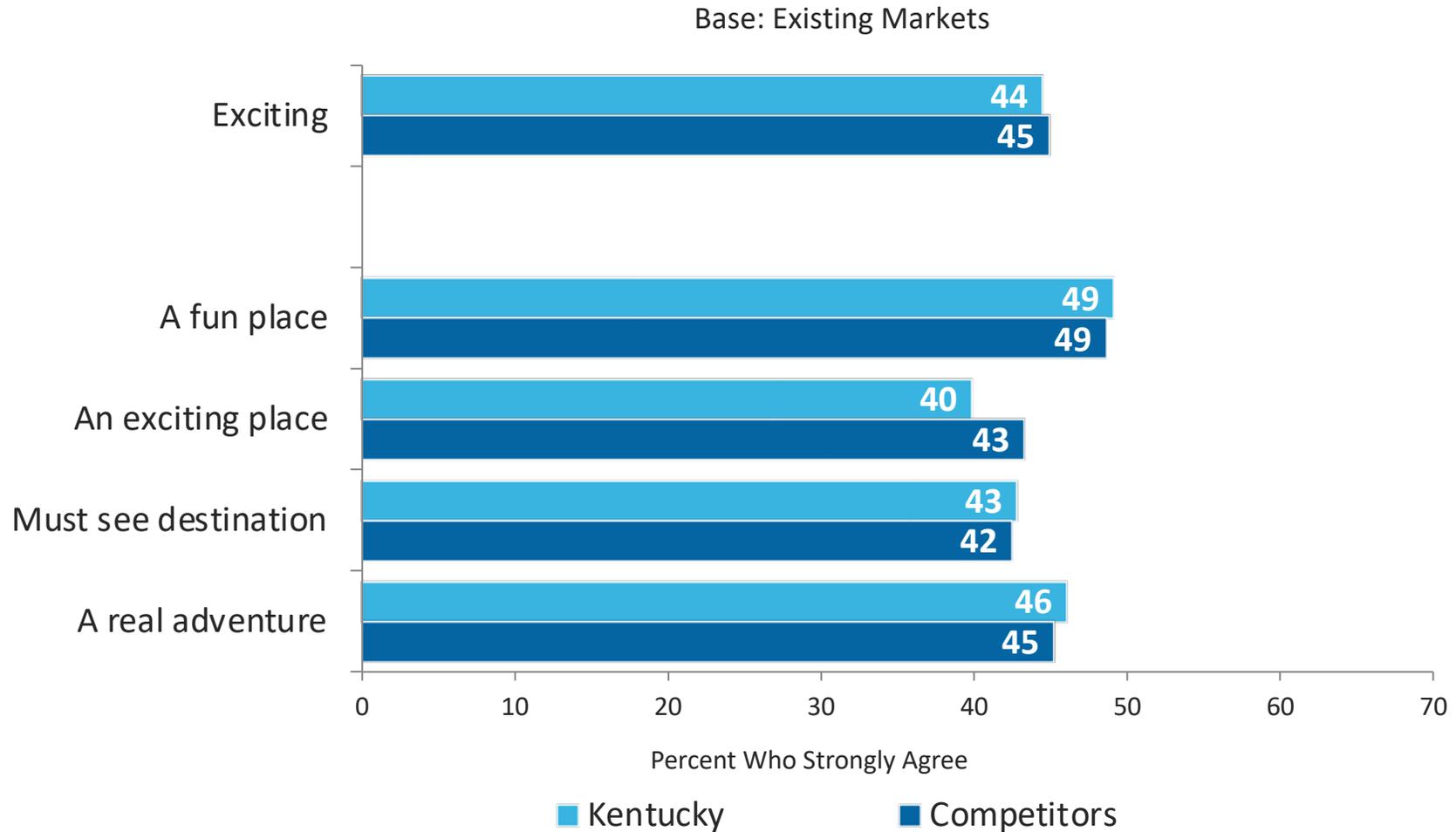
Kentucky Overall Image vs. Competition — “Excellent Value For the Money” – Existing Markets



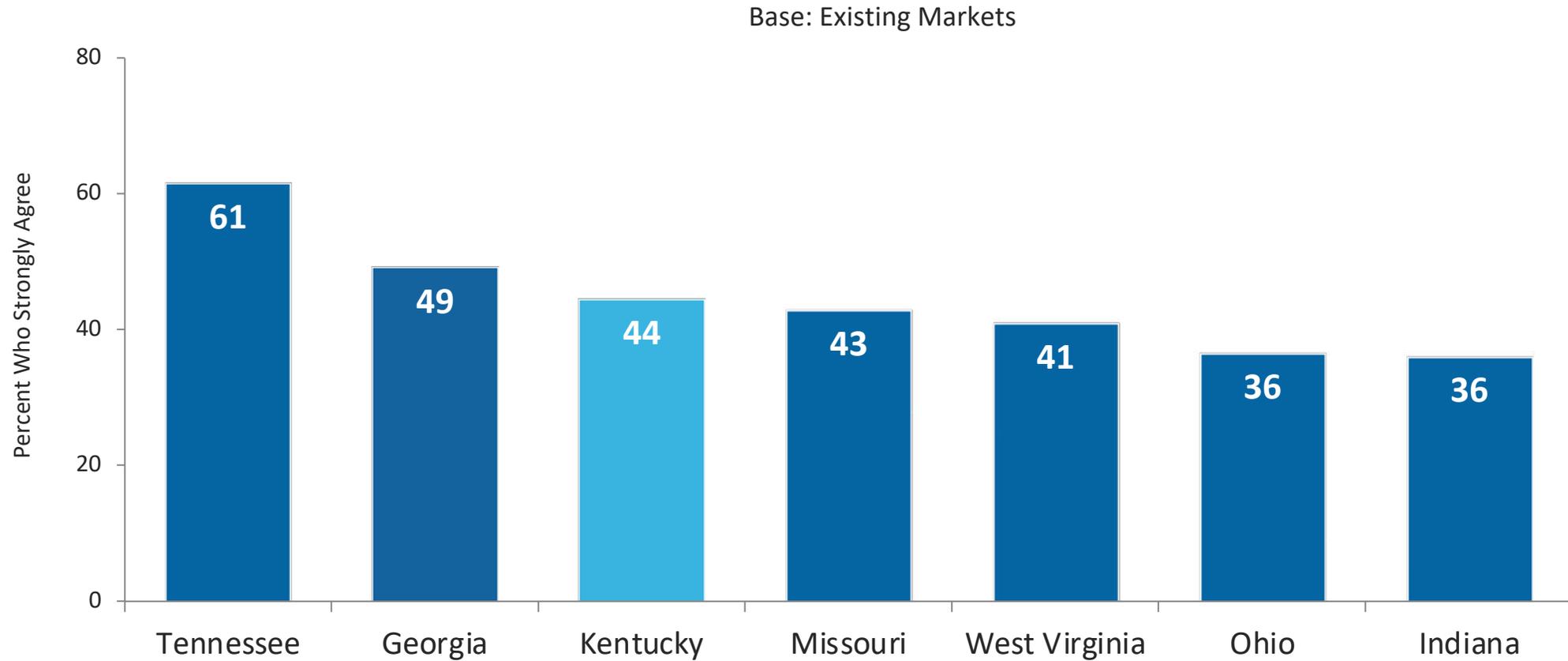
Kentucky's Overall Image vs. Competition – Existing Markets



Kentucky's Image vs. Competition — Exciting – Existing Markets

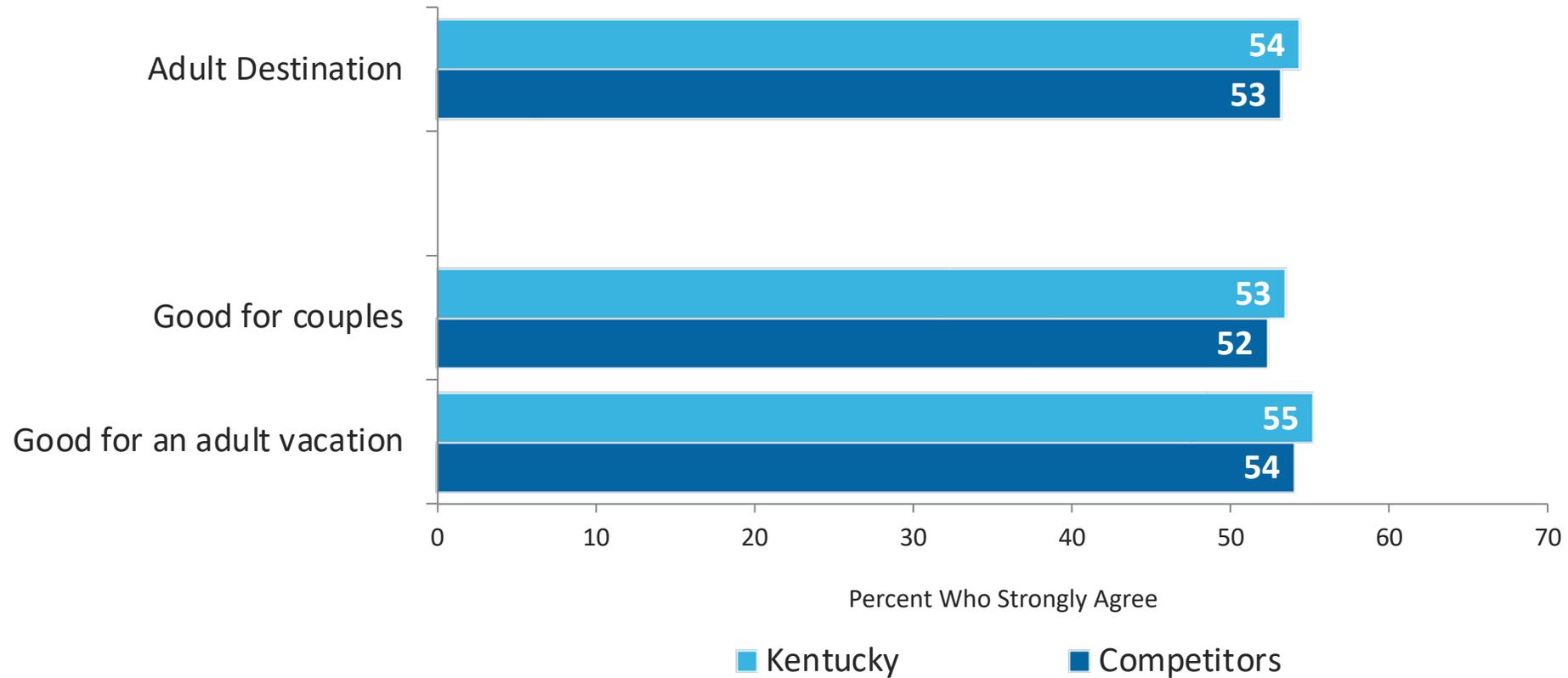


Kentucky's Image vs. Competition — Exciting – Existing Markets

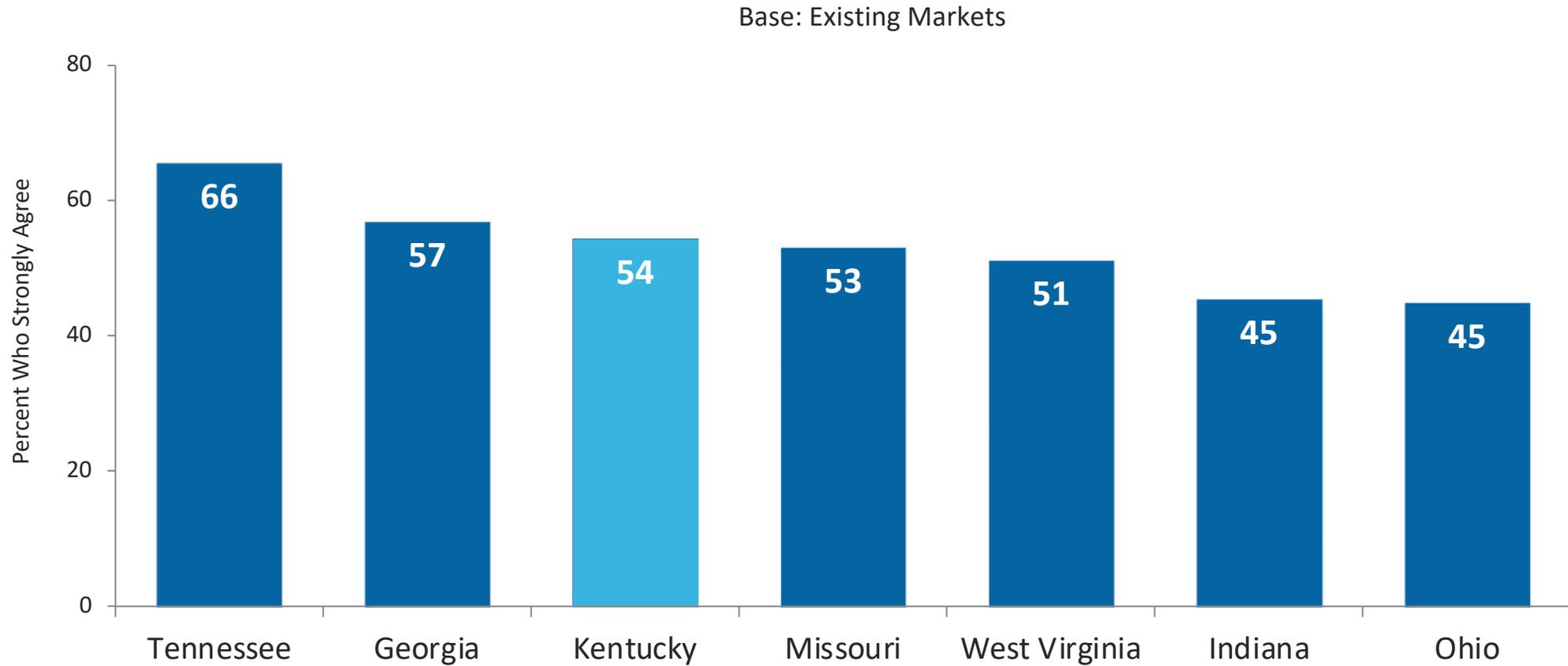


Kentucky's Image vs. Competition — Adult Destination – Existing Markets

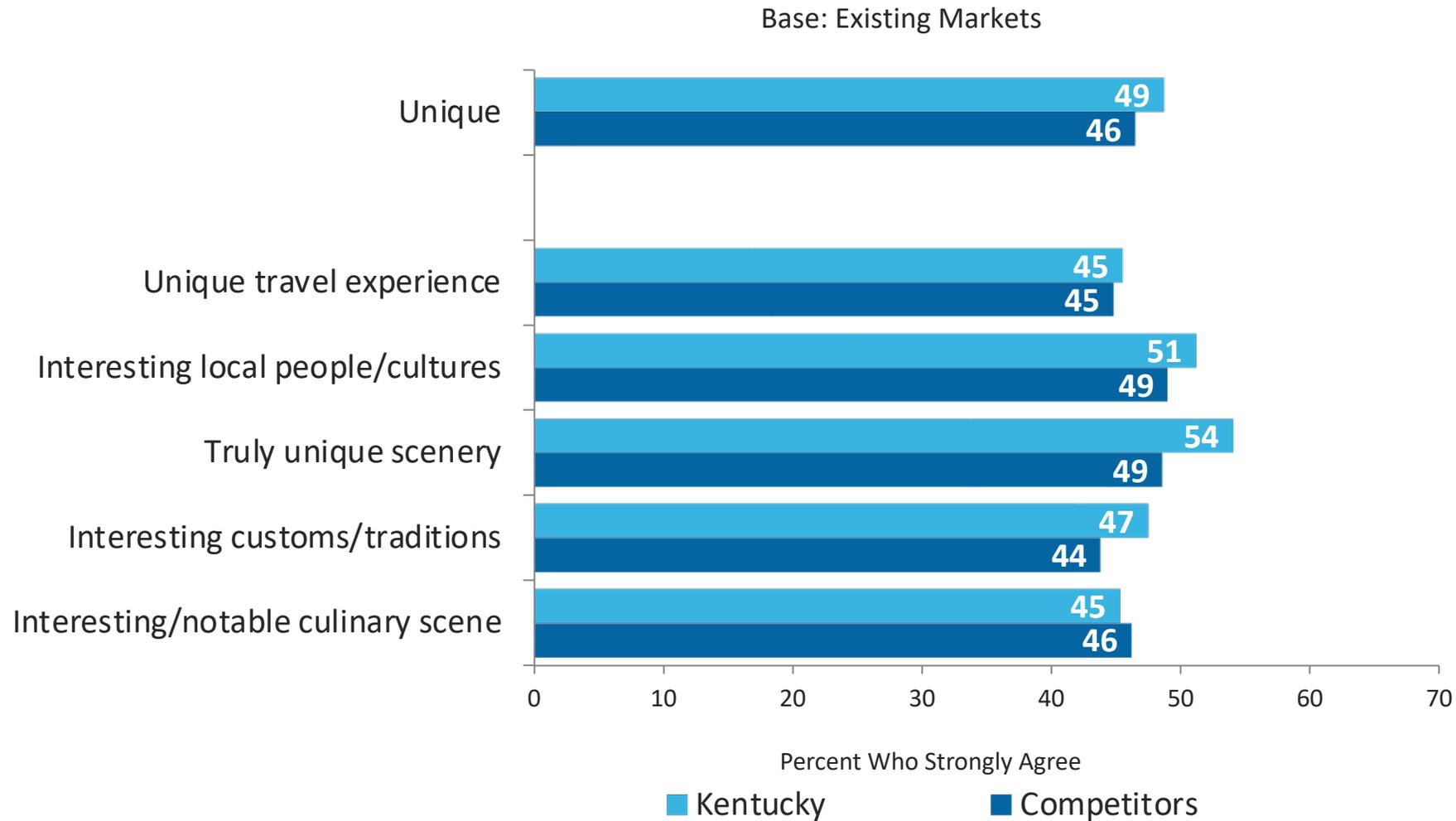
Base: Existing Markets



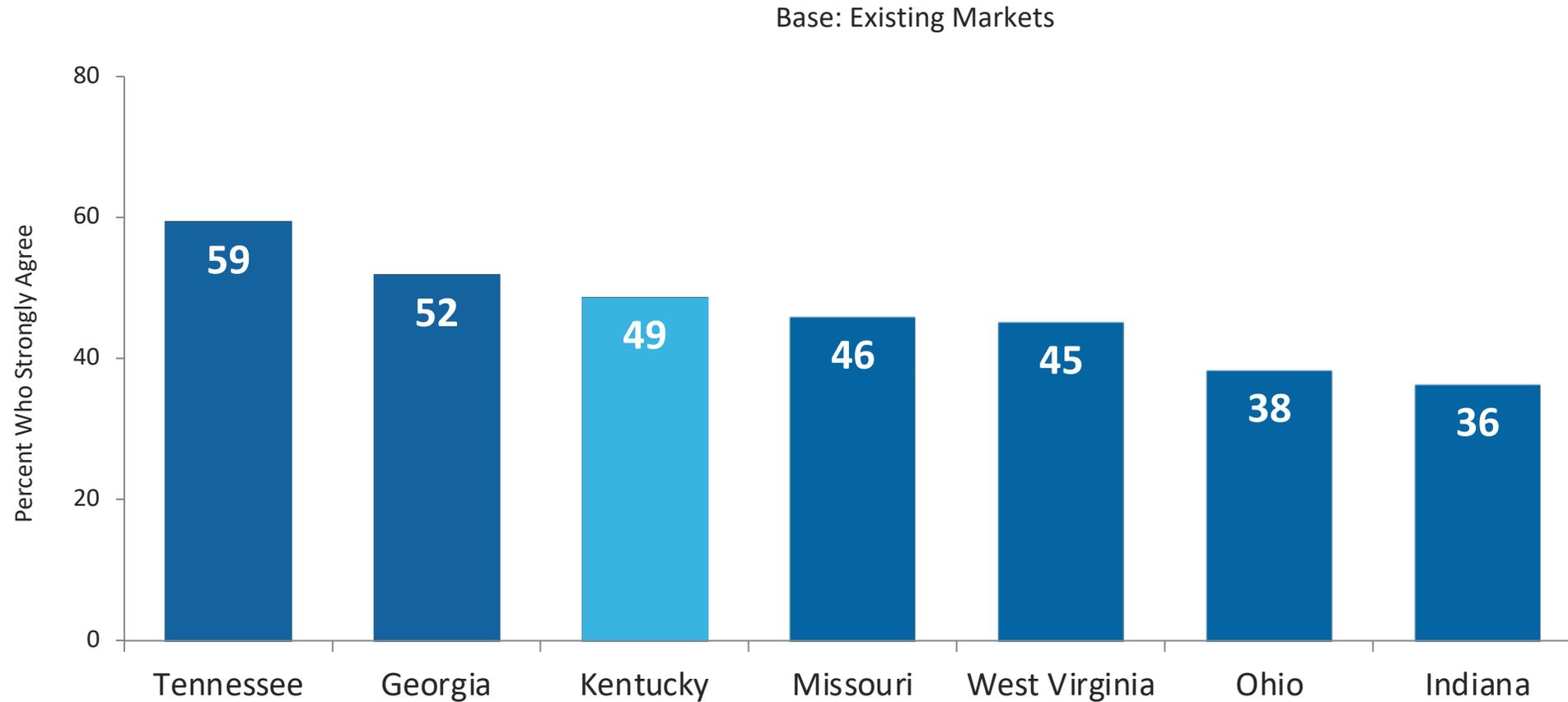
Kentucky's Image vs. Competition — Adult Destination — Existing Markets



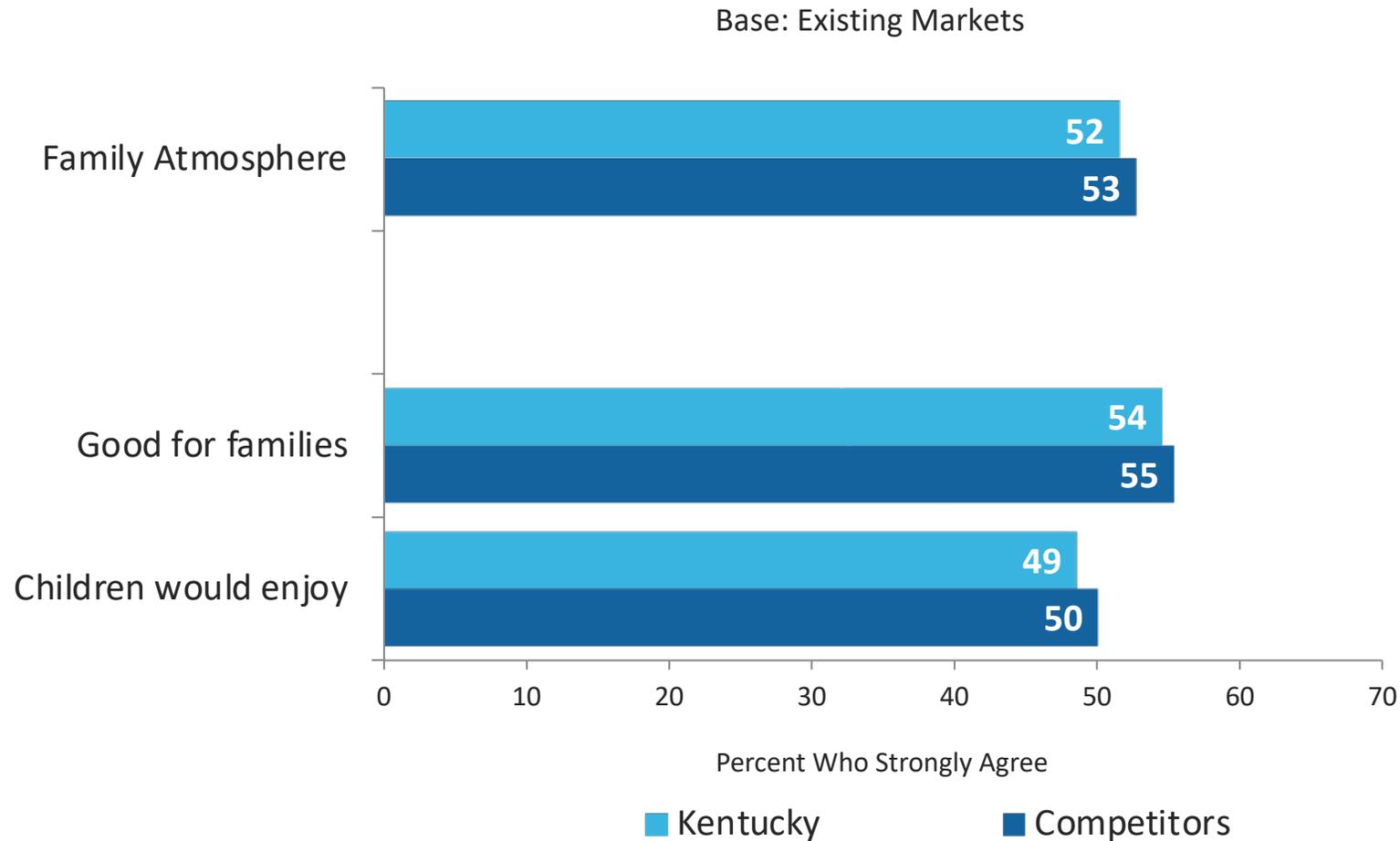
Kentucky's Image vs. Competition — Unique – Existing Markets



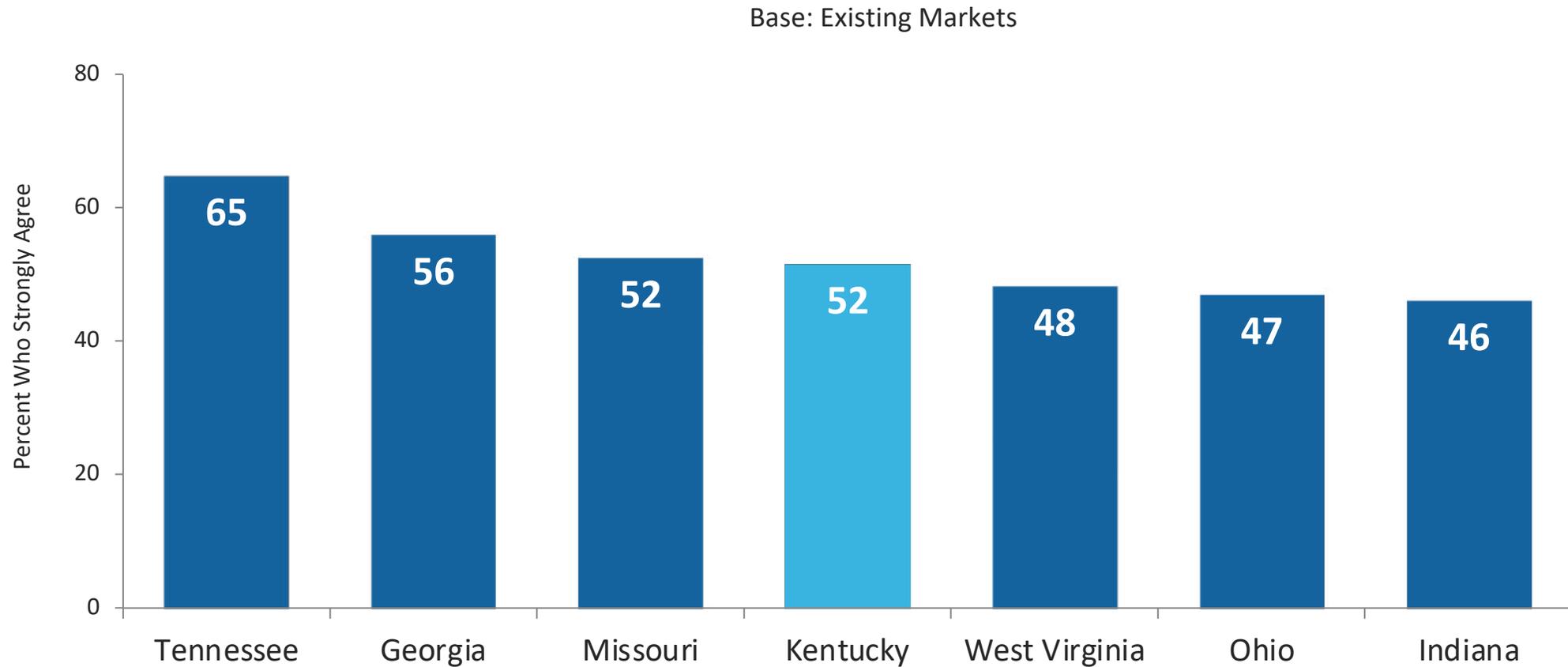
Kentucky's Image vs. Competition — Unique – Existing Markets



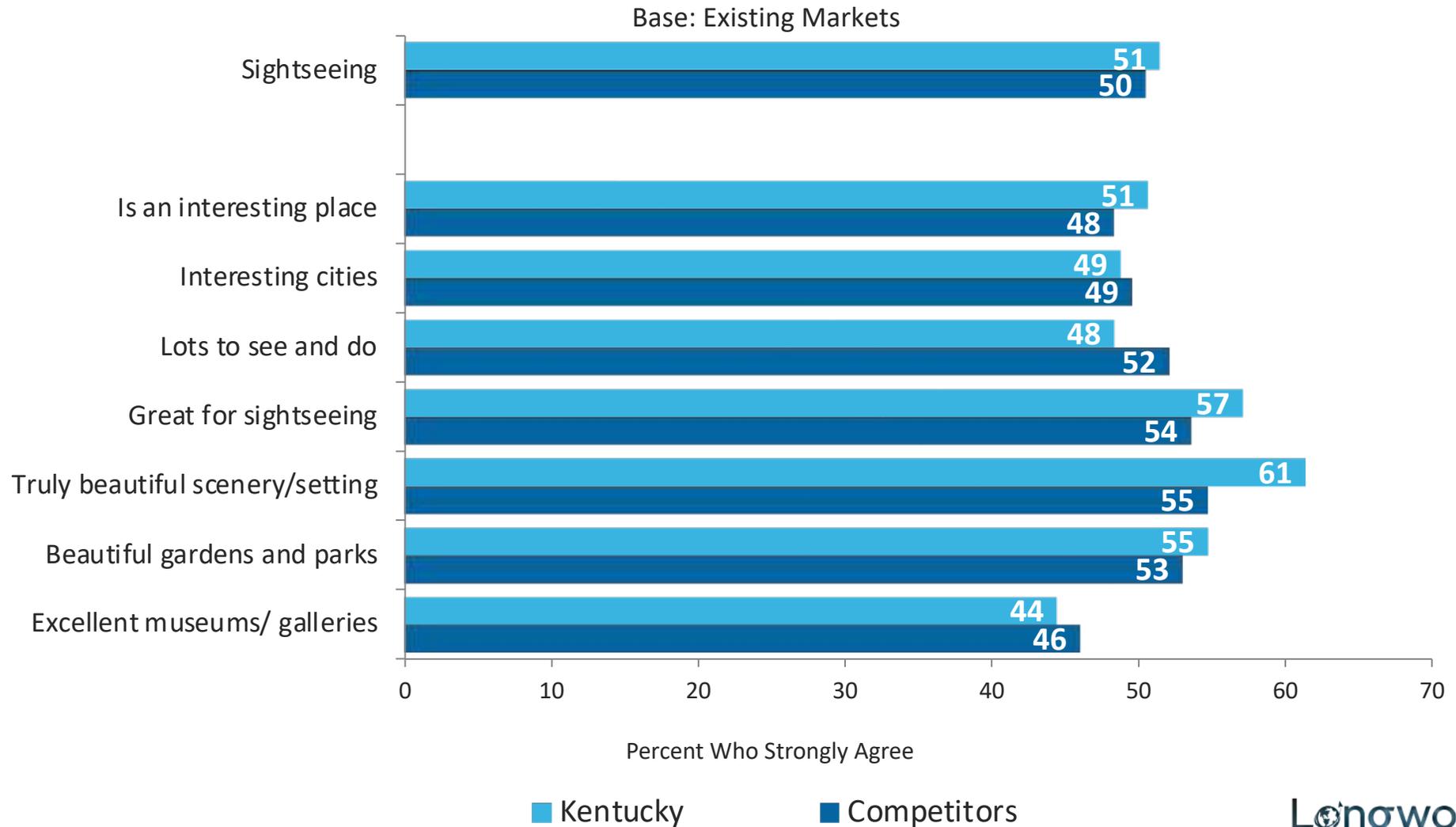
Kentucky's Image vs. Competition — Family Atmosphere – Existing Markets



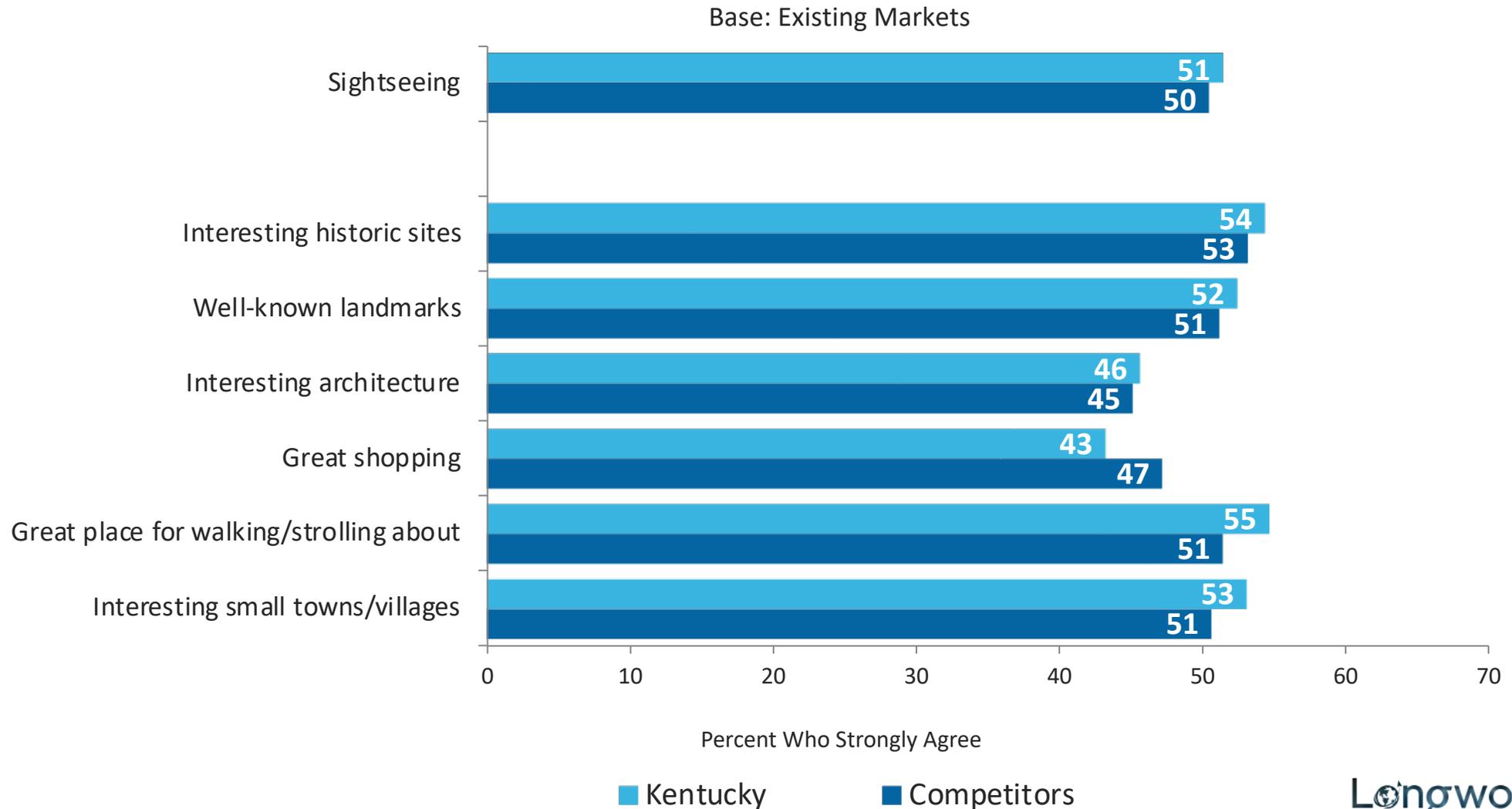
Kentucky's Image vs. Competition — Family Atmosphere — Existing Markets



Kentucky's Image vs. Competition — Sightseeing – Existing Markets

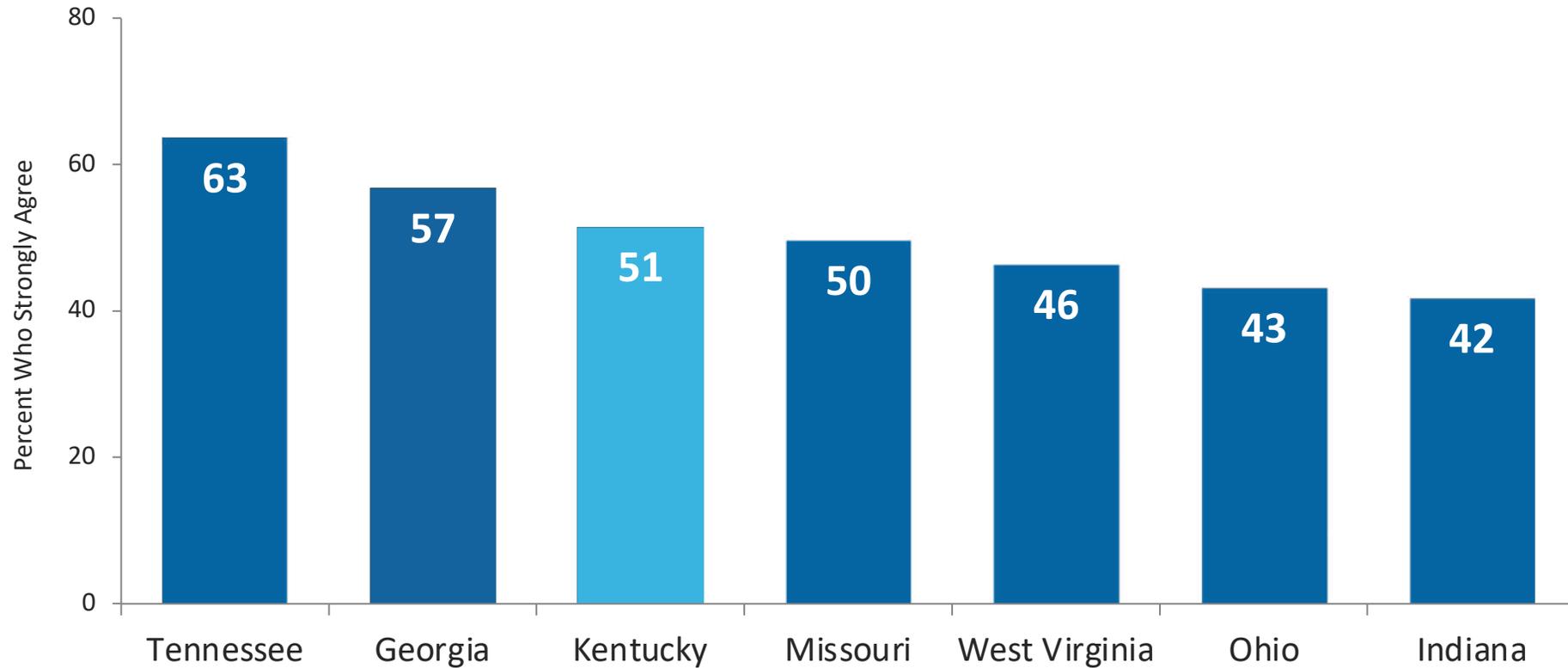


Kentucky's Image vs. Competition — Sightseeing – Existing Markets (Cont'd)

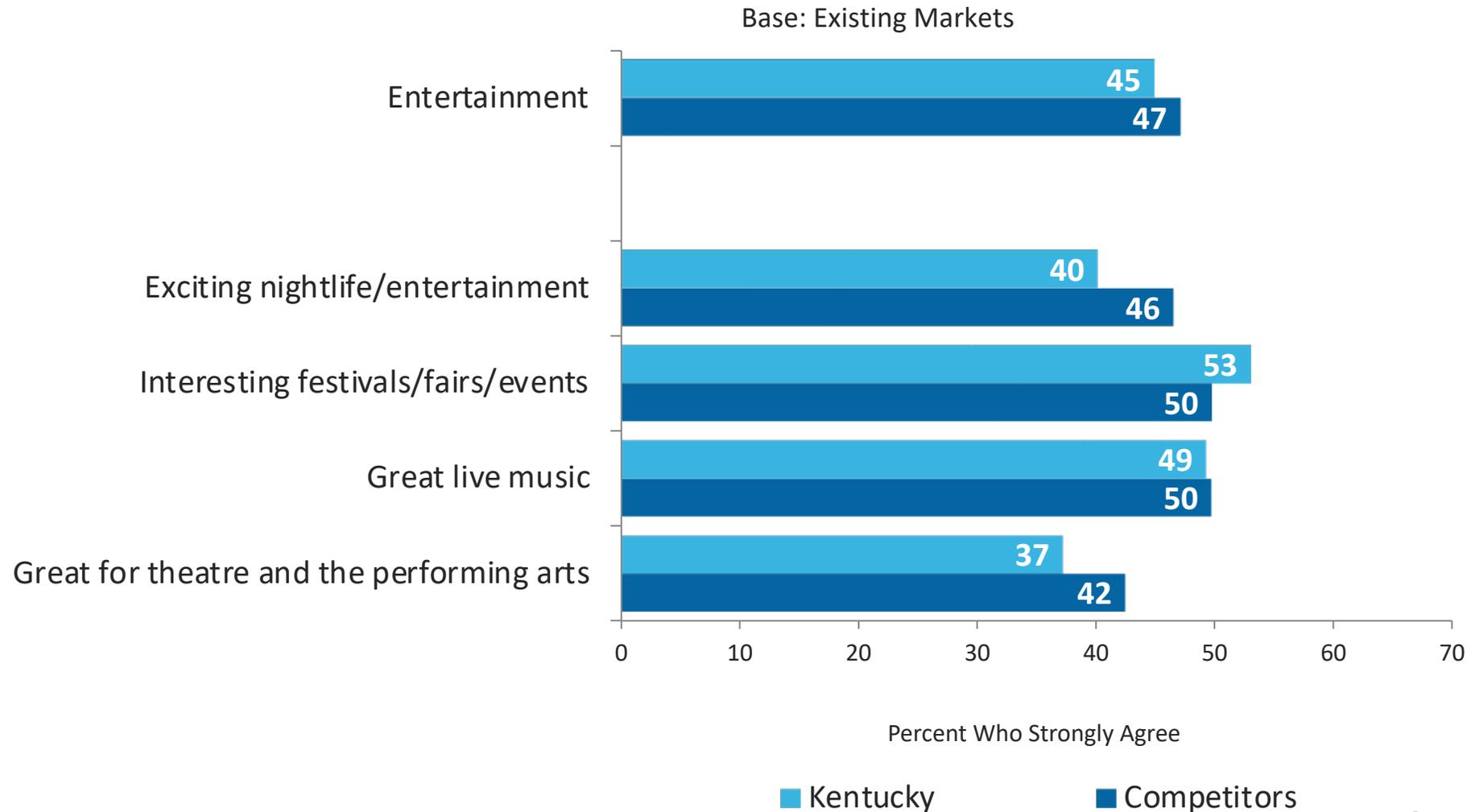


Kentucky's Image vs. Competition — Sightseeing – Existing Markets

Base: Existing Markets

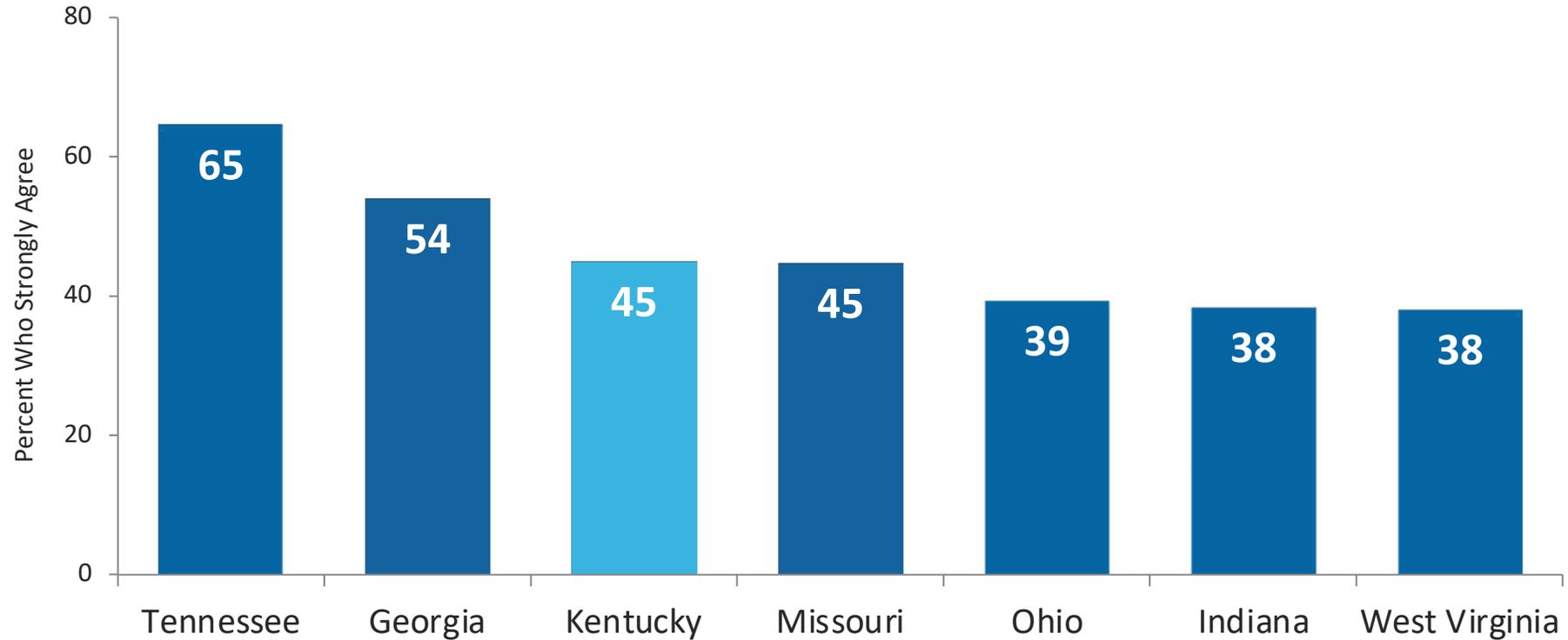


Kentucky's Image vs. Competition — Entertainment – Existing Markets

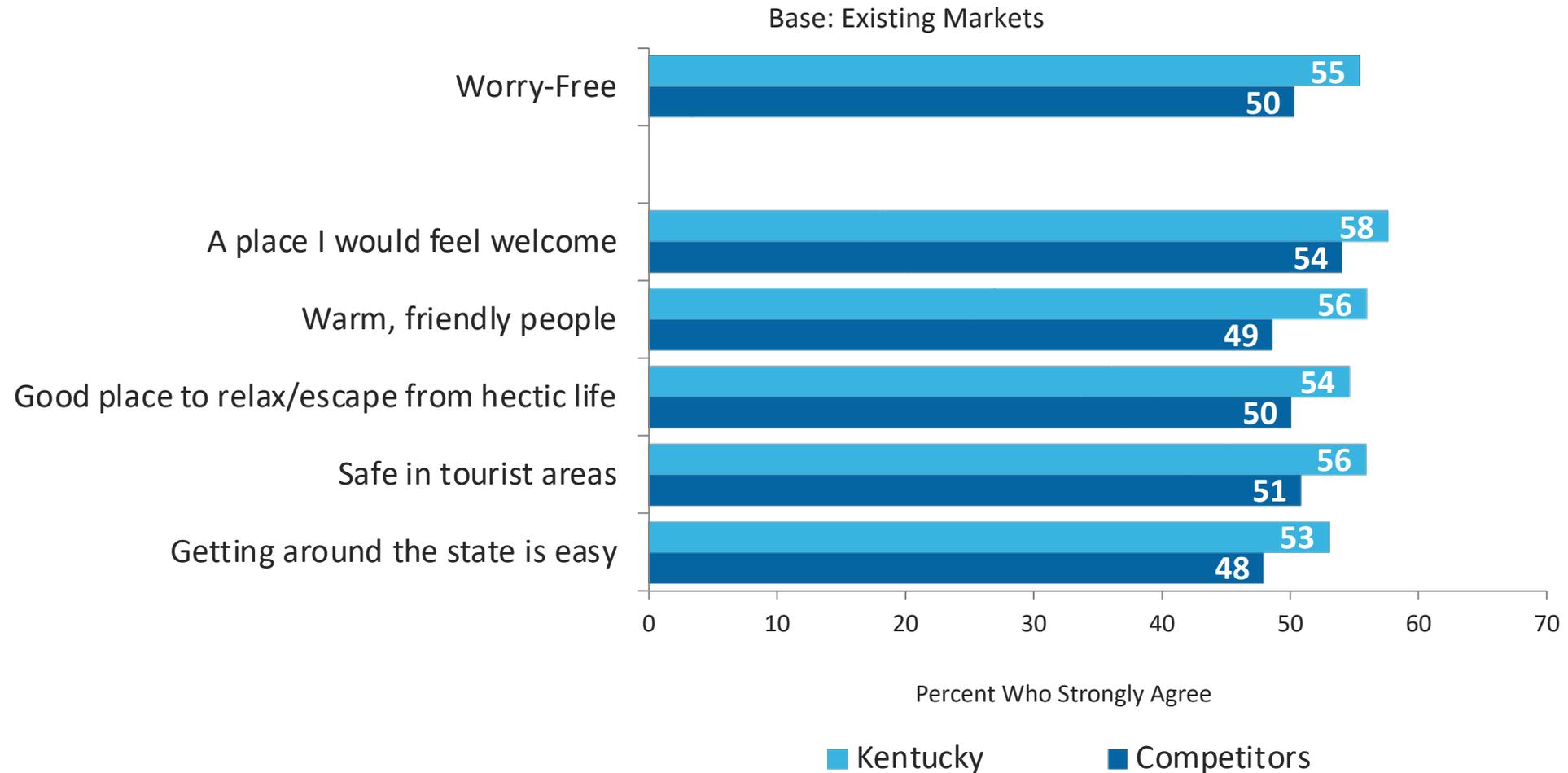


Kentucky's Image vs. Competition — Entertainment — Existing Markets

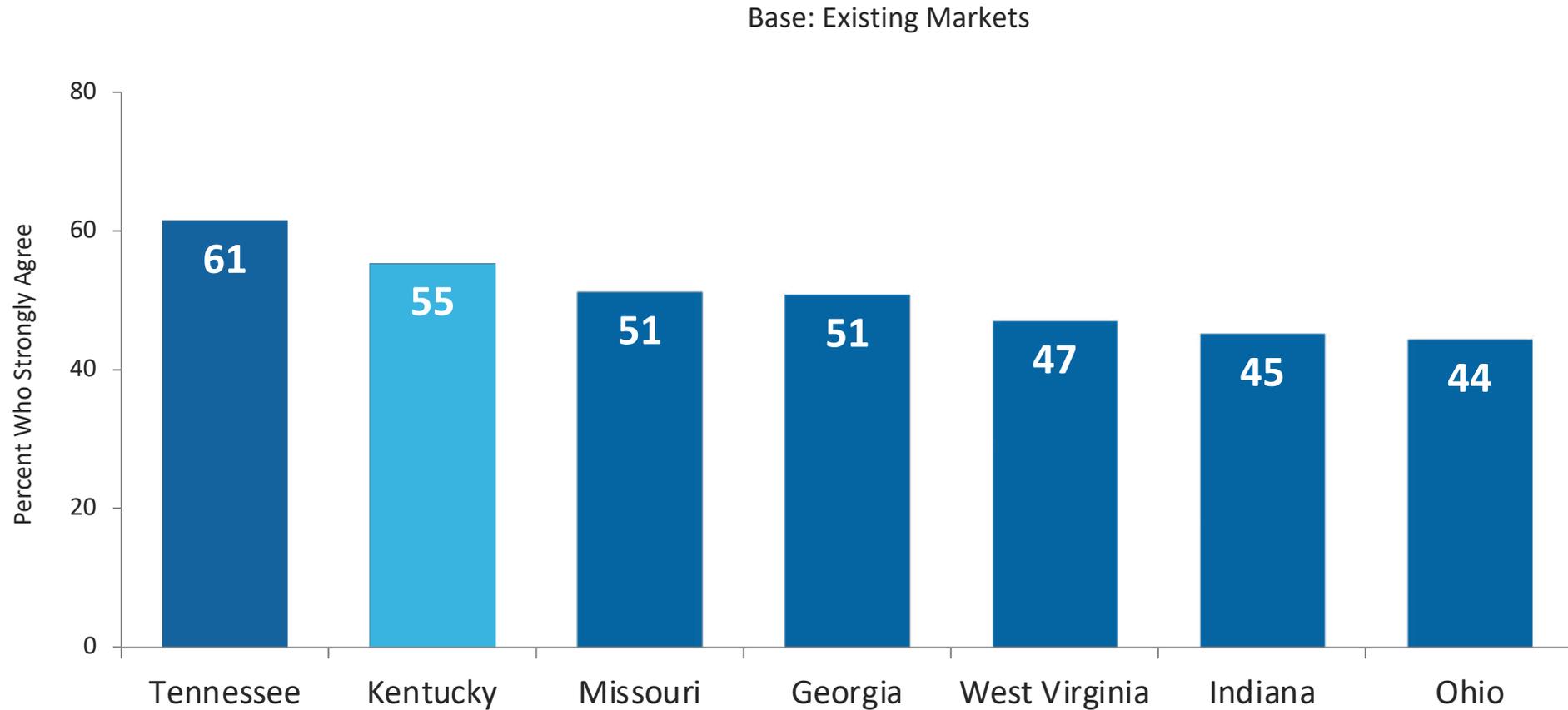
Base: Existing Markets



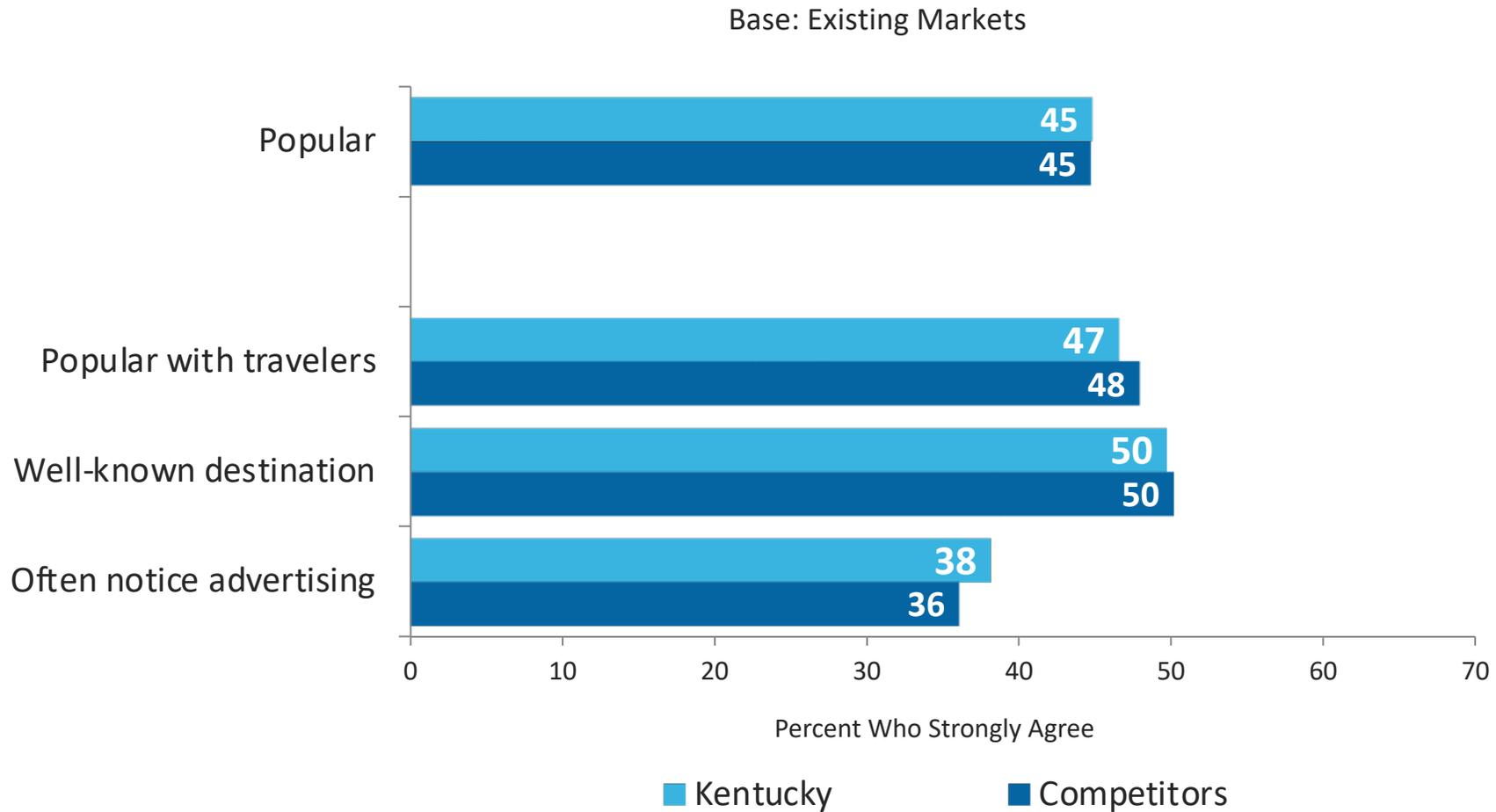
Kentucky's Image vs. Competition — Worry-Free – Existing Markets



Kentucky's Image vs. Competition — Worry-Free — Existing Markets

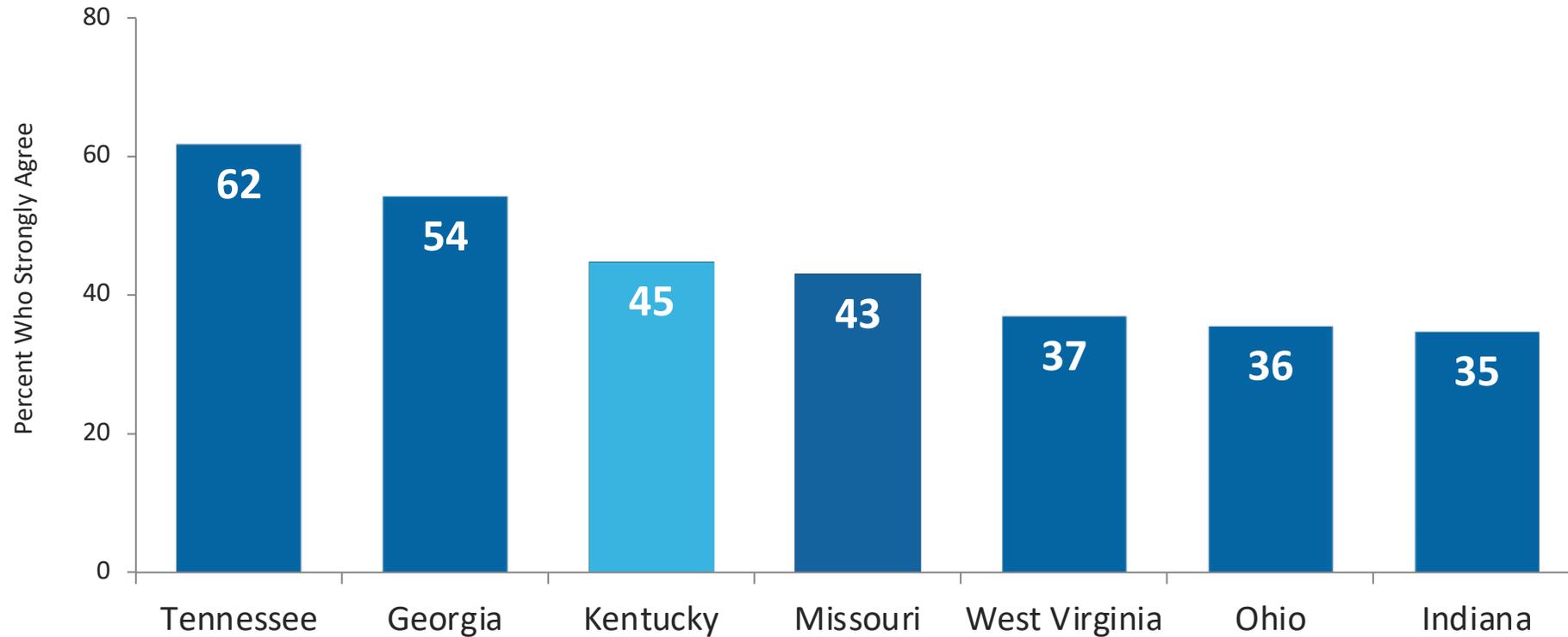


Kentucky's Image vs. Competition — Popular – Existing Markets

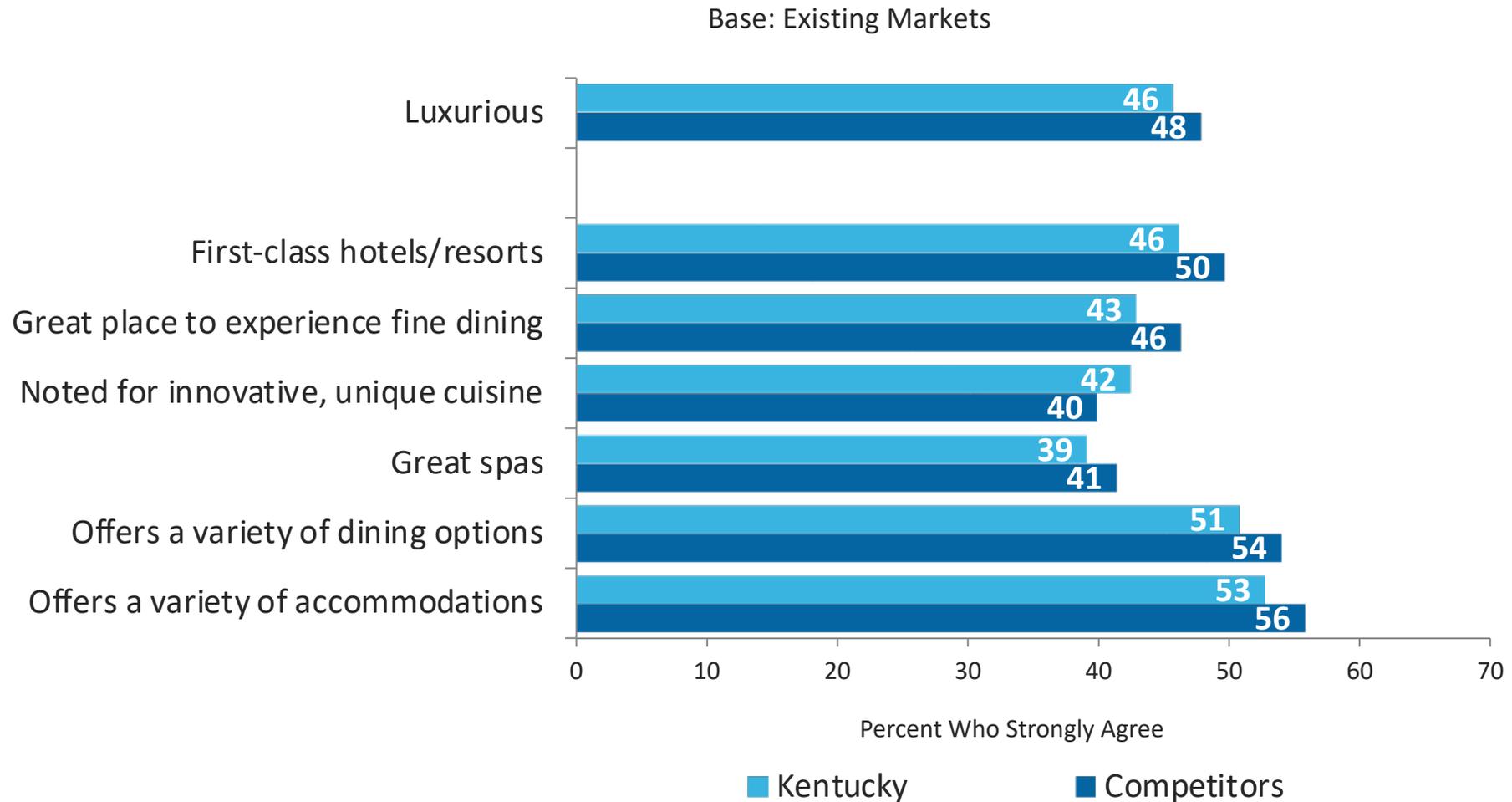


Kentucky's Image vs. Competition — Popular — Existing Markets

Base: Existing Markets

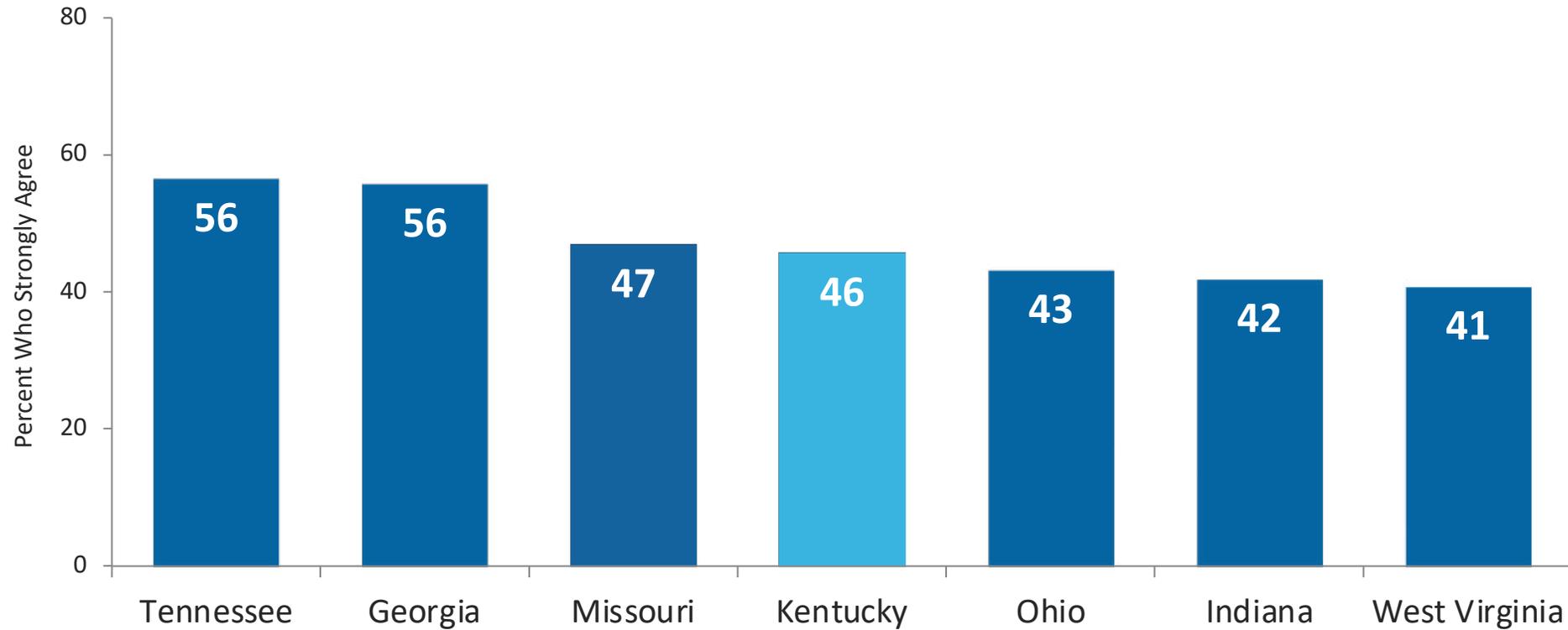


Kentucky's Image vs. Competition — Luxurious — Existing Markets

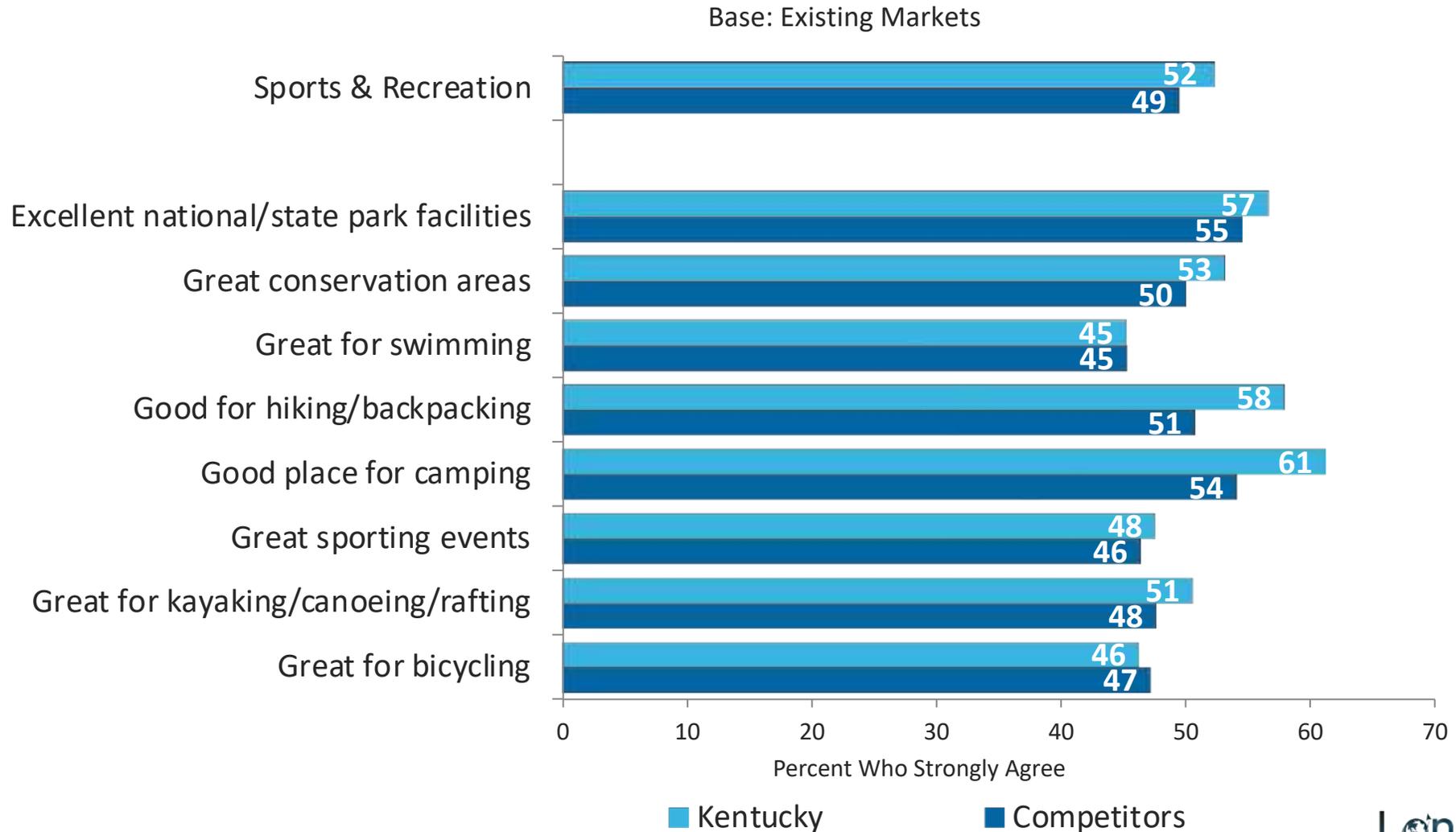


Kentucky's Image vs. Competition — Luxurious — Existing Markets

Base: Existing Markets

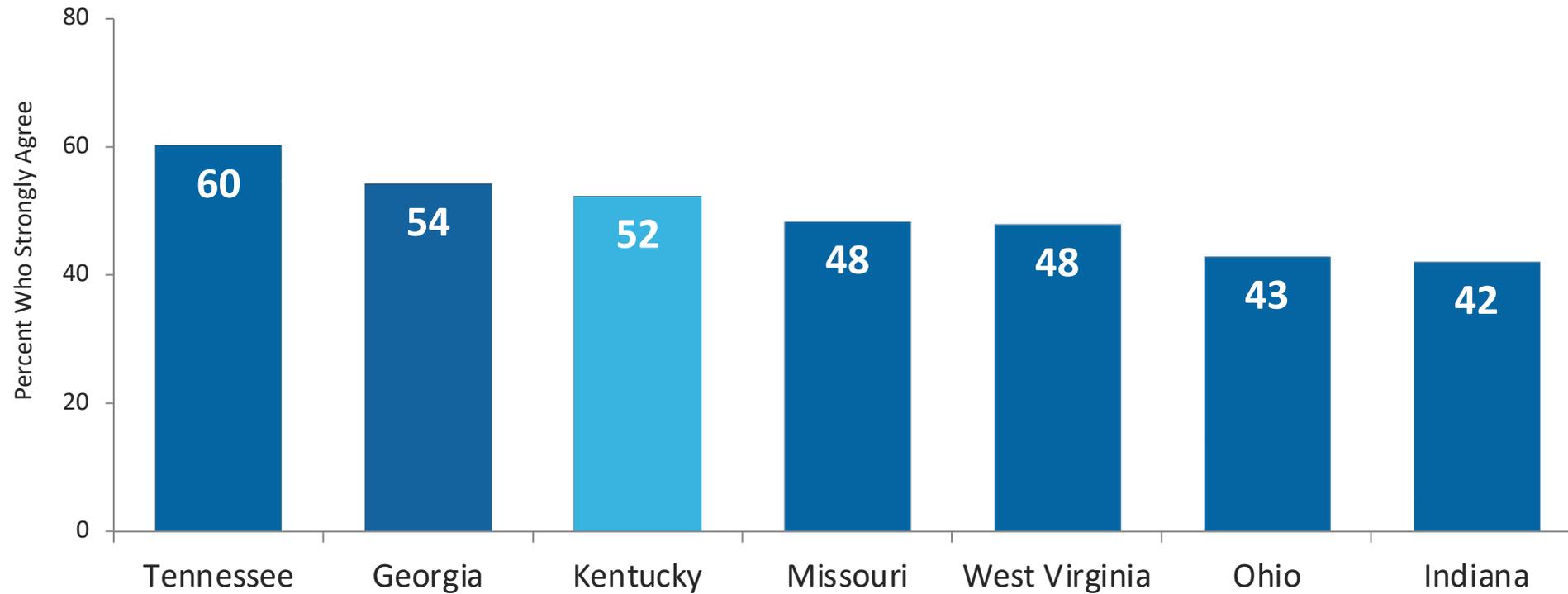


Kentucky's Image vs. Competition — Sports & Recreation – Existing Markets

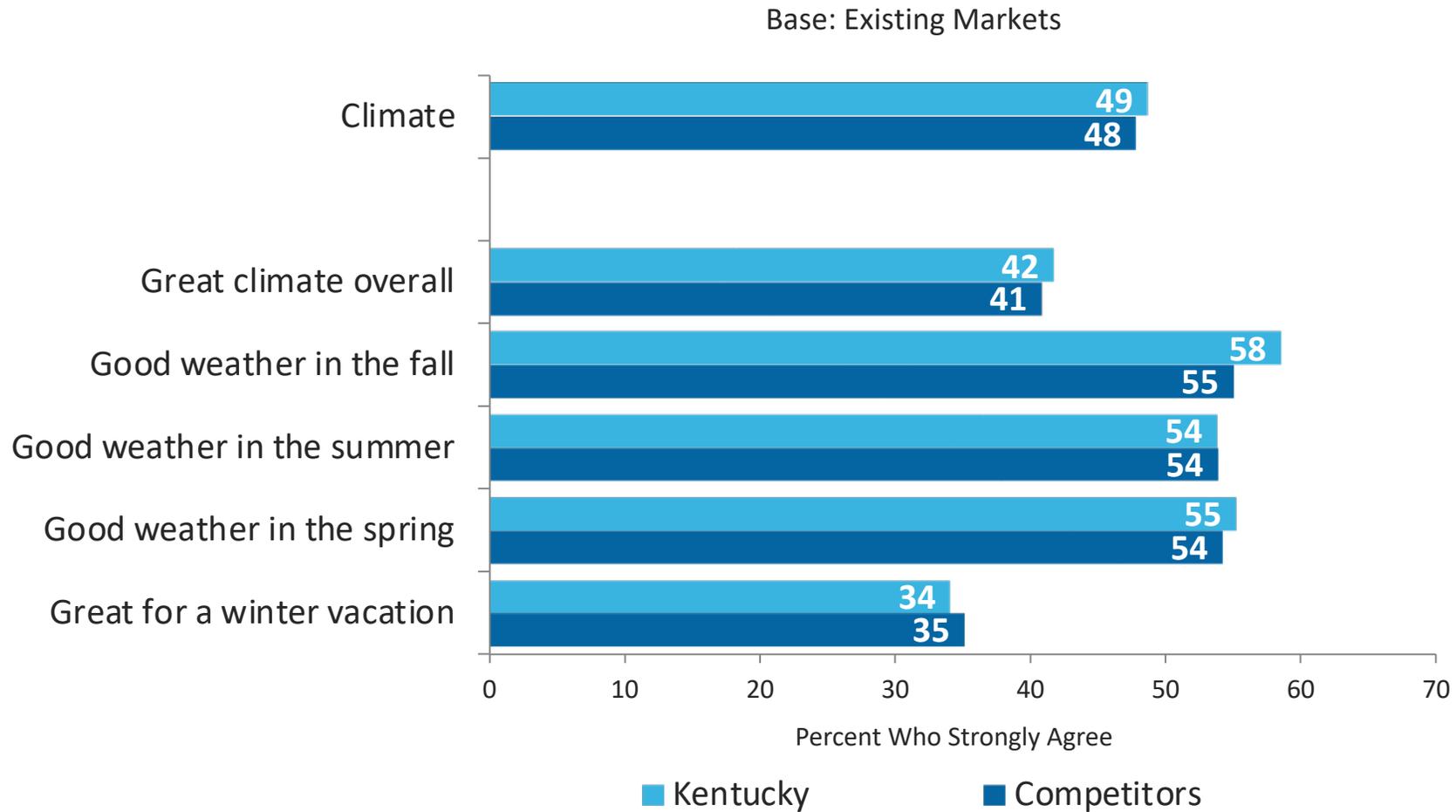


Kentucky's Image vs. Competition — Sports & Recreation – Existing Markets

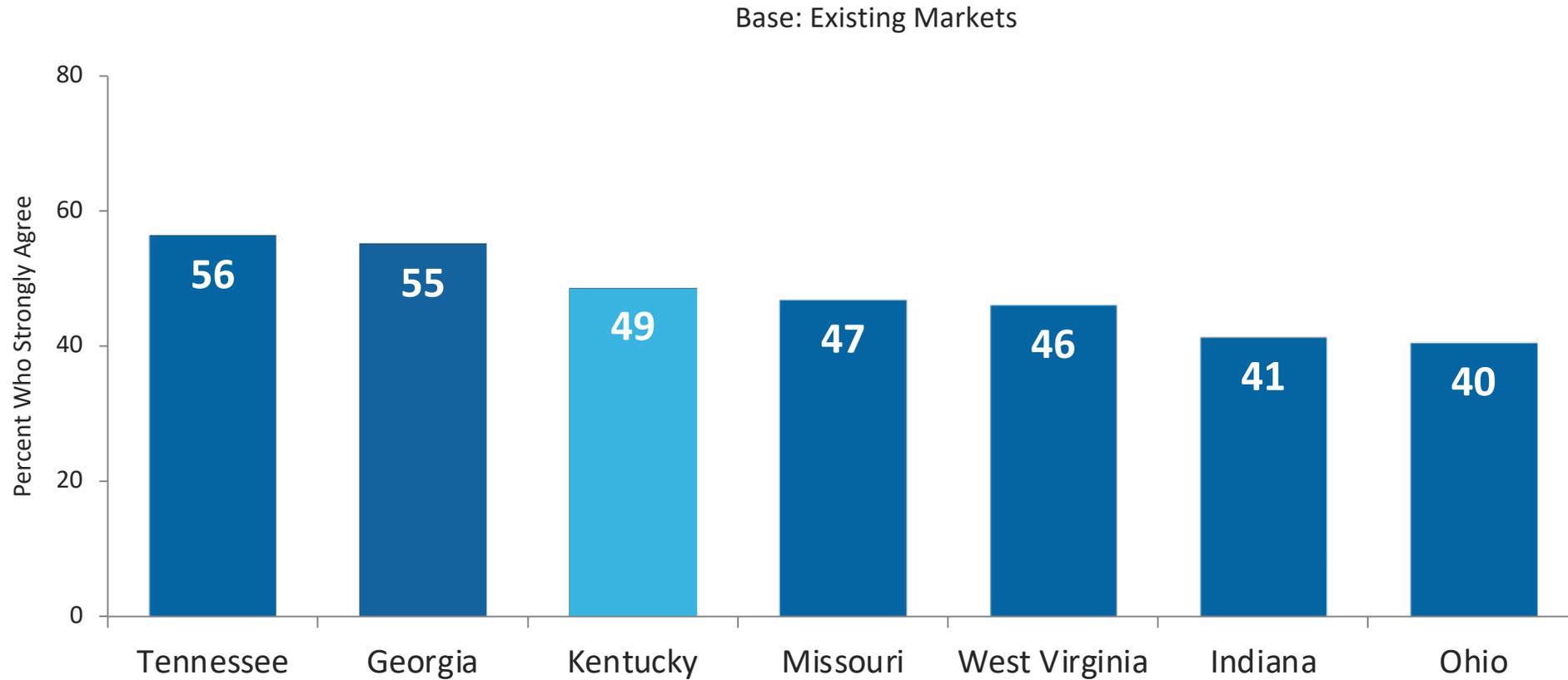
Base: Existing Markets



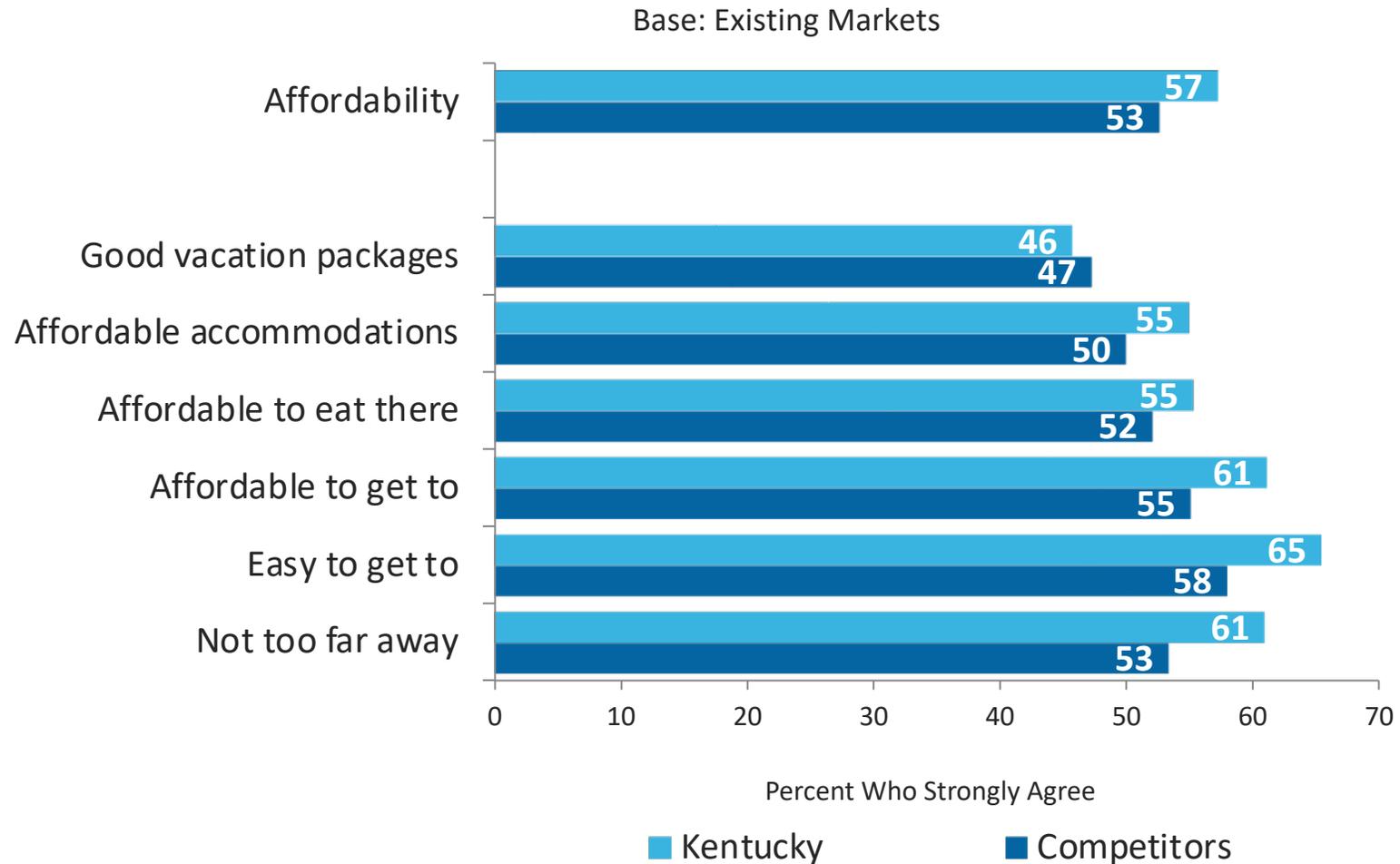
Kentucky's Image vs. Competition — Climate – Existing Markets



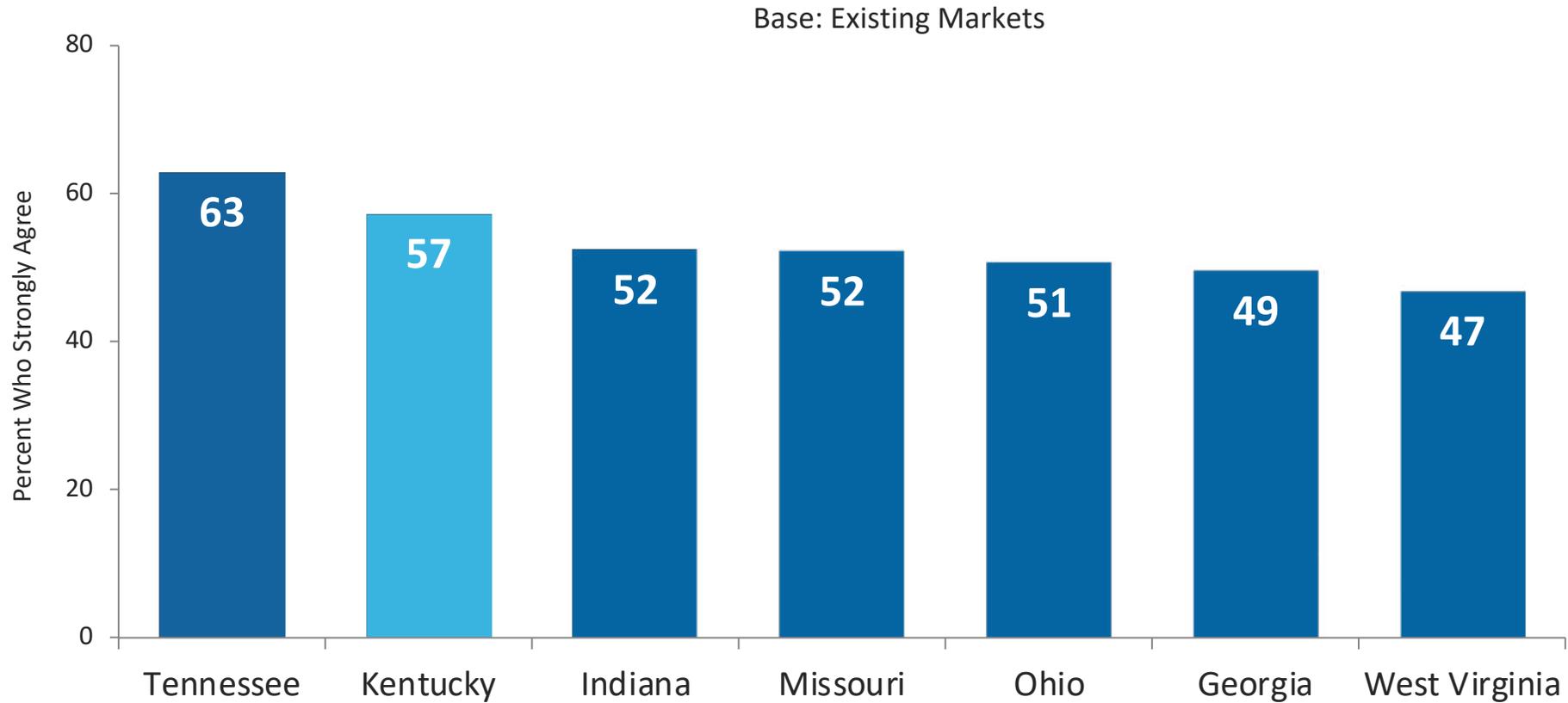
Kentucky's Image vs. Competition — Climate – Existing Markets



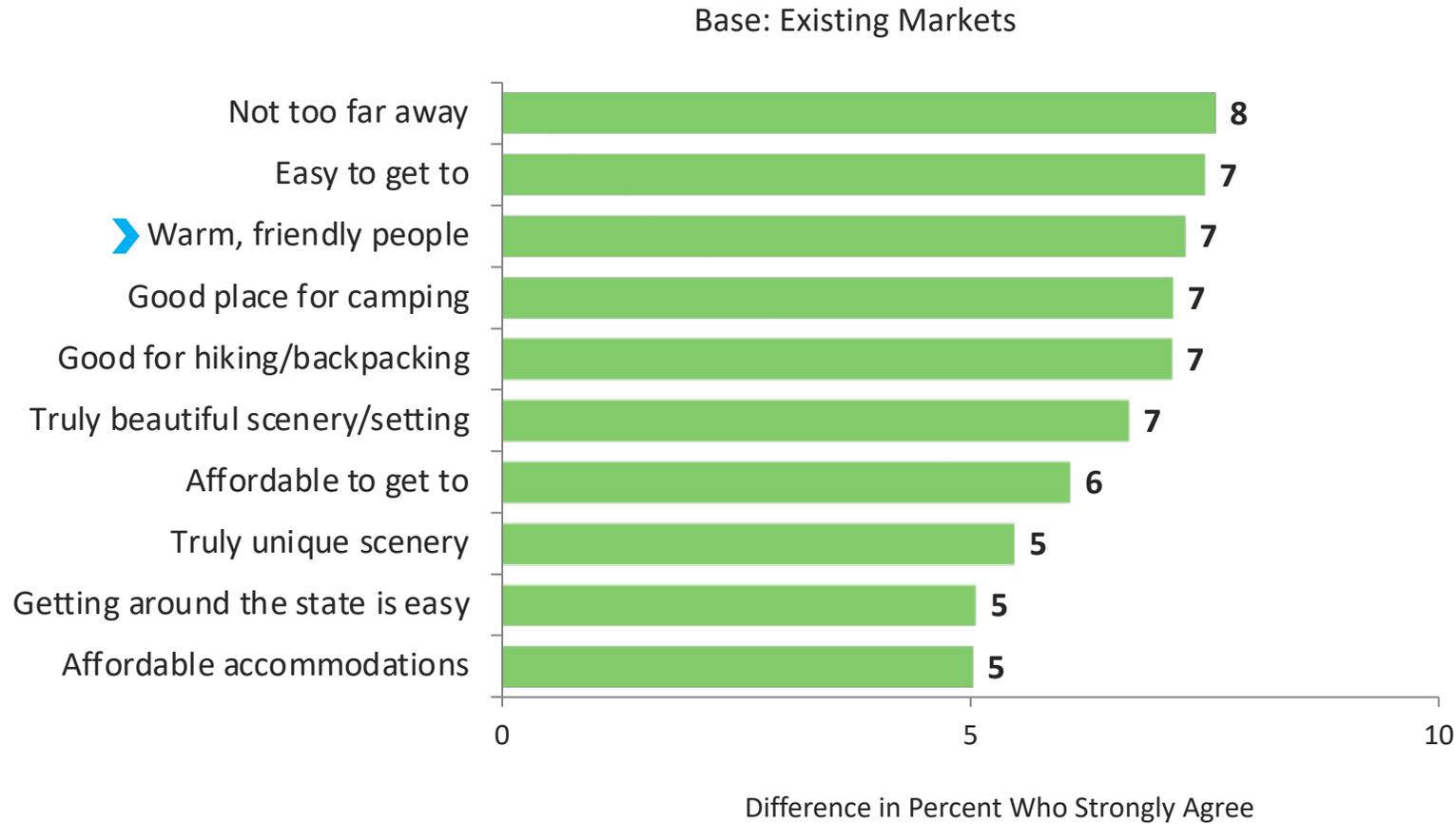
Kentucky's Image vs. Competition — Affordability – Existing Markets



Kentucky's Image vs. Competition — Affordability — Existing Markets

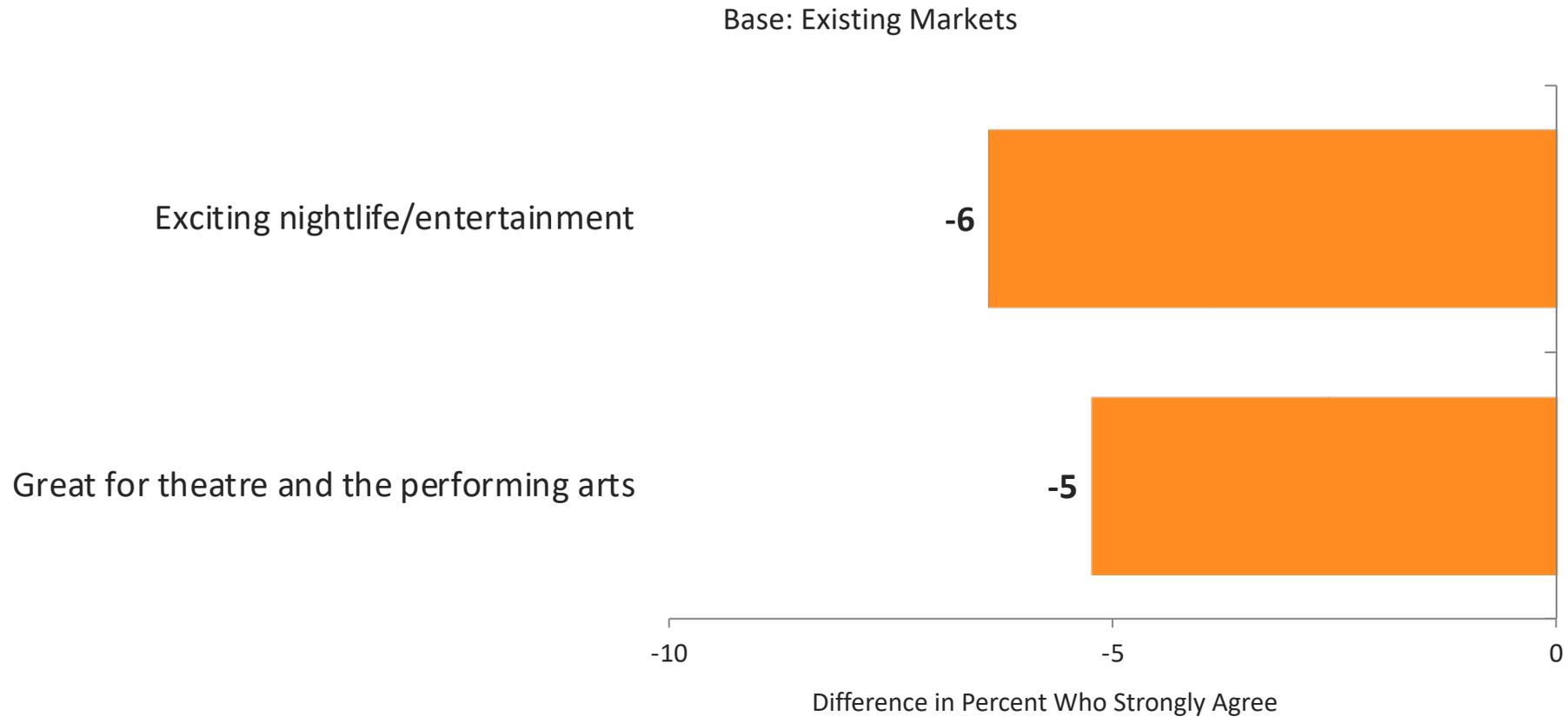


Kentucky's Image Strengths vs. Competition – Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Competition – Existing Markets





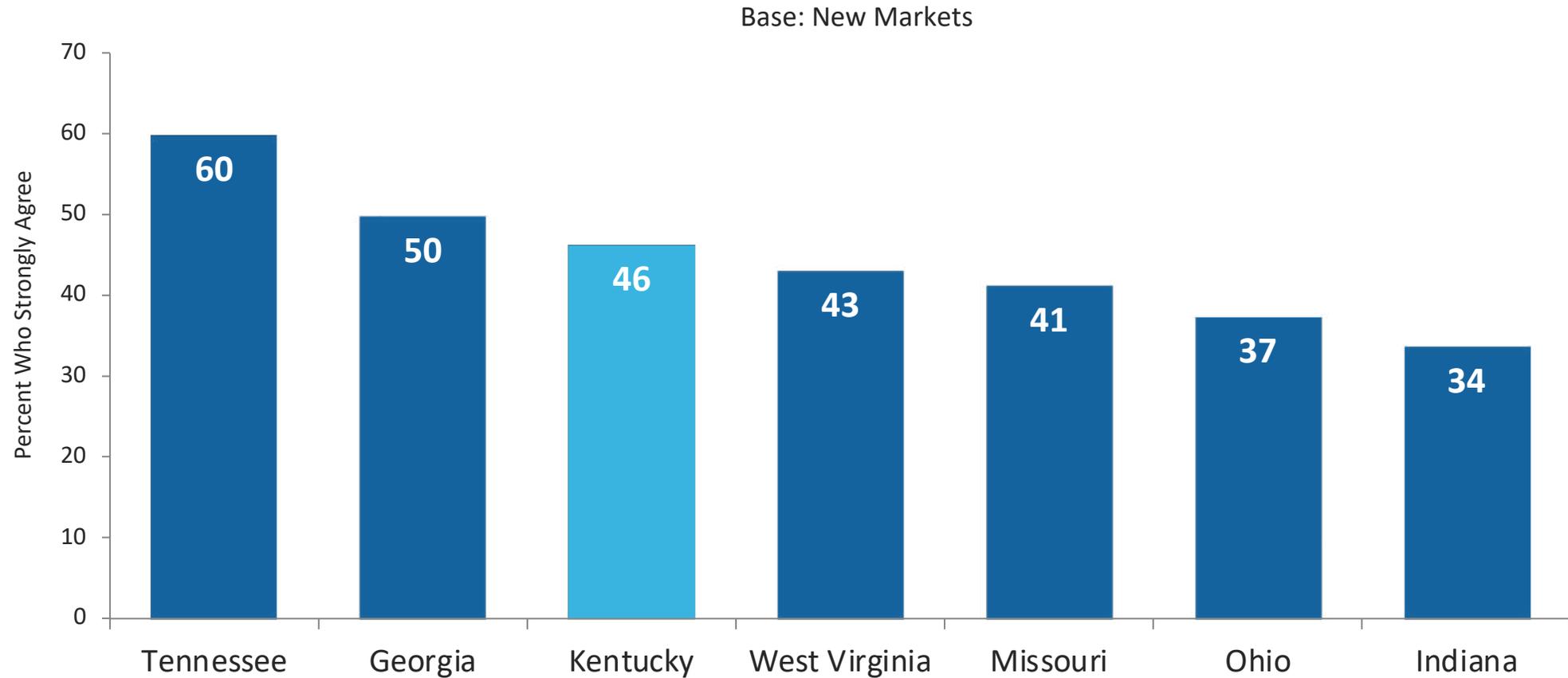
Longwoods
INTERNATIONAL

**Kentucky's Image
vs. Competition
- New Markets**

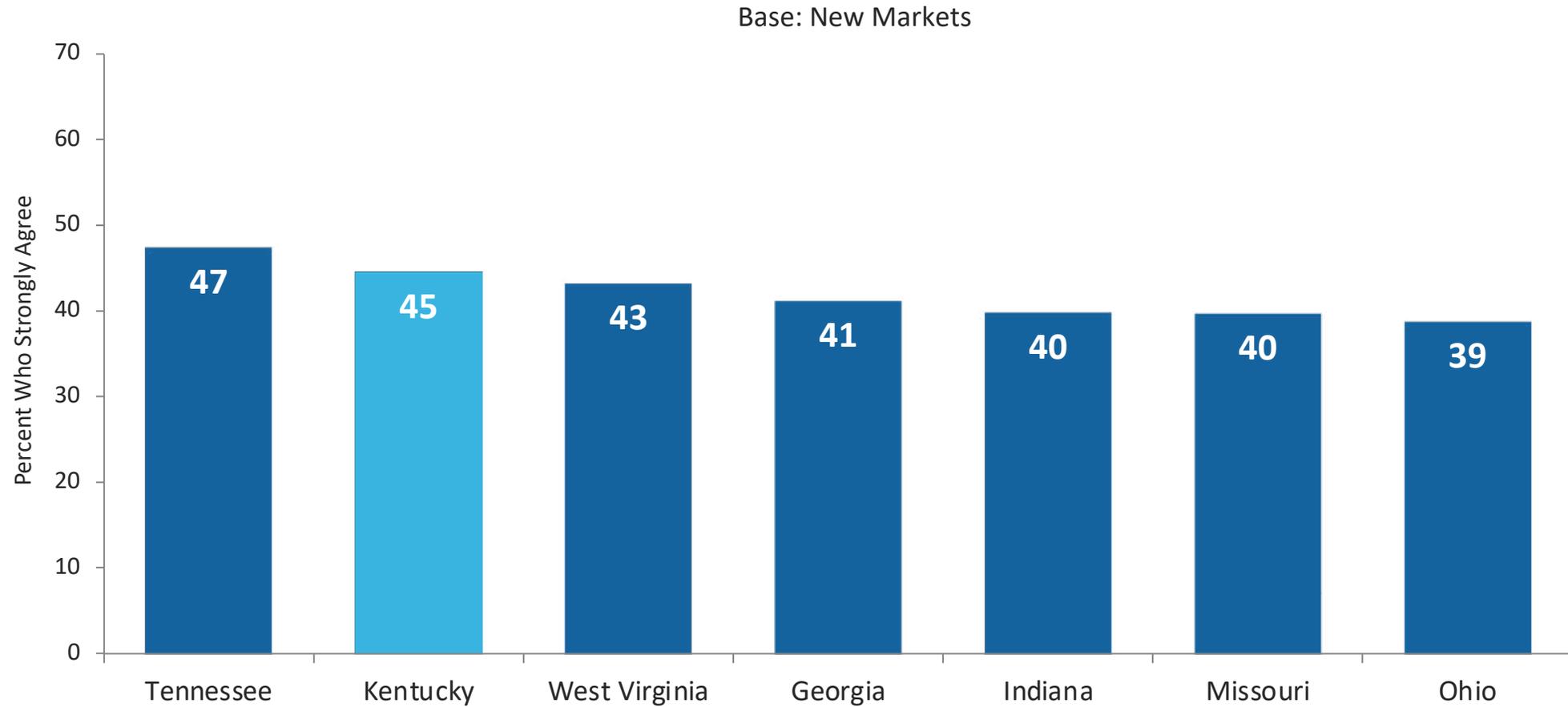
Kentucky's Image – New Markets

- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their new advertising markets:
 - Across the new markets survey, almost half (46%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
 - Ahead of West Virginia, Missouri, Ohio, and Indiana.
 - Behind Tennessee and Georgia.
- On the other overall image measure, perceptions as being “excellent value for money”, the rank ordering is different:
 - Kentucky (45%) is tied for first with Tennessee and within the margin of error of West Virginia.
 - Georgia, Indiana, Missouri, and Ohio trail.
- When comparing Kentucky's image versus the image of the combined competition, Kentucky's one image strength is truly beautiful scenery/setting
- The only weakness Kentucky had in comparison to the combined competitive set was for exciting nightlife/entertainment.

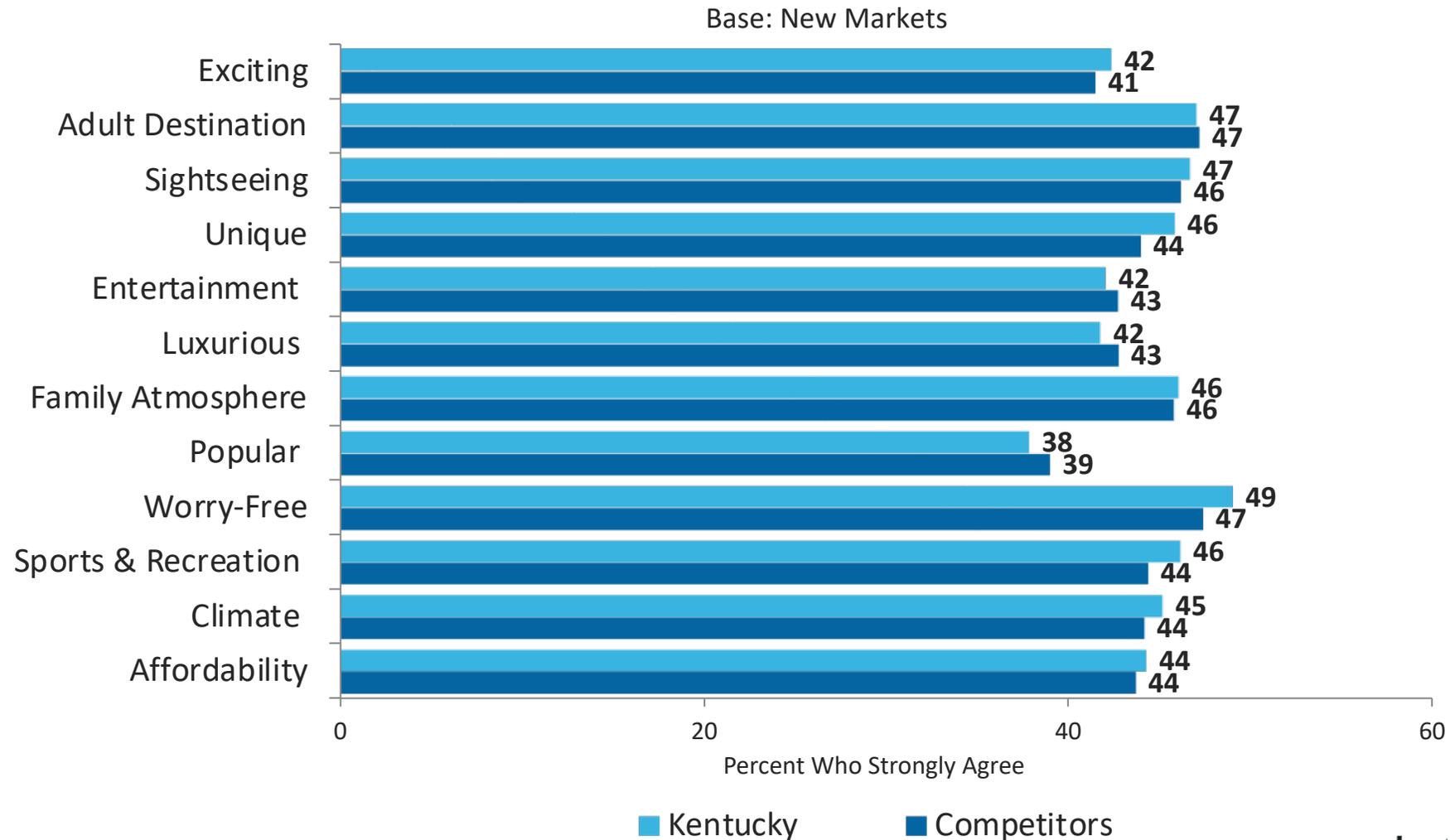
Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting” – New Markets



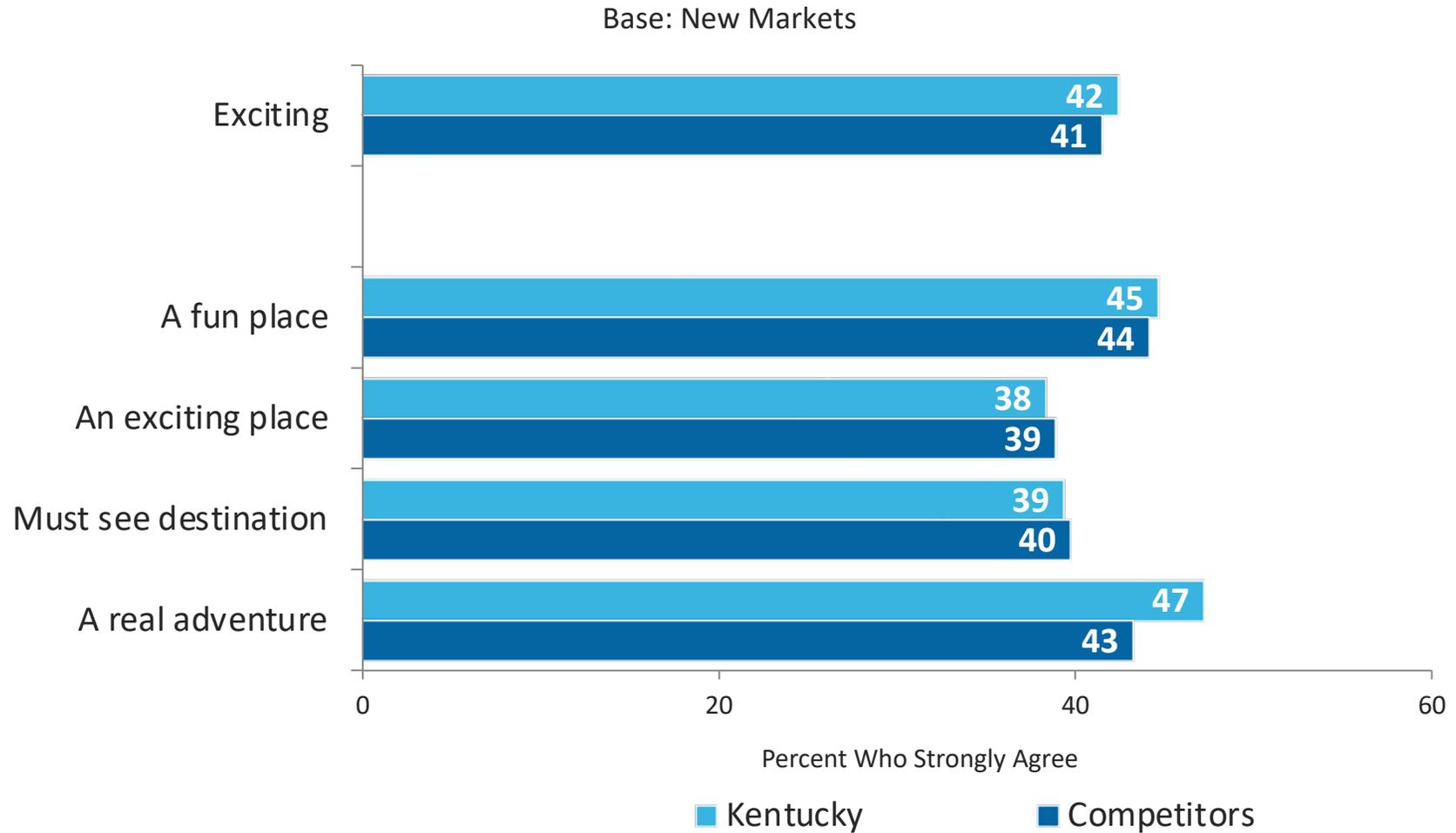
Kentucky Overall Image vs. Competition — “Excellent Value For the Money” – New Markets



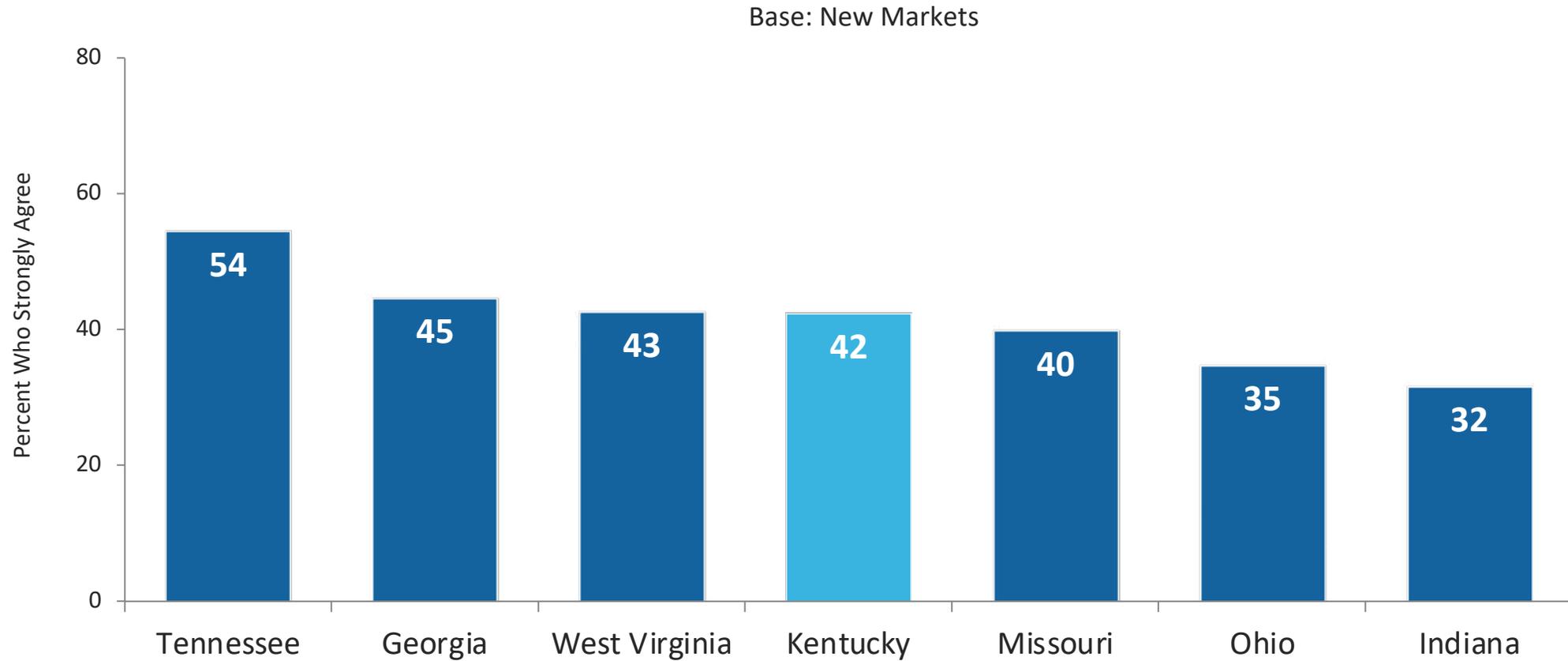
Kentucky's Overall Image vs. Competition – New Markets



Kentucky's Image vs. Competition — Exciting – New Markets

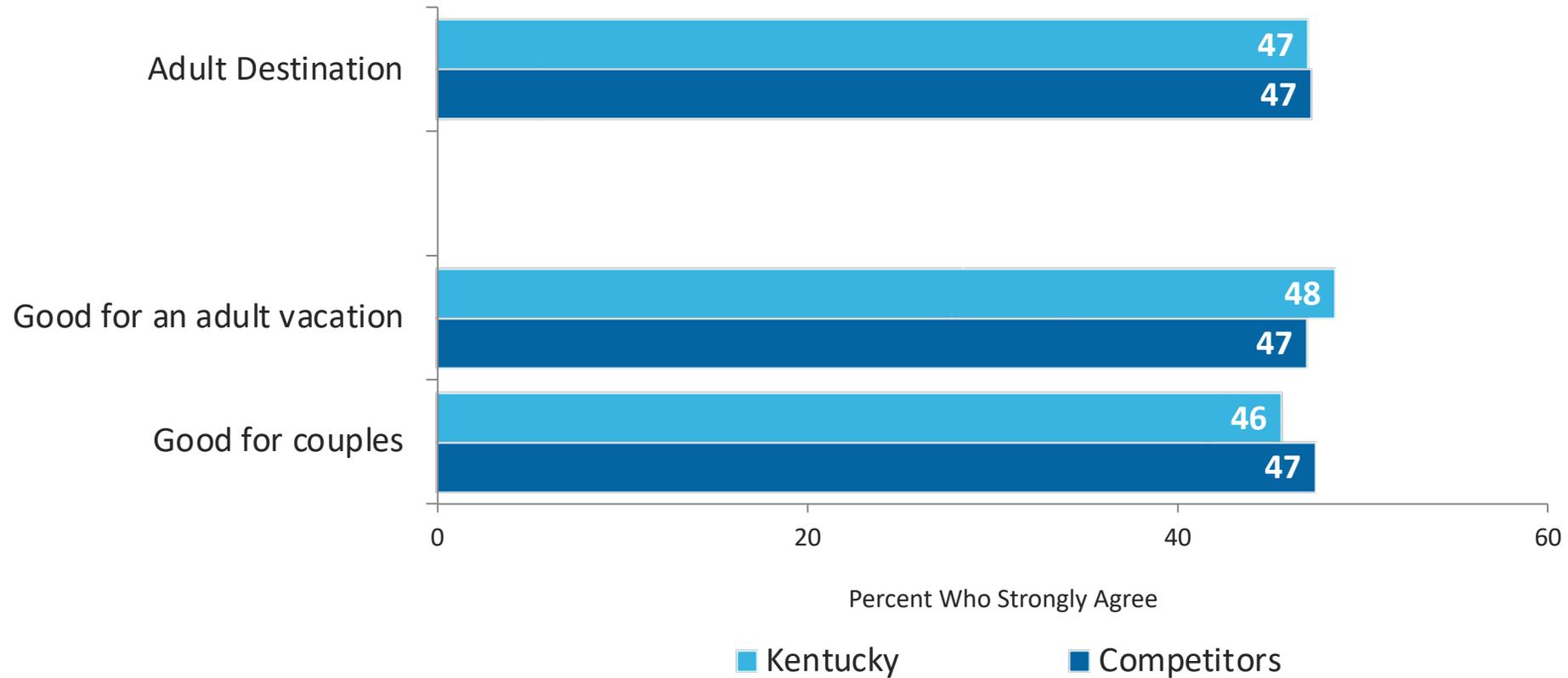


Kentucky's Image vs. Competition — Exciting – New Markets

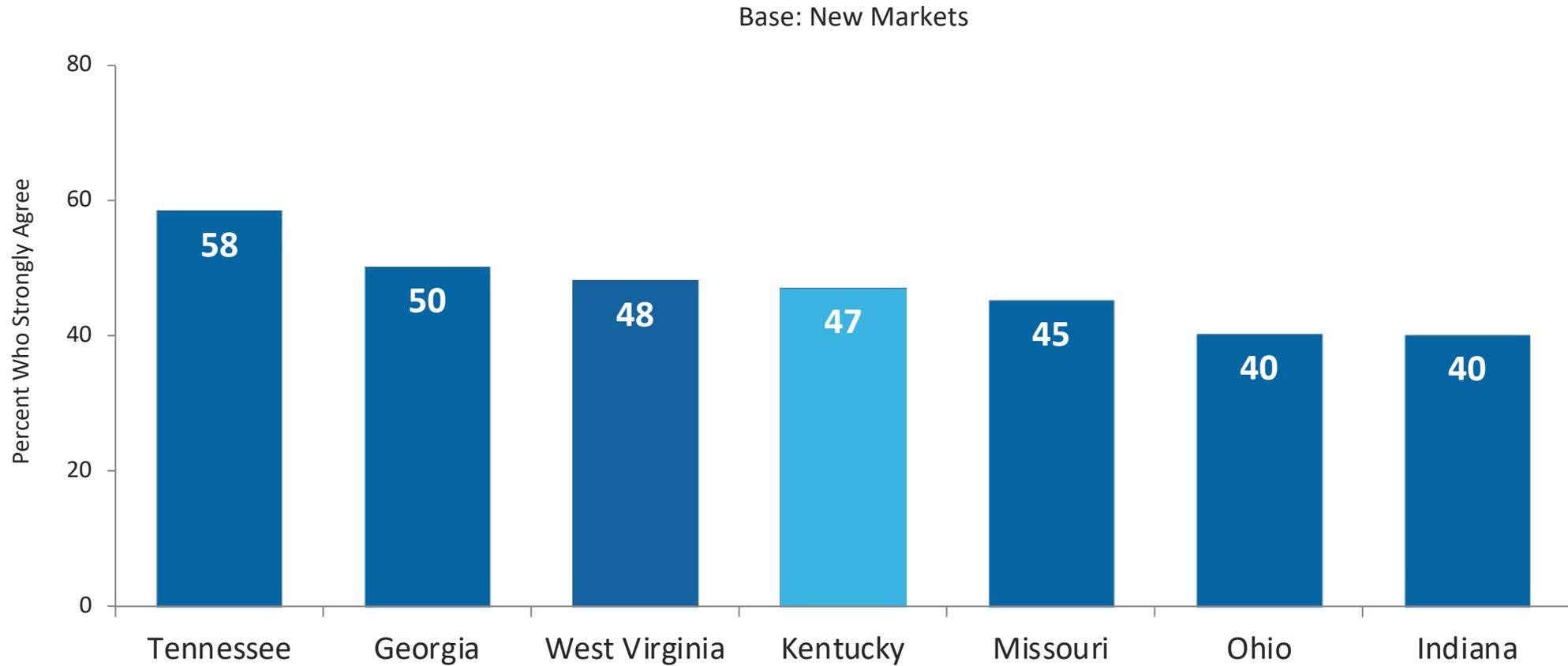


Kentucky's Image vs. Competition — Adult Destination – New Markets

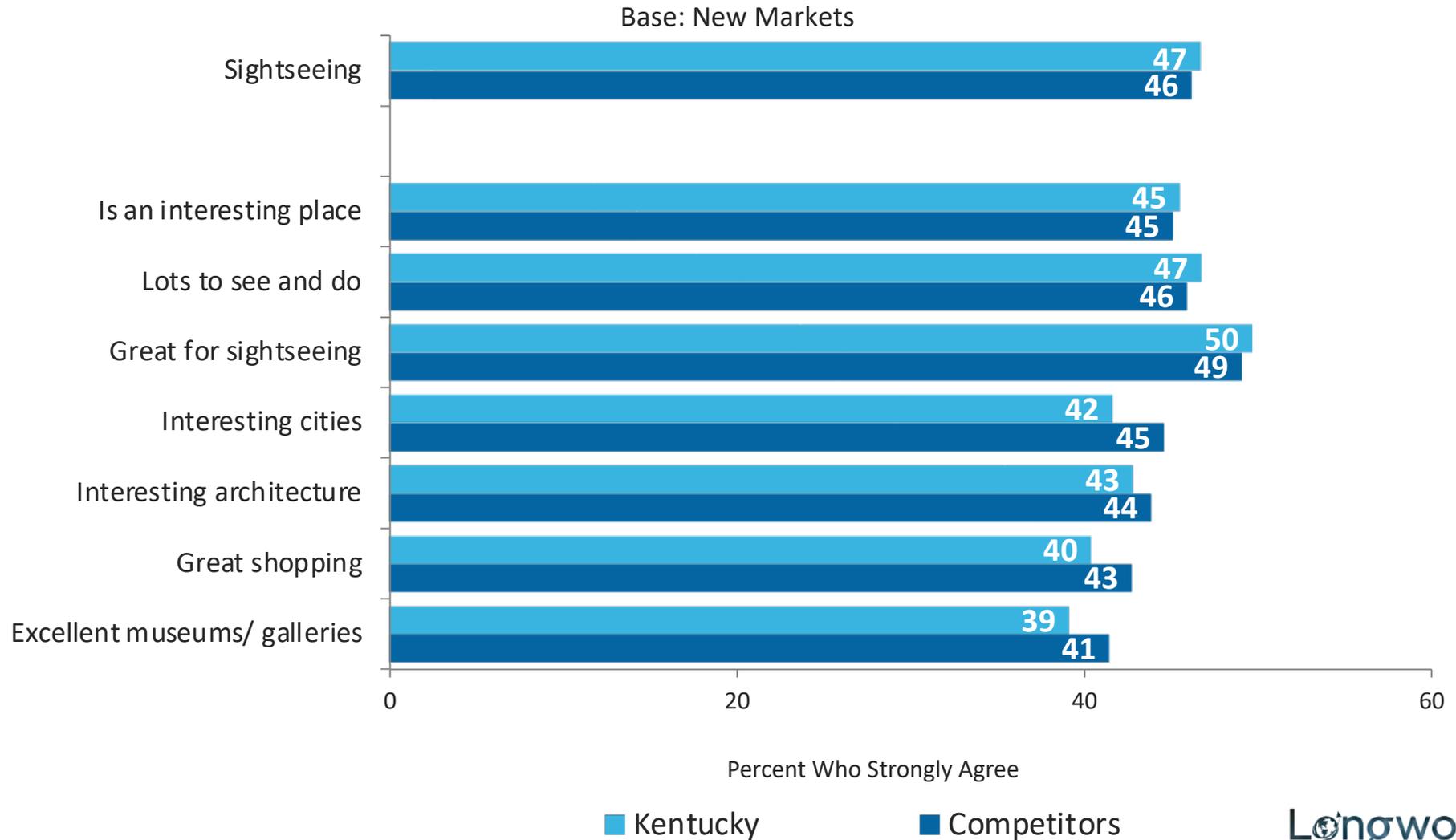
Base: New Markets



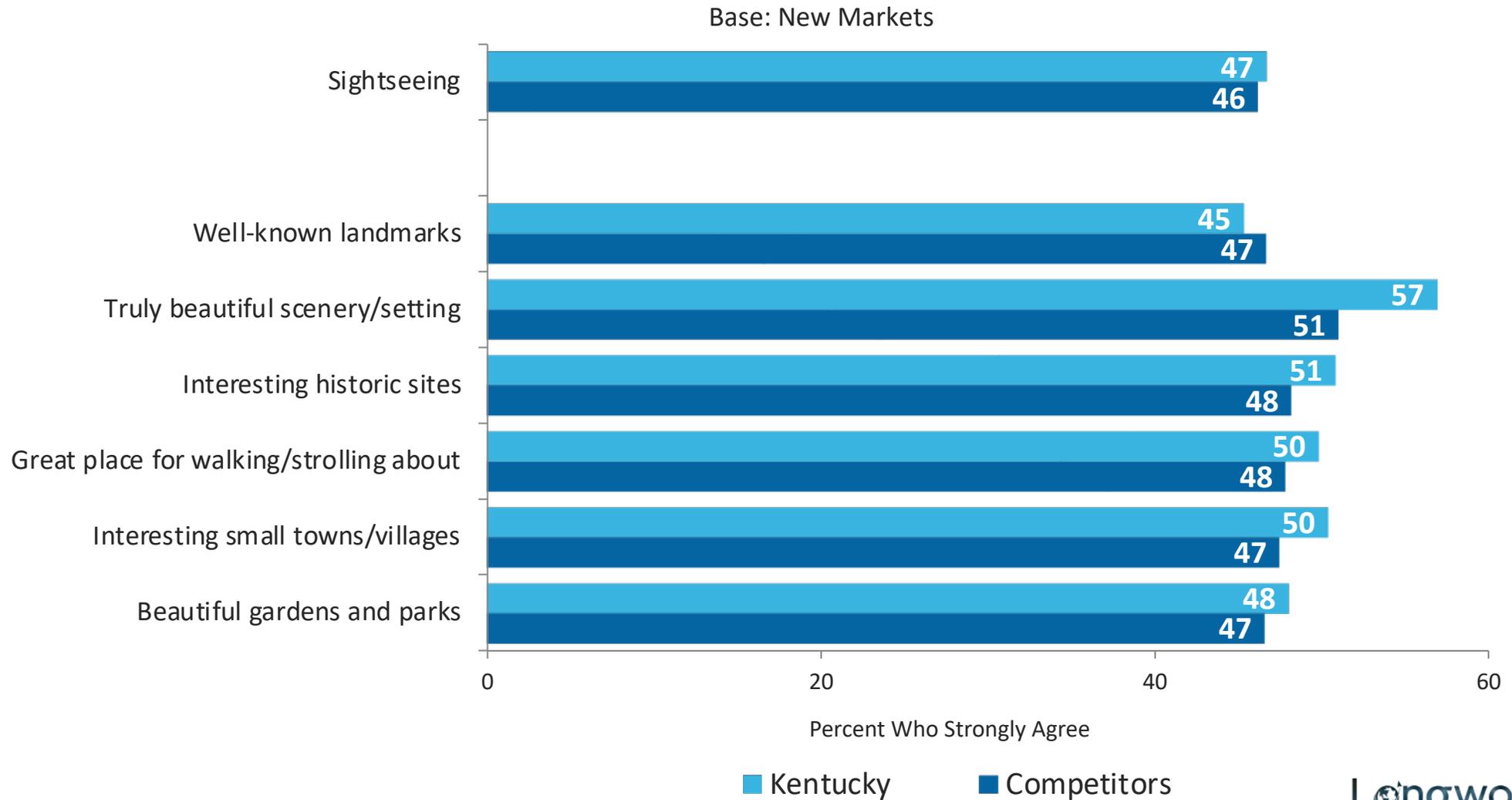
Kentucky's Image vs. Competition — Adult Destination – New Markets



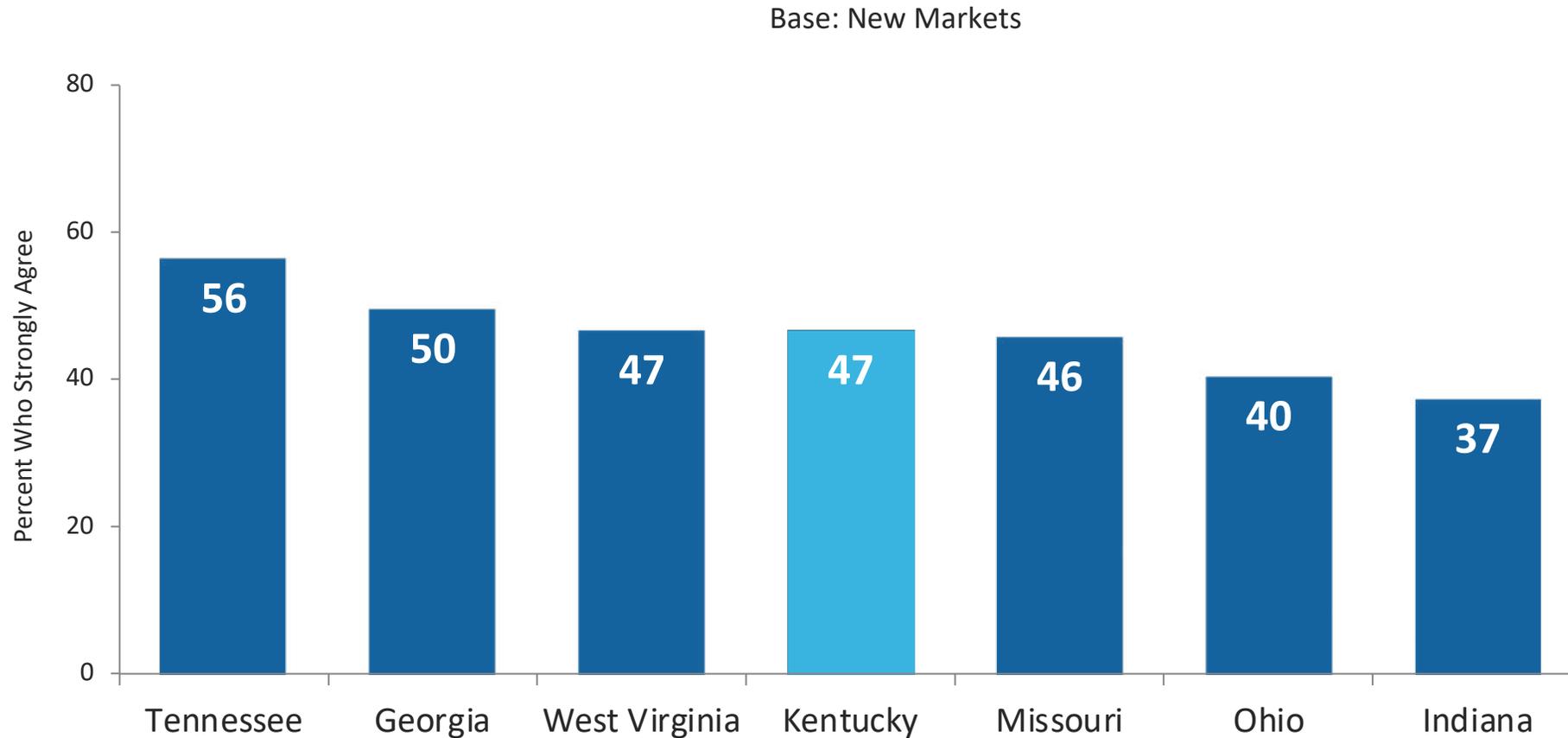
Kentucky's Image vs. Competition — Sightseeing – New Markets



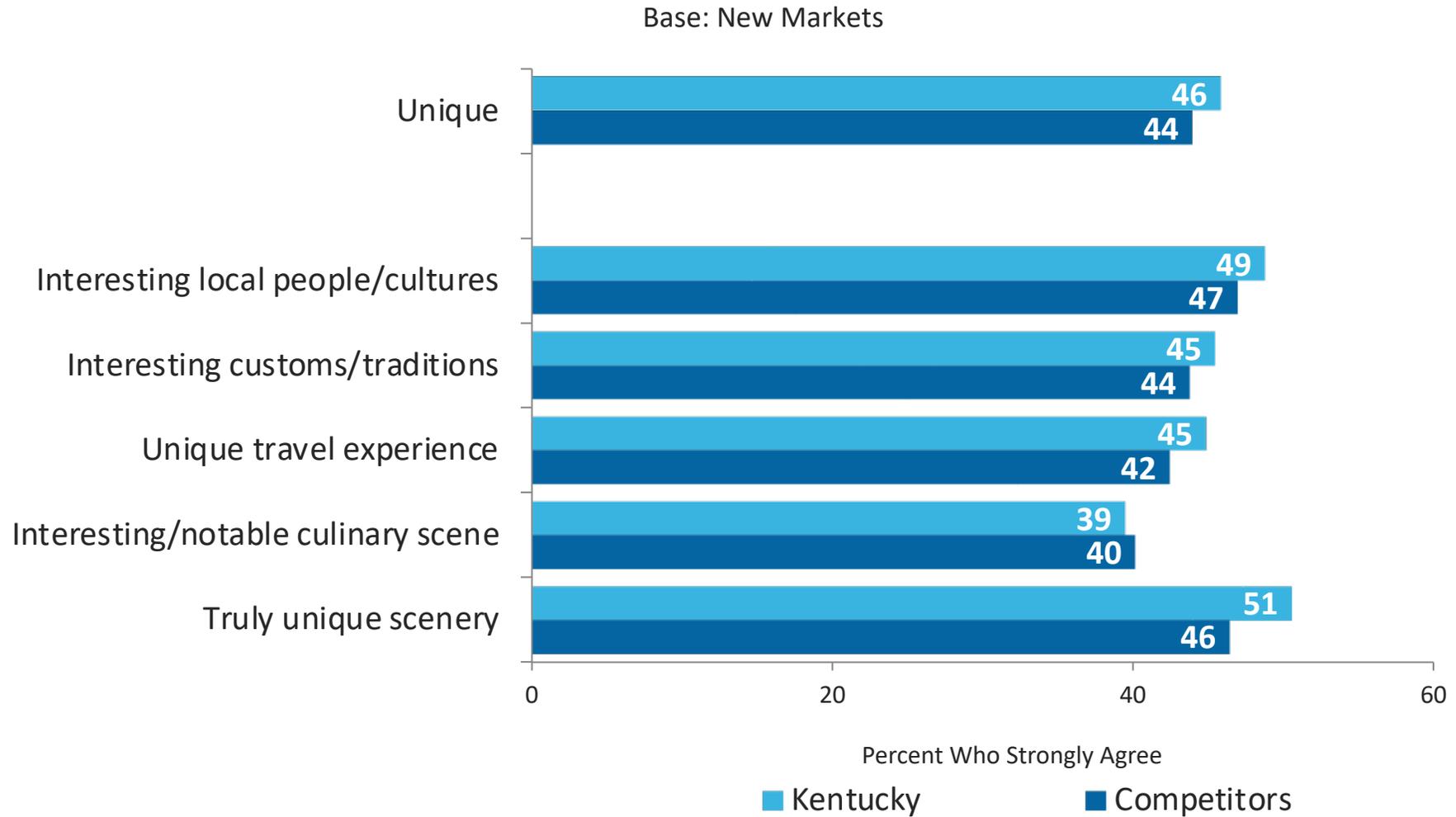
Kentucky's Image vs. Competition — Sightseeing – New Markets (Cont'd)



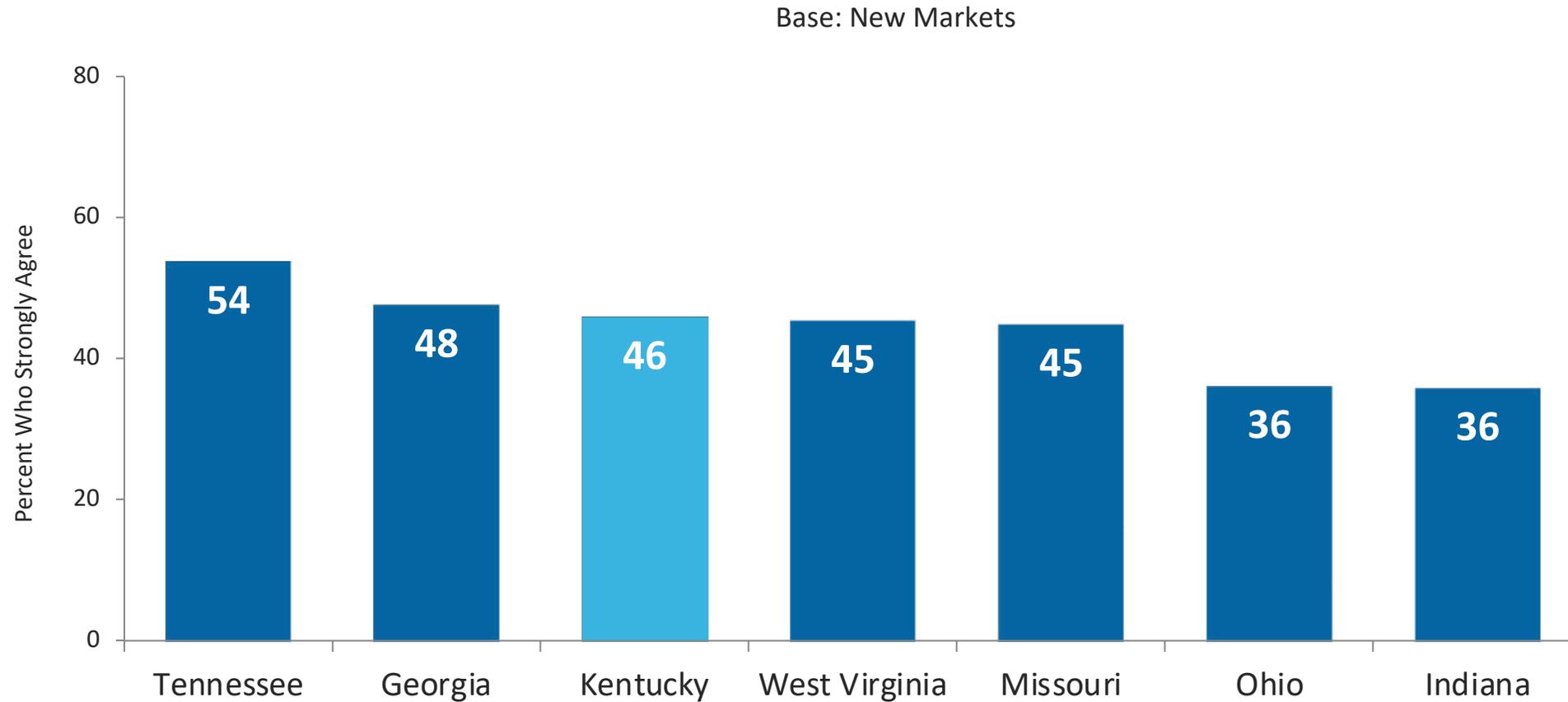
Kentucky's Image vs. Competition — Sightseeing – New Markets



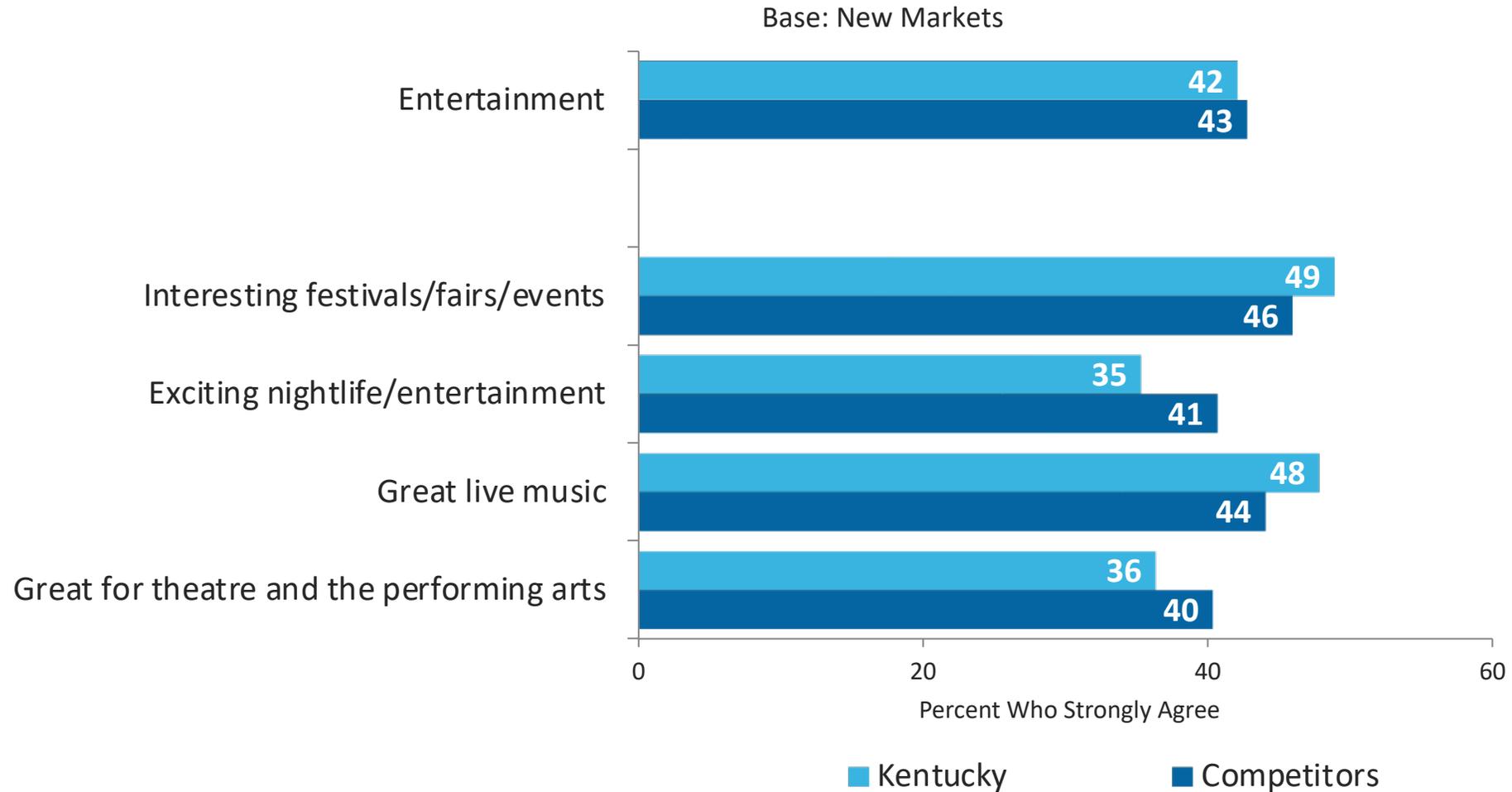
Kentucky's Image vs. Competition — Unique – New Markets



Kentucky's Image vs. Competition — Unique – New Markets

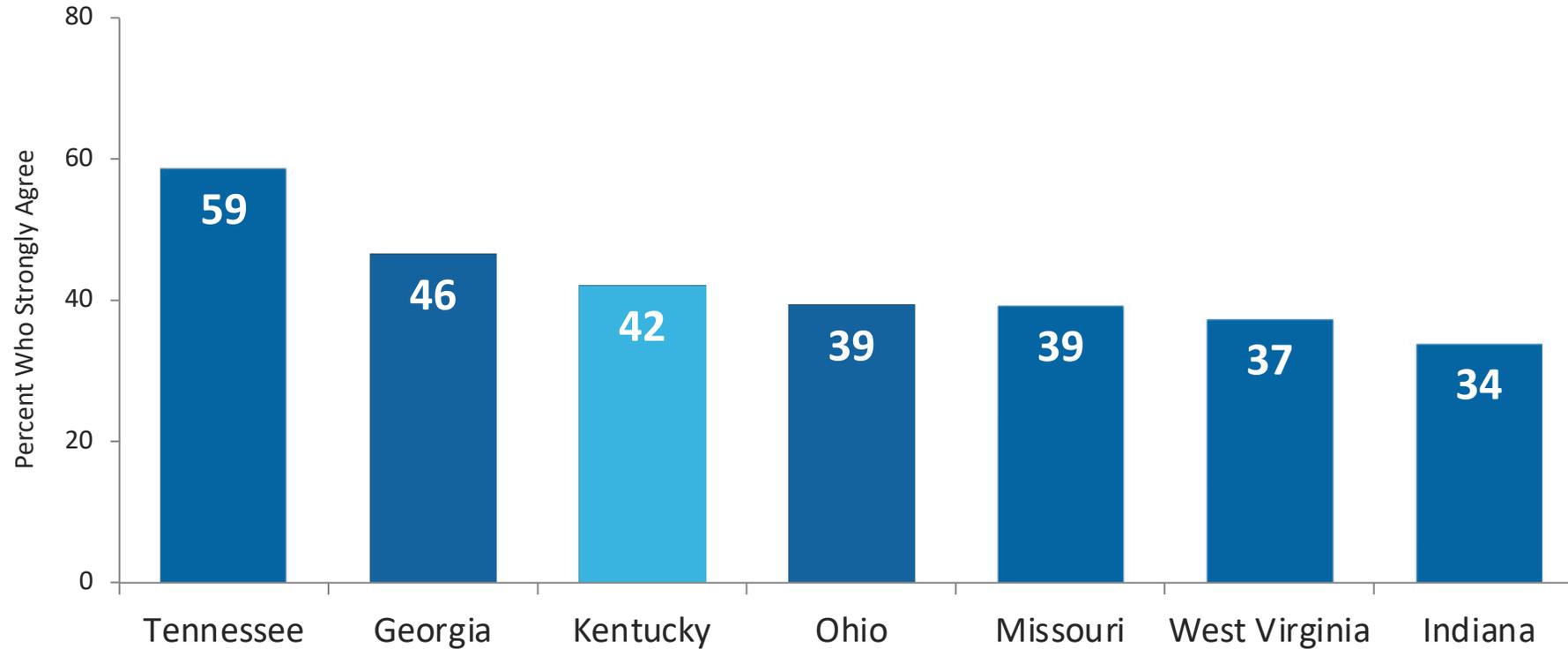


Kentucky's Image vs. Competition — Entertainment – New Markets

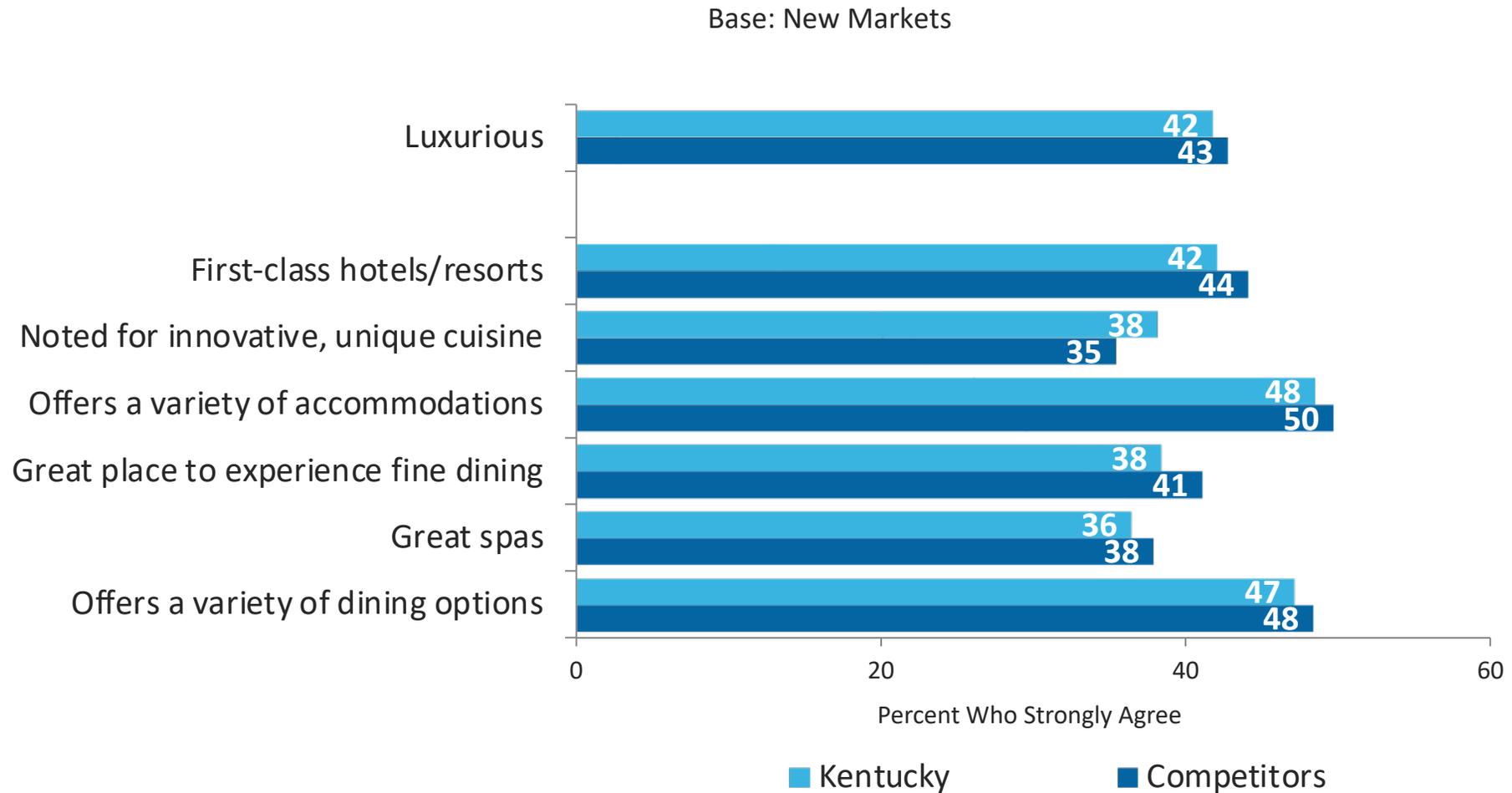


Kentucky's Image vs. Competition — Entertainment — New Markets

Base: New Markets

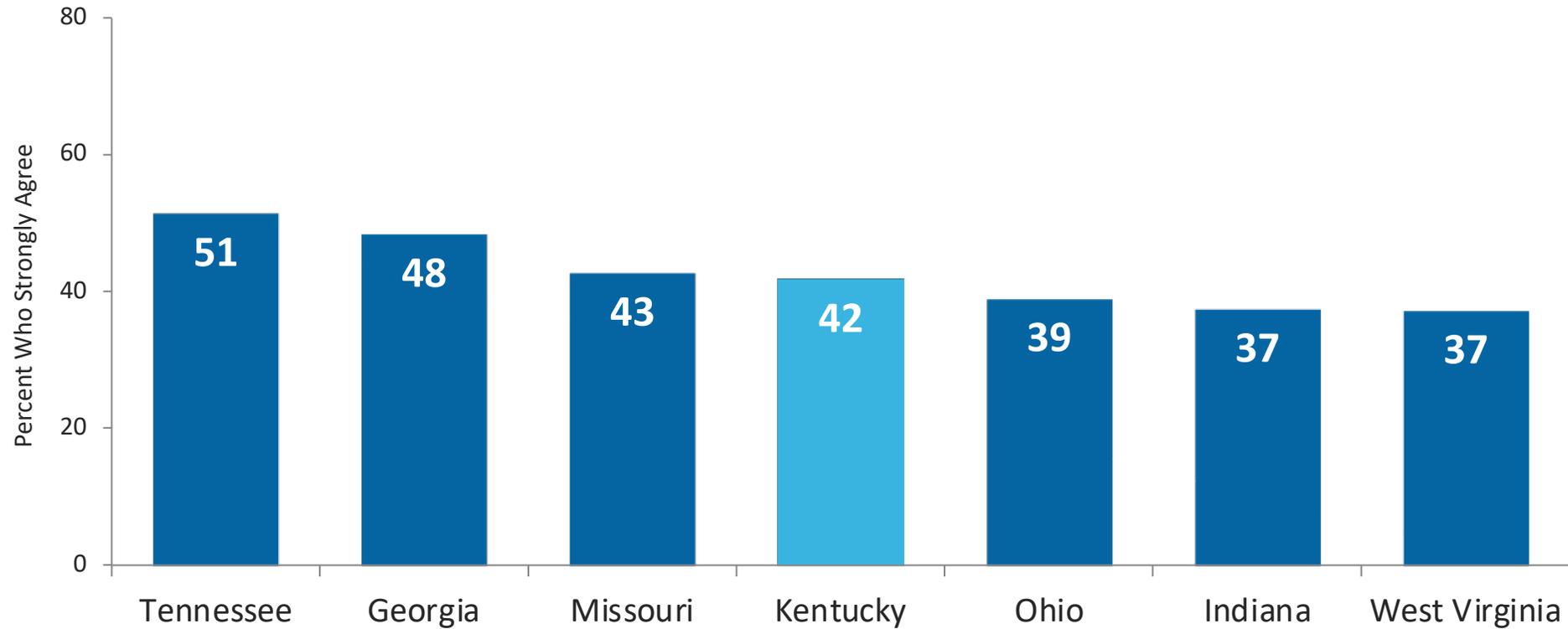


Kentucky's Image vs. Competition — Luxurious – New Markets

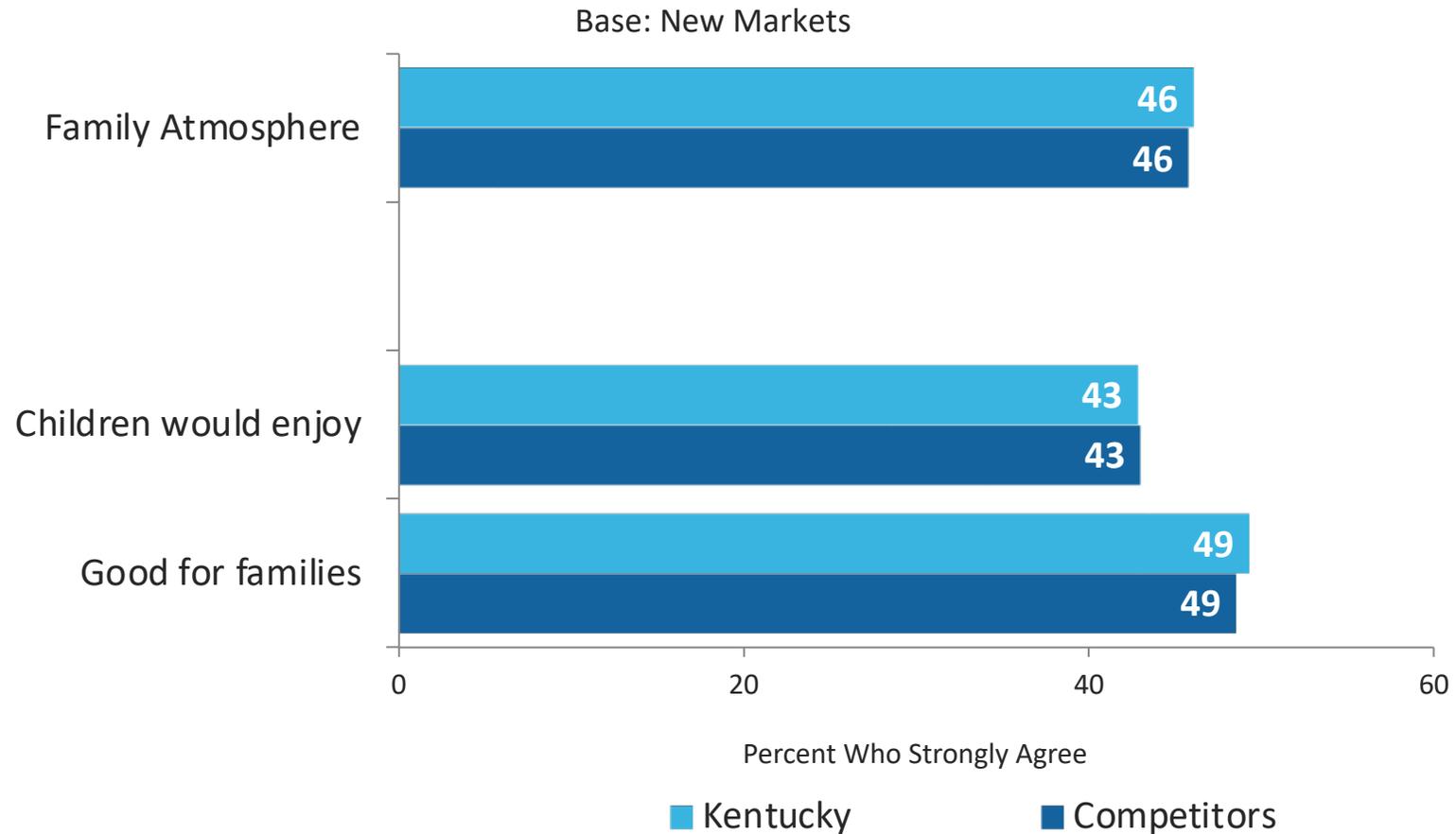


Kentucky's Image vs. Competition — Luxurious — New Markets

Base: New Markets

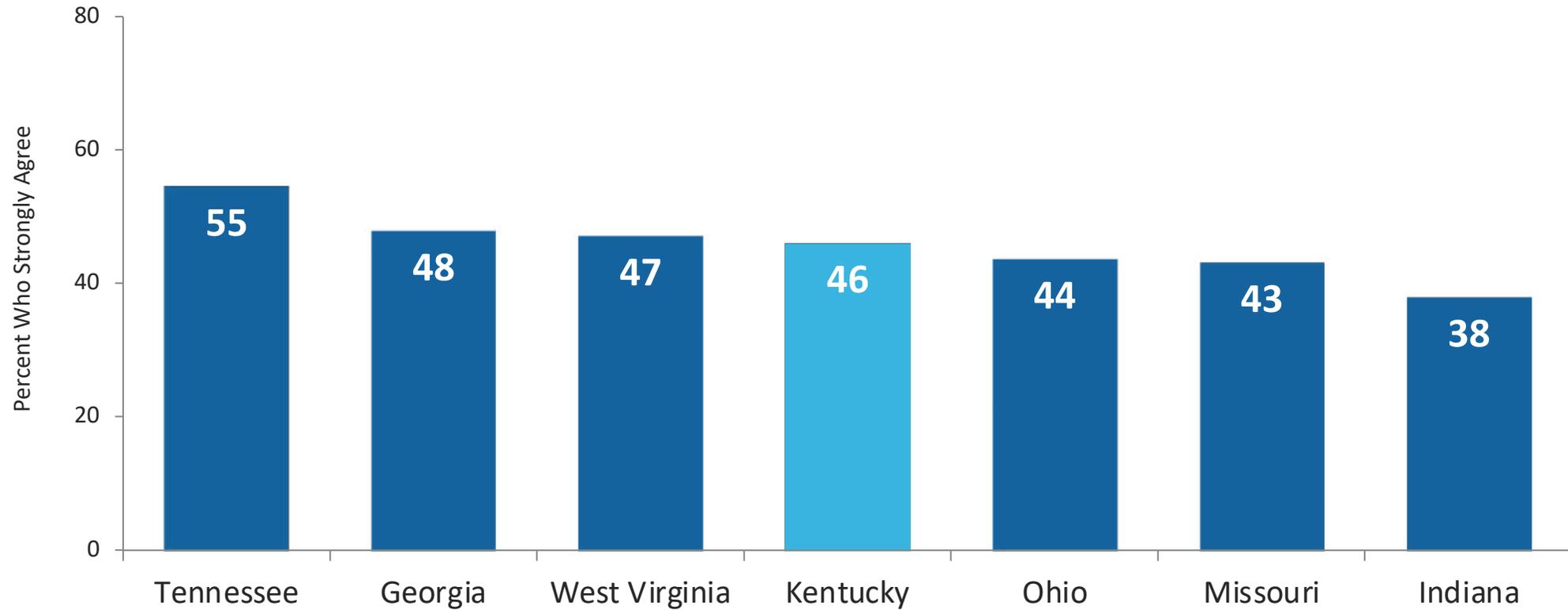


Kentucky's Image vs. Competition — Family Atmosphere – New Markets

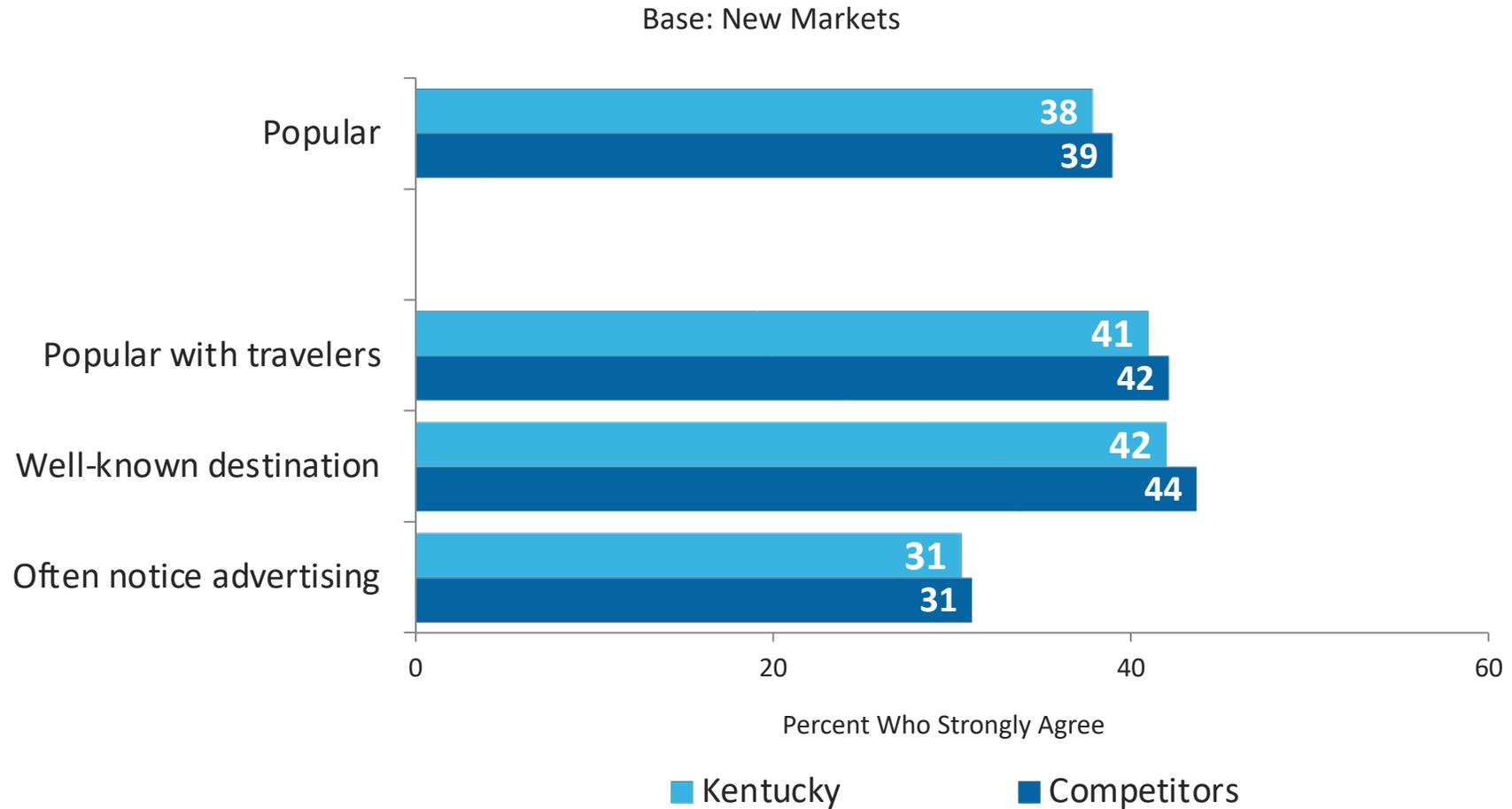


Kentucky's Image vs. Competition — Family Atmosphere – New Markets

Base: New Markets

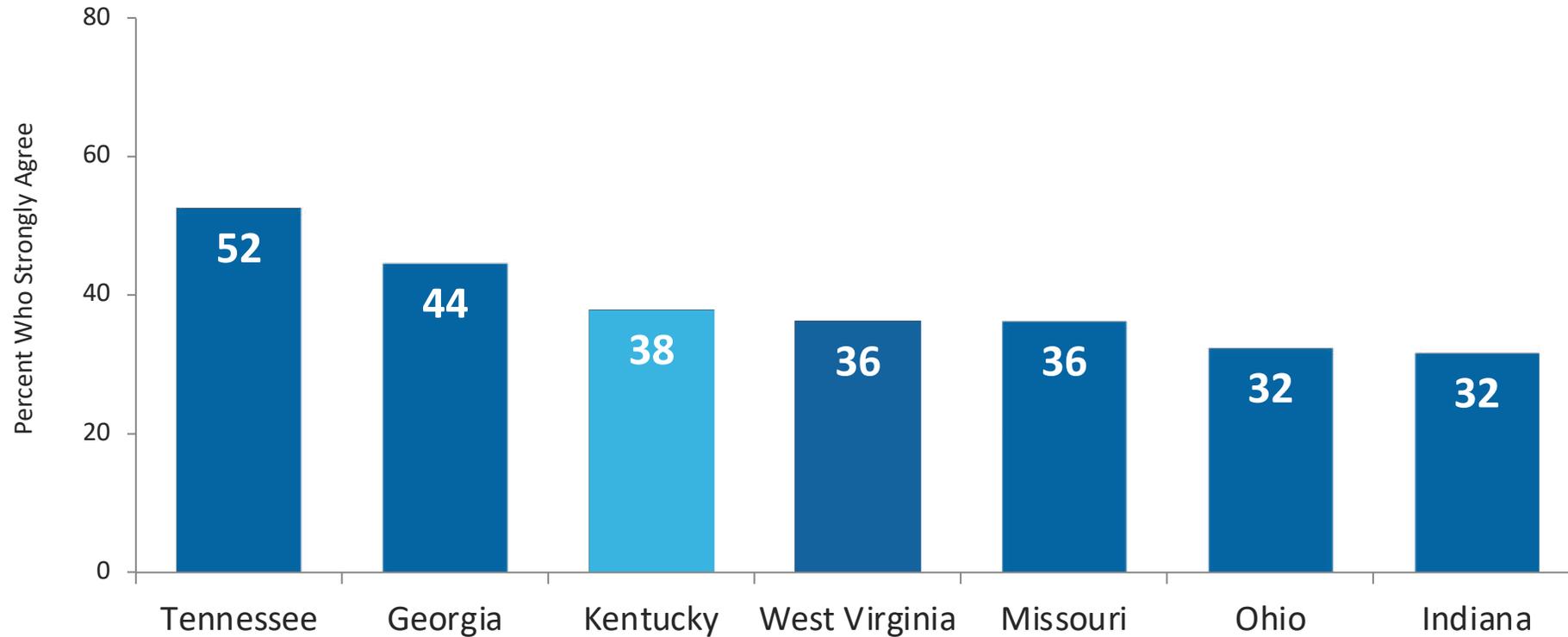


Kentucky's Image vs. Competition — Popular – New Markets

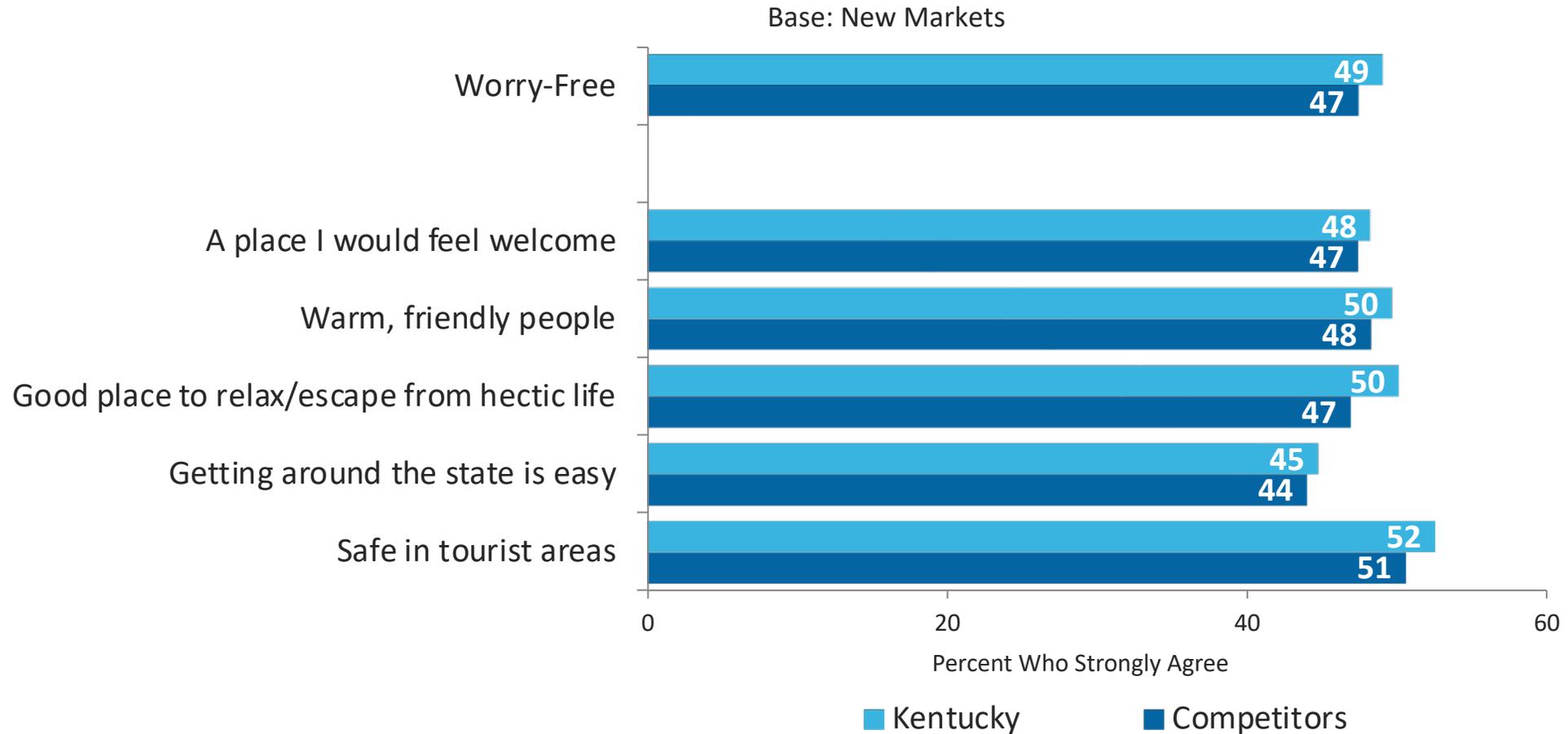


Kentucky's Image vs. Competition — Popular — New Markets

Base: New Markets

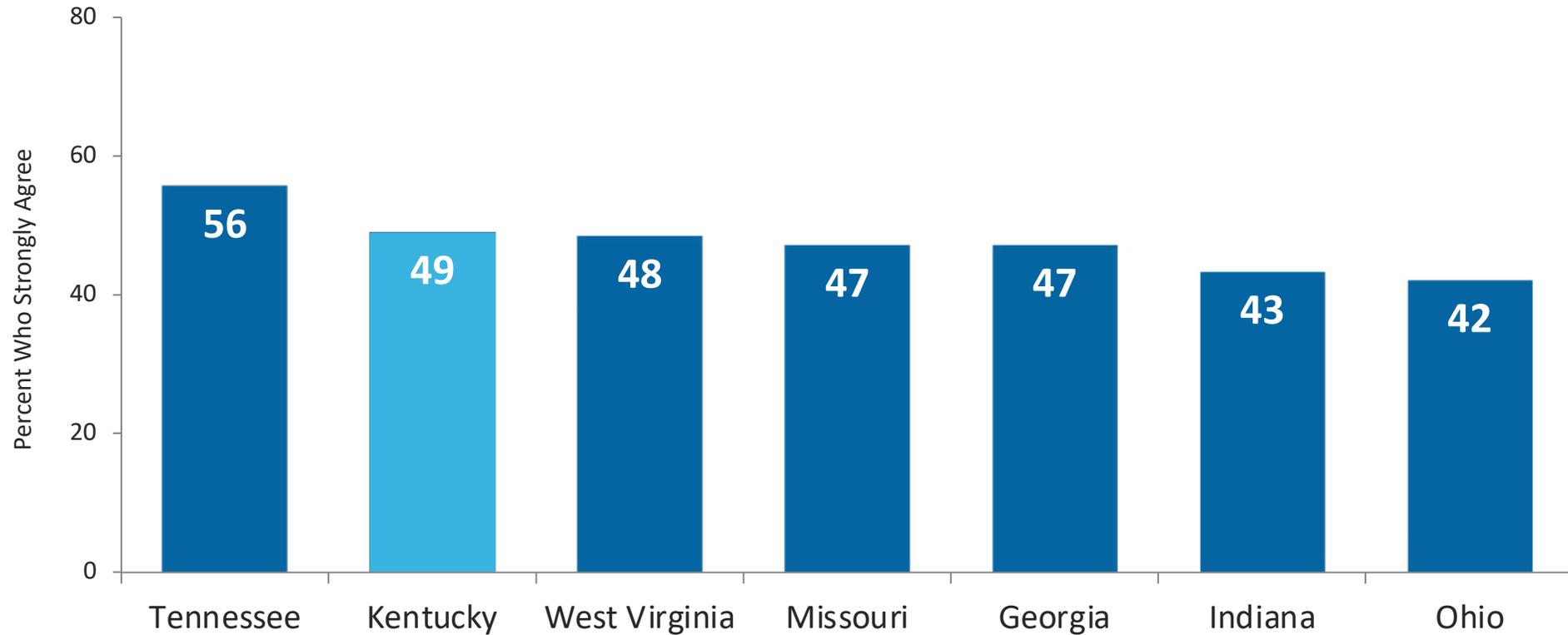


Kentucky's Image vs. Competition — Worry-Free – New Markets

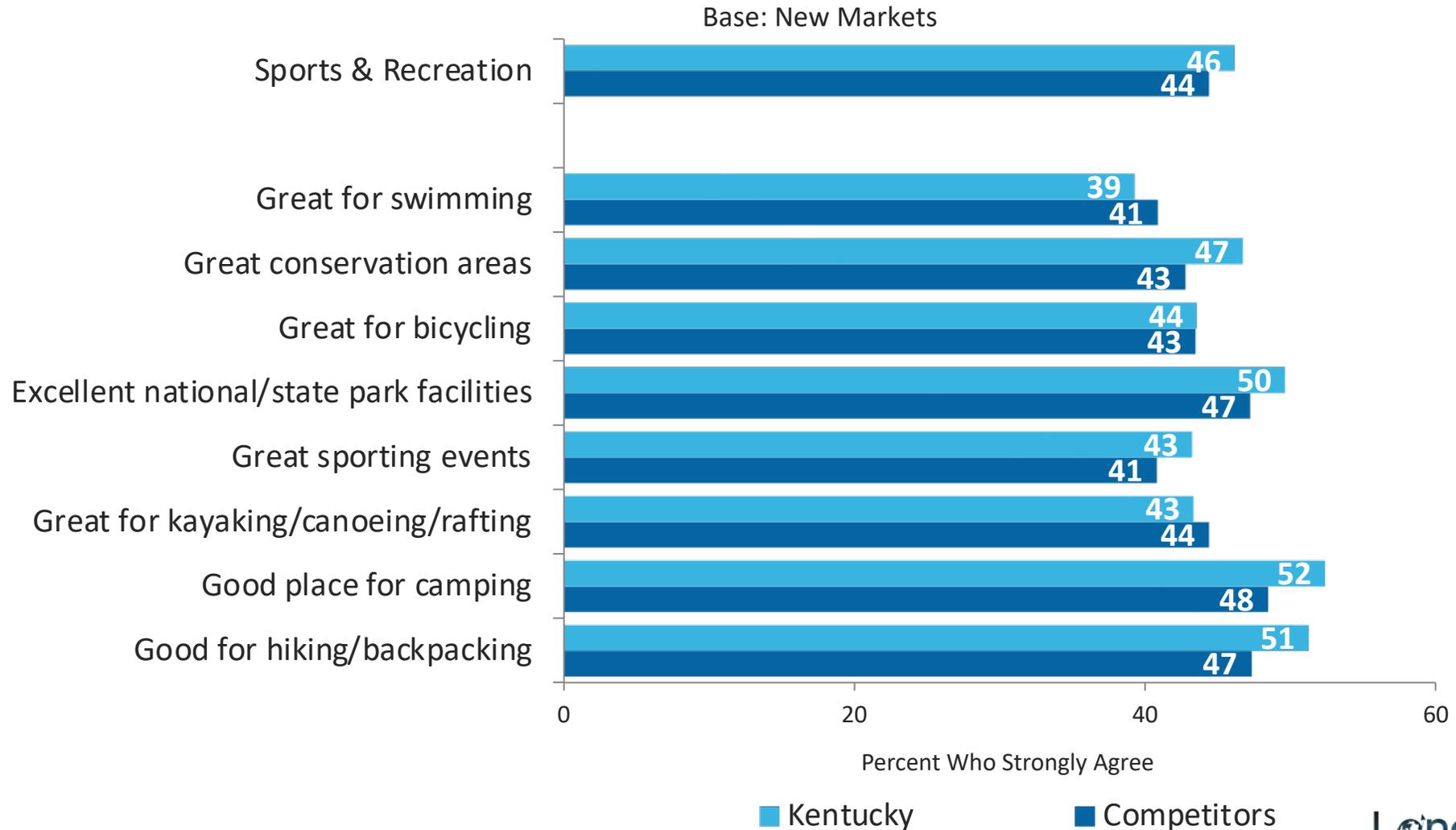


Kentucky's Image vs. Competition — Worry-Free – New Markets

Base: New Markets

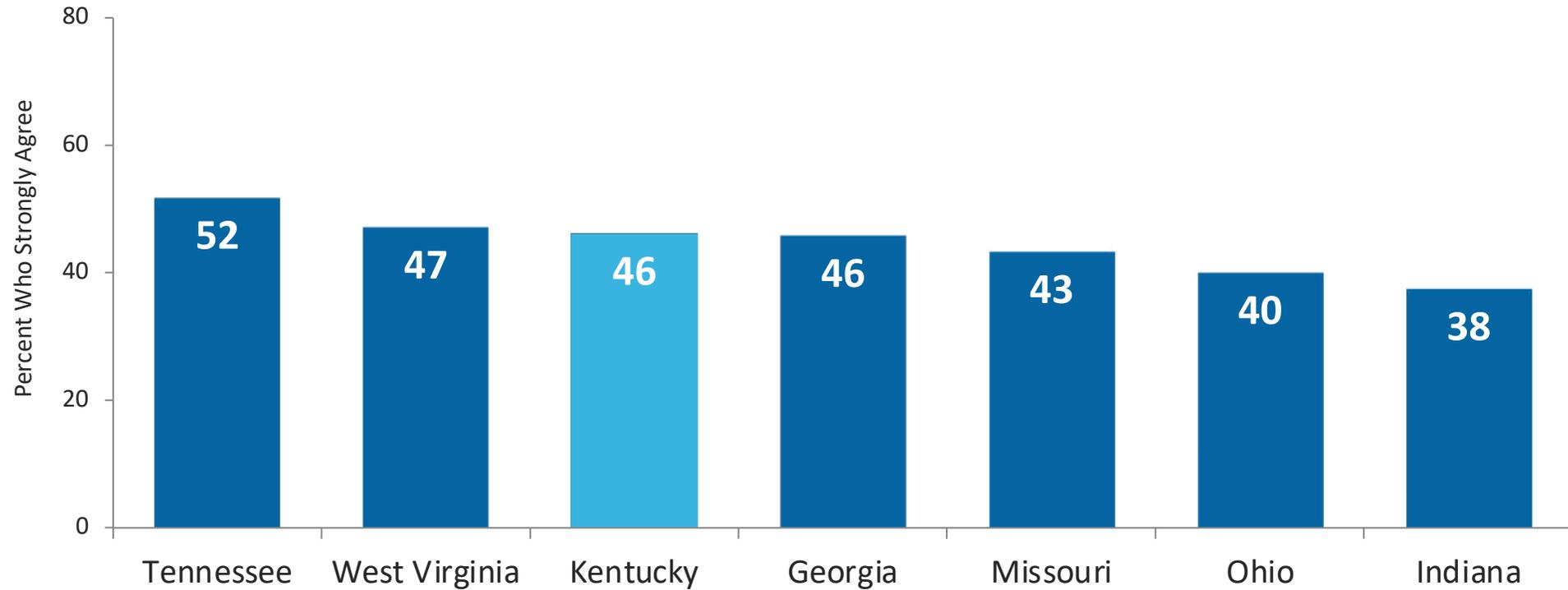


Kentucky's Image vs. Competition — Sports & Recreation – New Markets

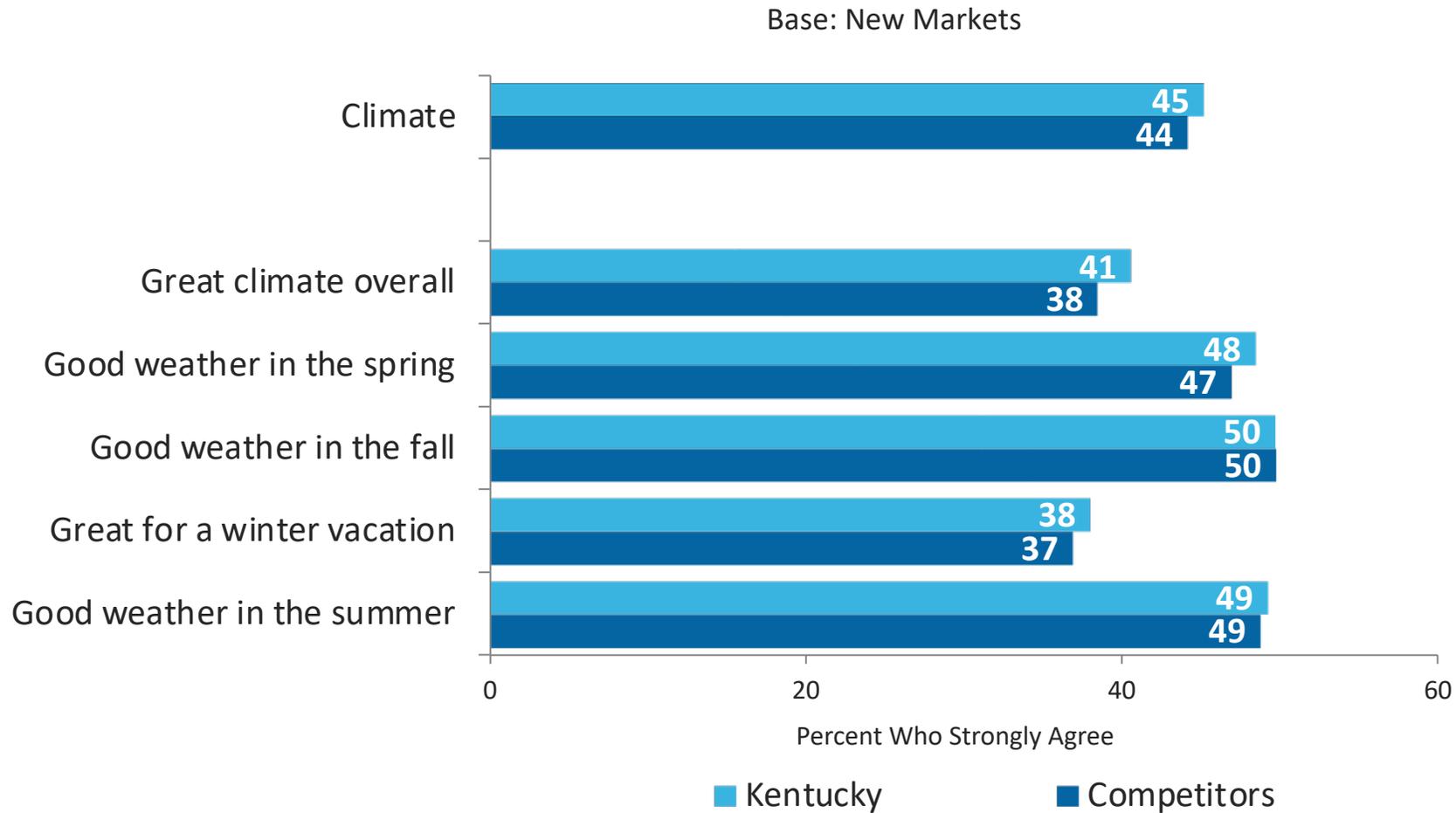


Kentucky's Image vs. Competition — Sports & Recreation – New Markets

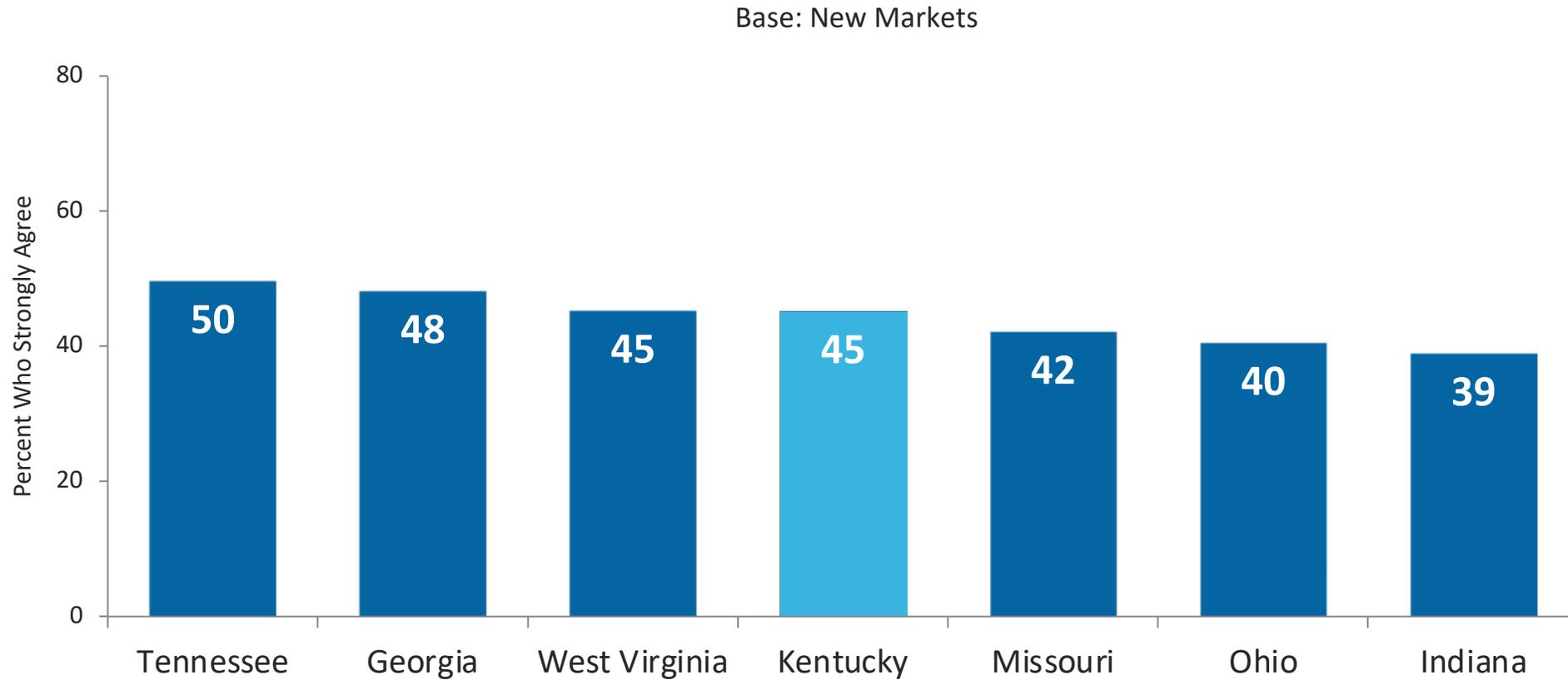
Base: New Markets



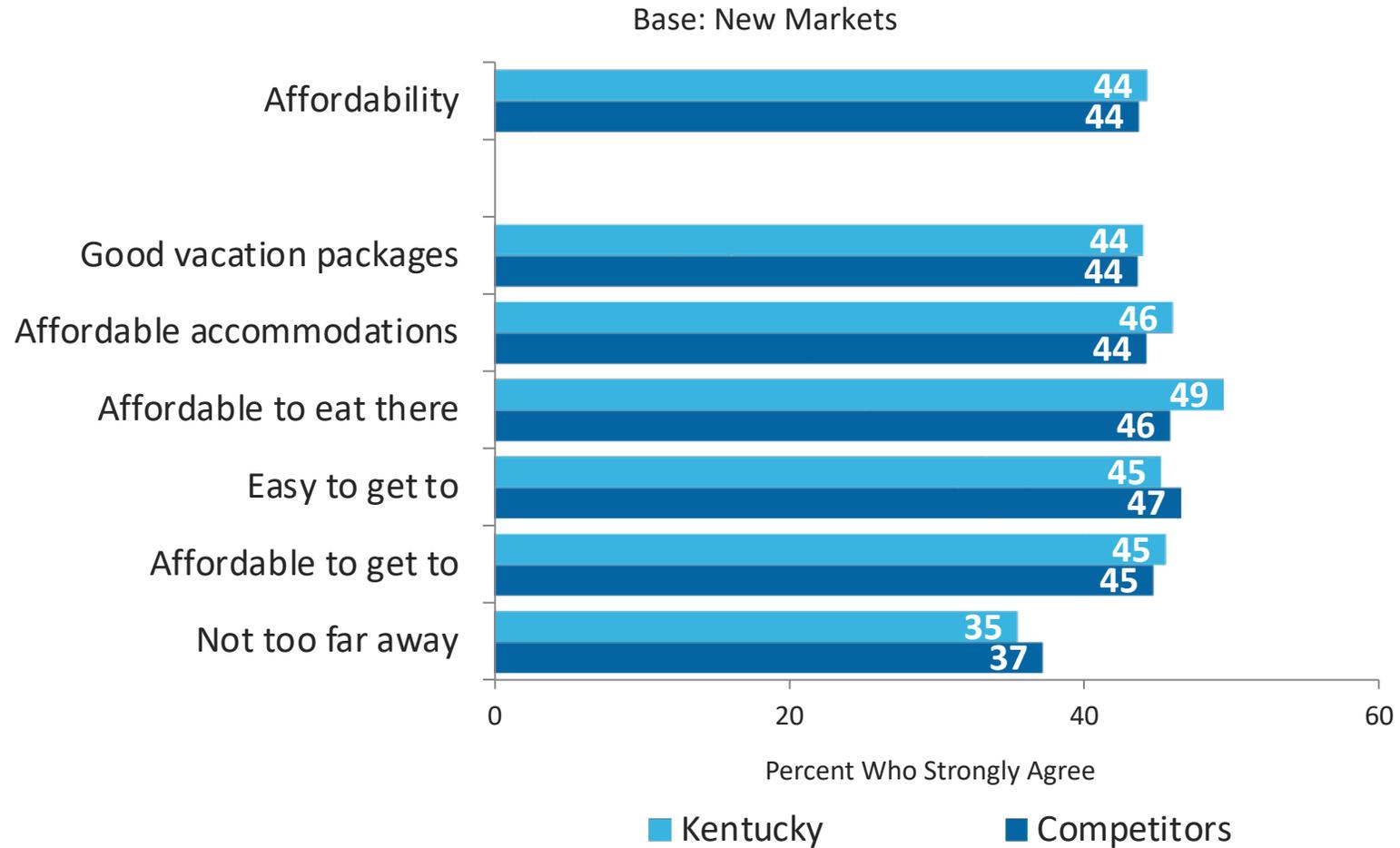
Kentucky's Image vs. Competition — Climate – New Markets



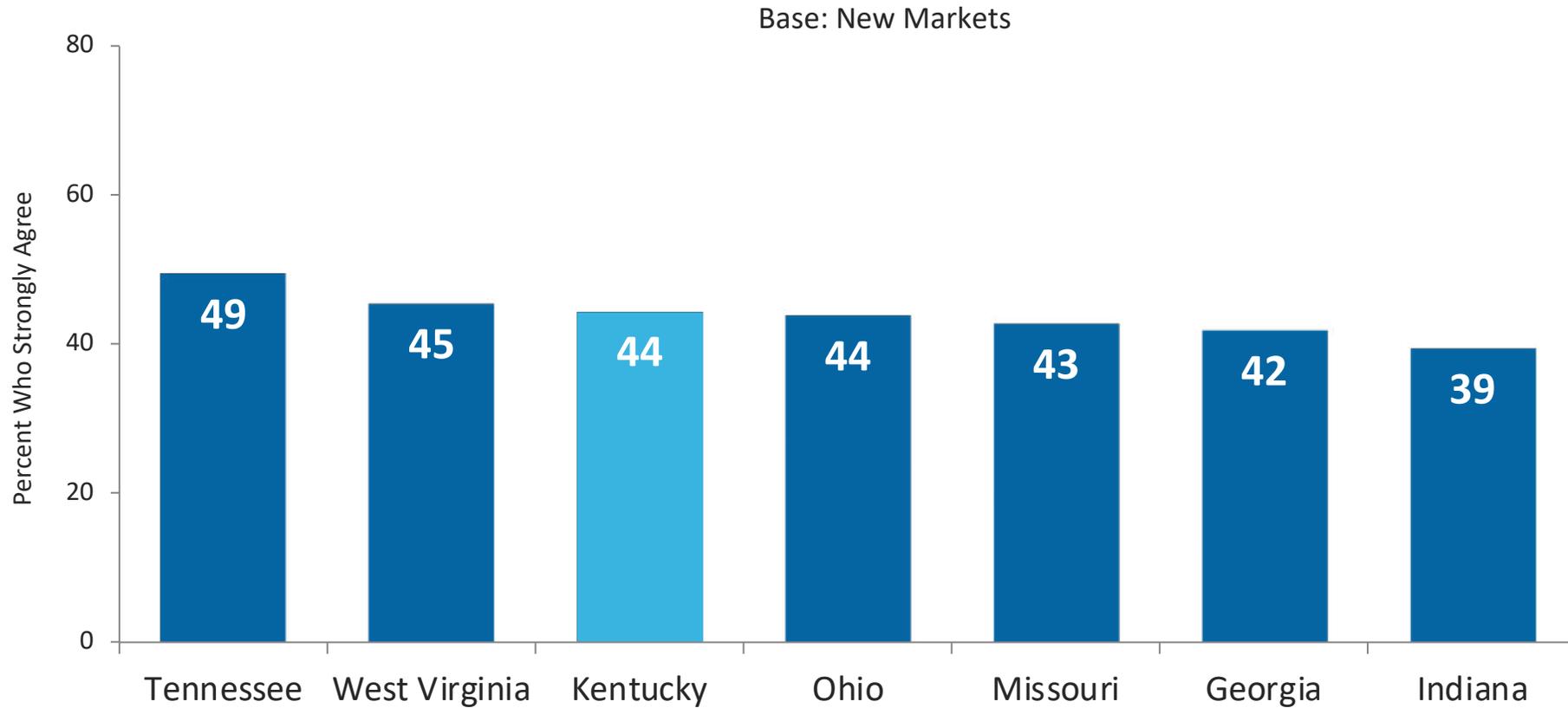
Kentucky's Image vs. Competition — Climate – New Markets



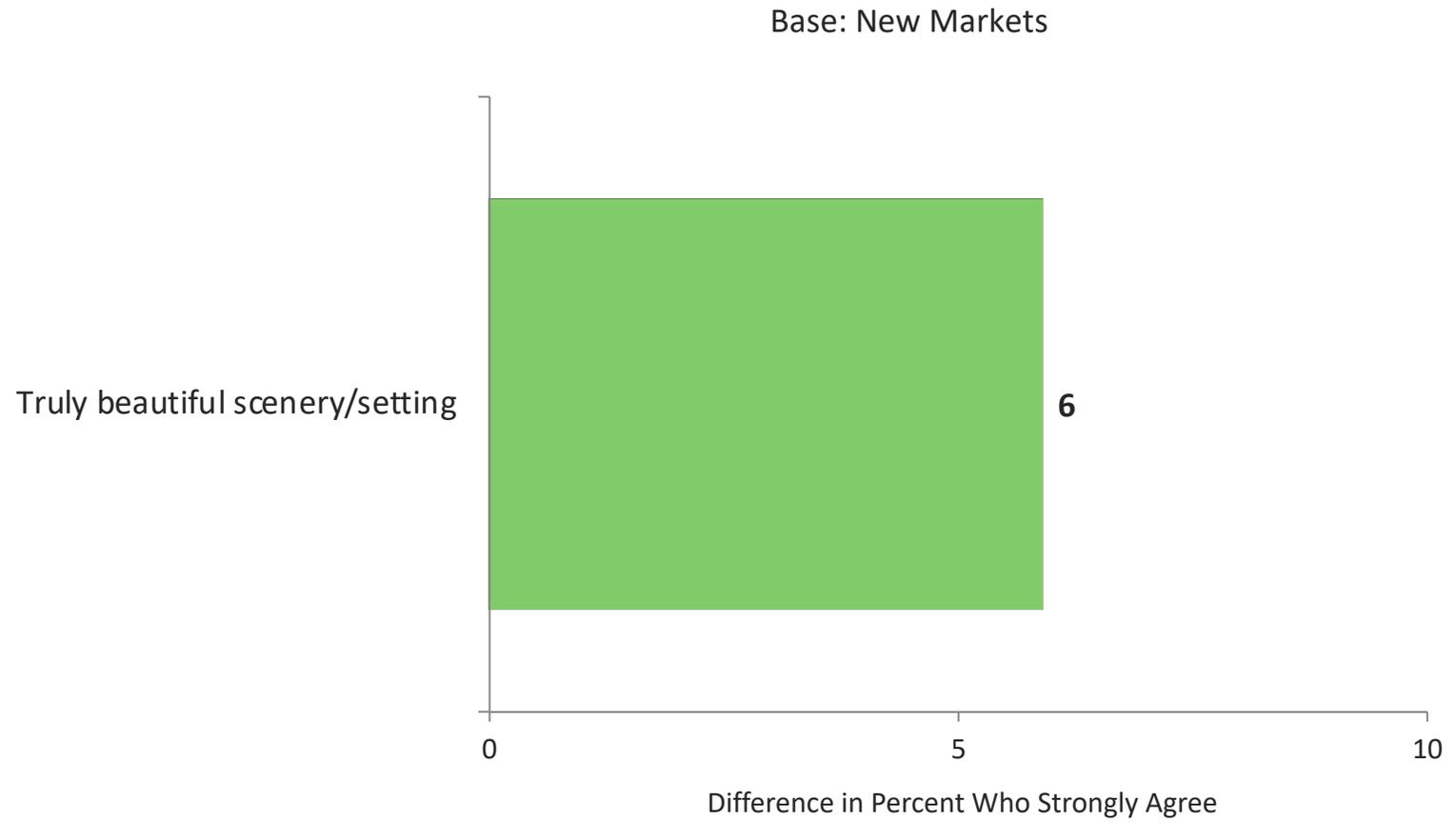
Kentucky's Image vs. Competition — Affordability – New Markets



Kentucky's Image vs. Competition — Affordability – New Markets

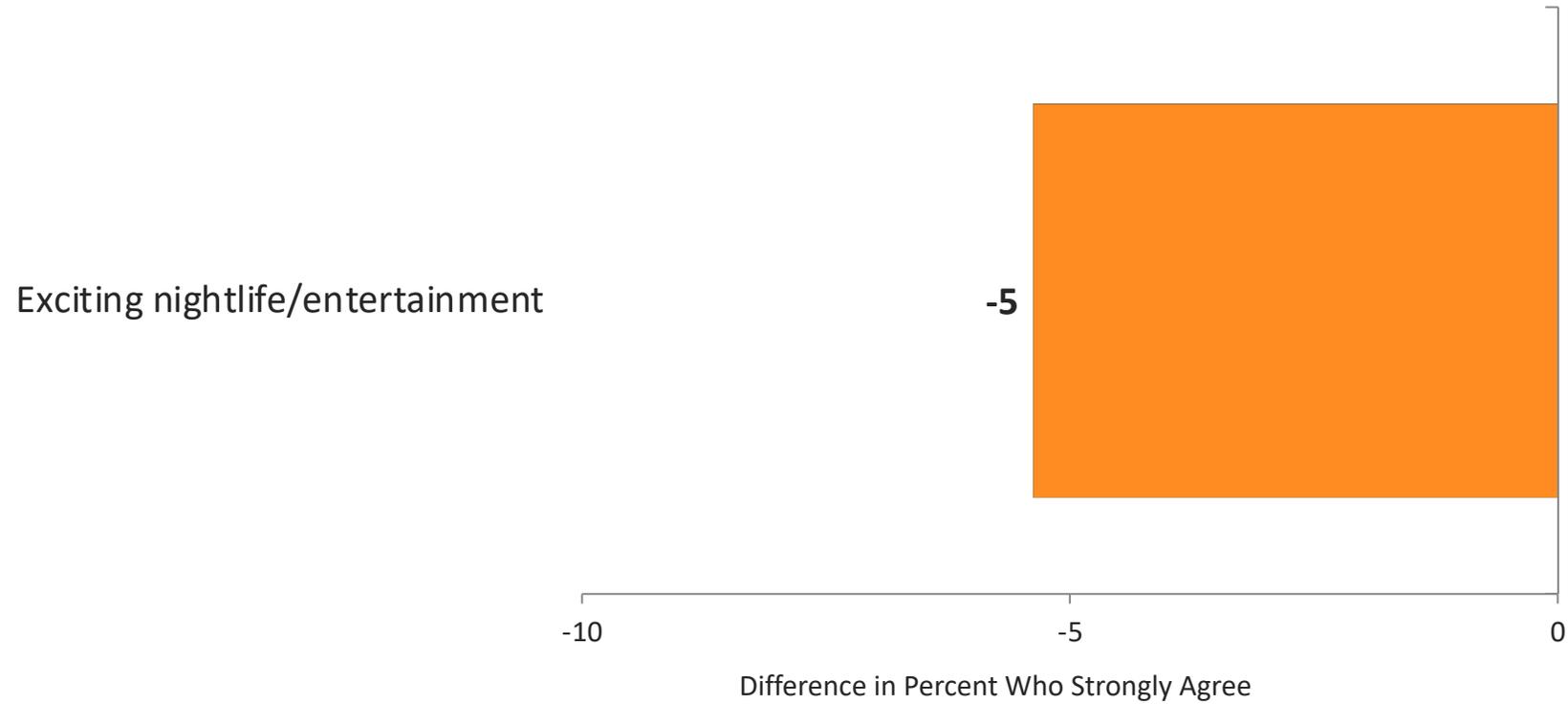


Kentucky's Image Strengths vs. Competition – New Markets



Kentucky's Image Weaknesses vs. Competition – New Markets

Base: New Markets



*This is Kentucky -
Come see for yourself.* **Kentucky**



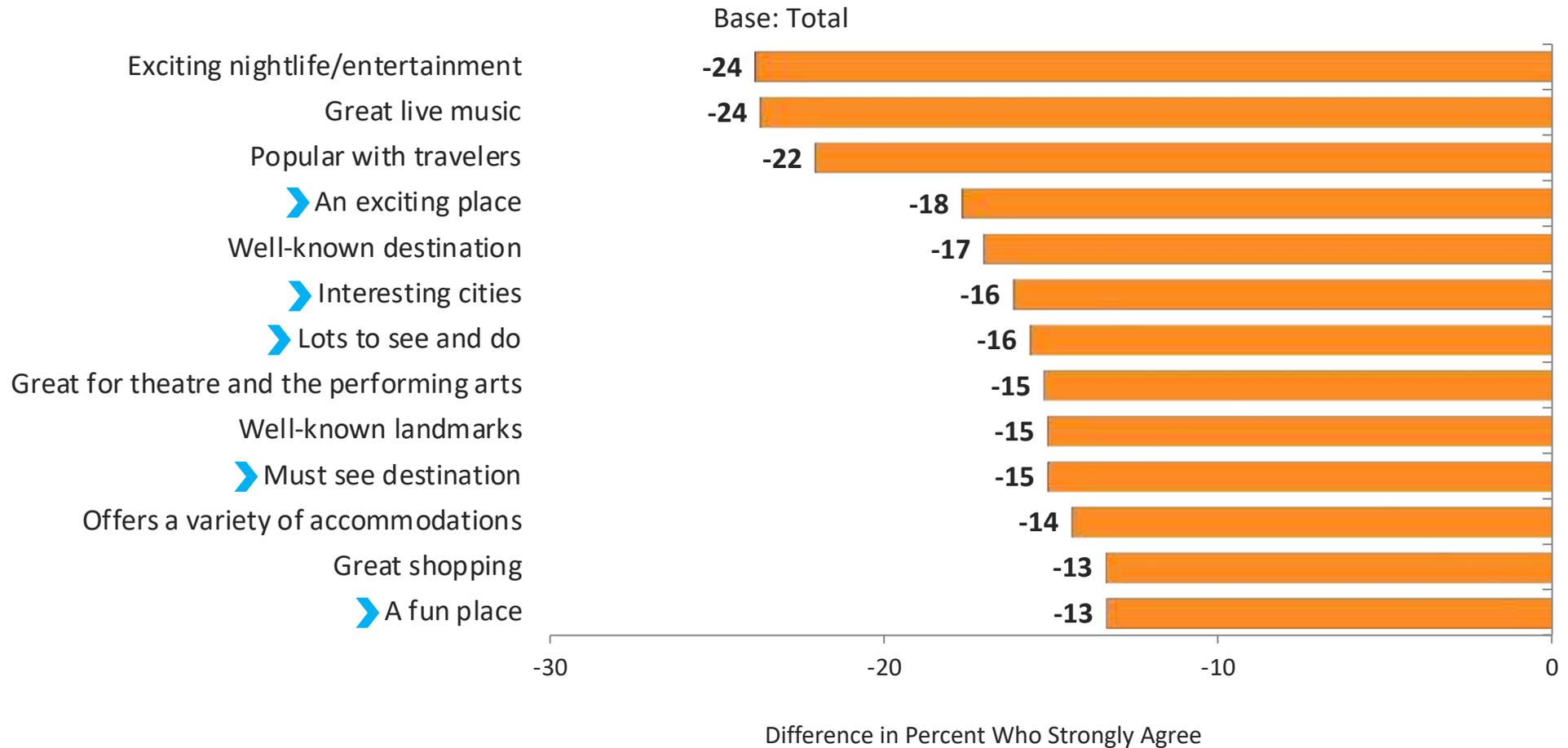
Longwoods
INTERNATIONAL

**Appendix: Kentucky's
Image Strengths &
Weaknesses vs.
Individual
Competitors
- Total**

Kentucky's Image Strengths vs. Tennessee – Total Markets

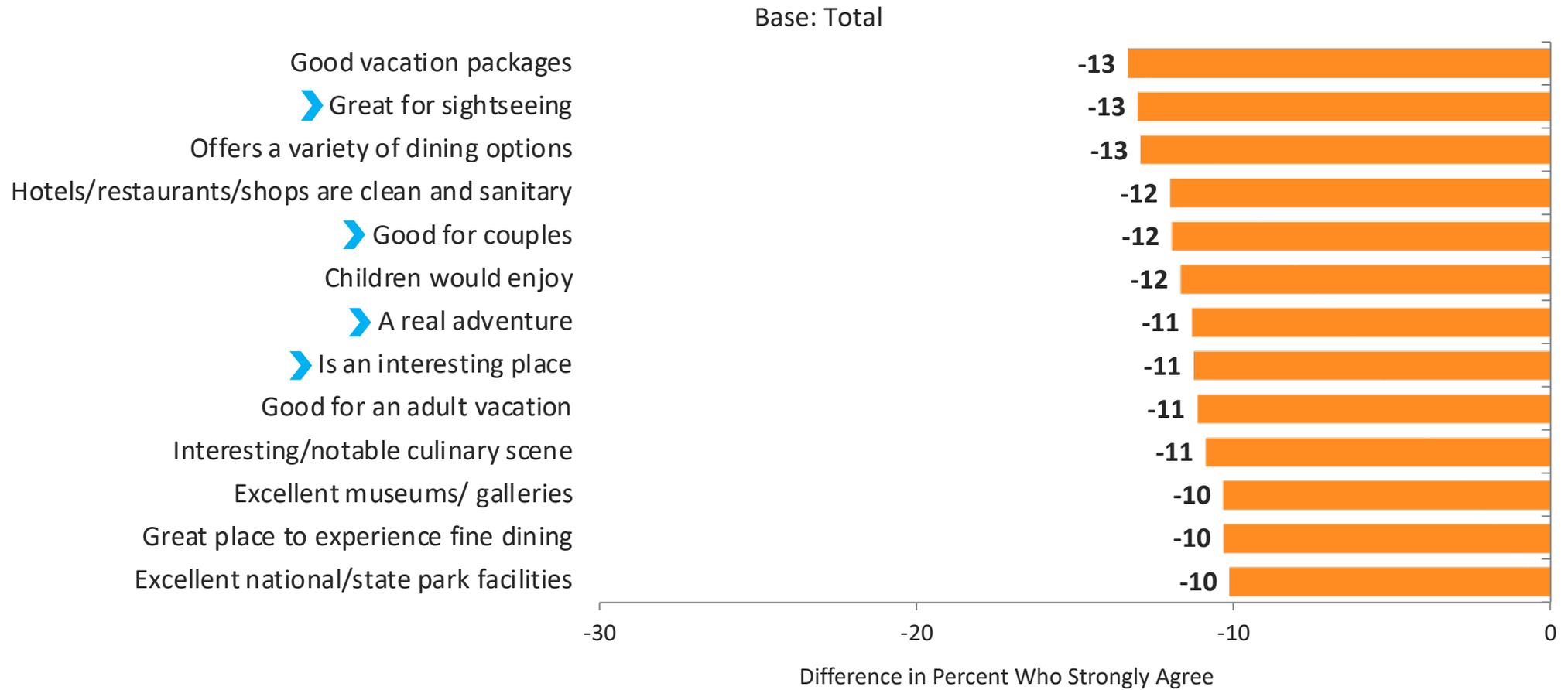
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
TENNESSEE**

Kentucky's Image Weaknesses vs. Tennessee – Total Markets



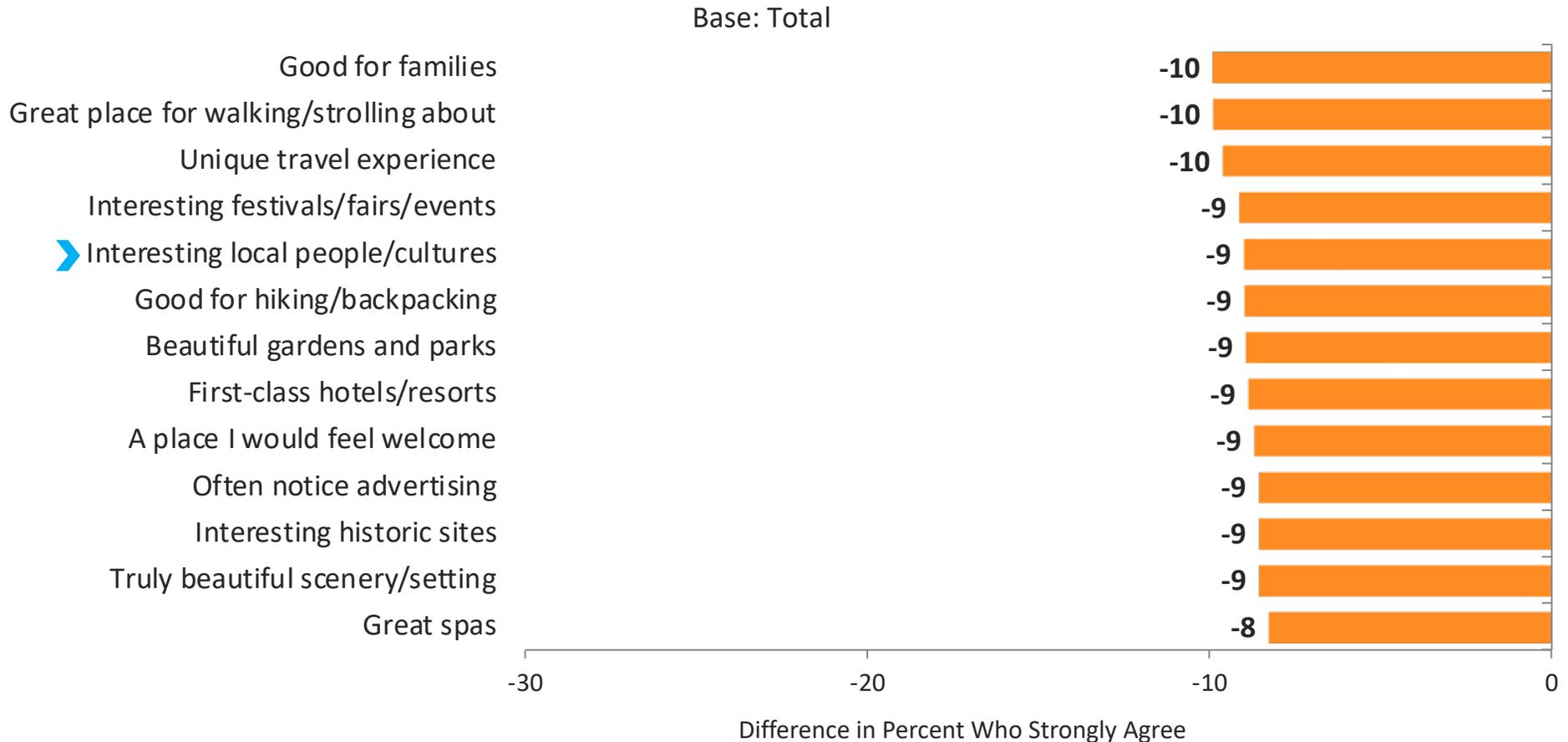
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – Total Markets (Cont'd)



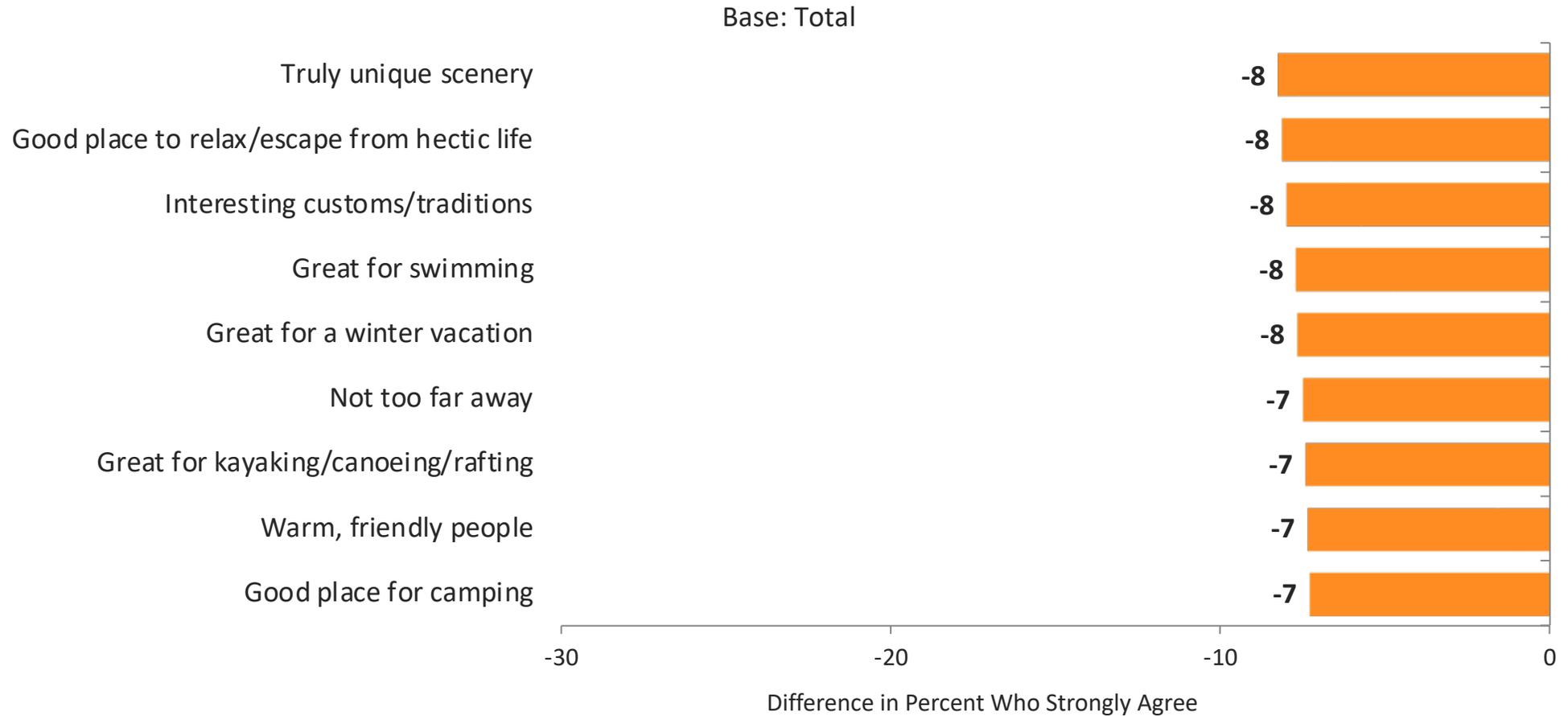
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – Total Markets (Cont'd)

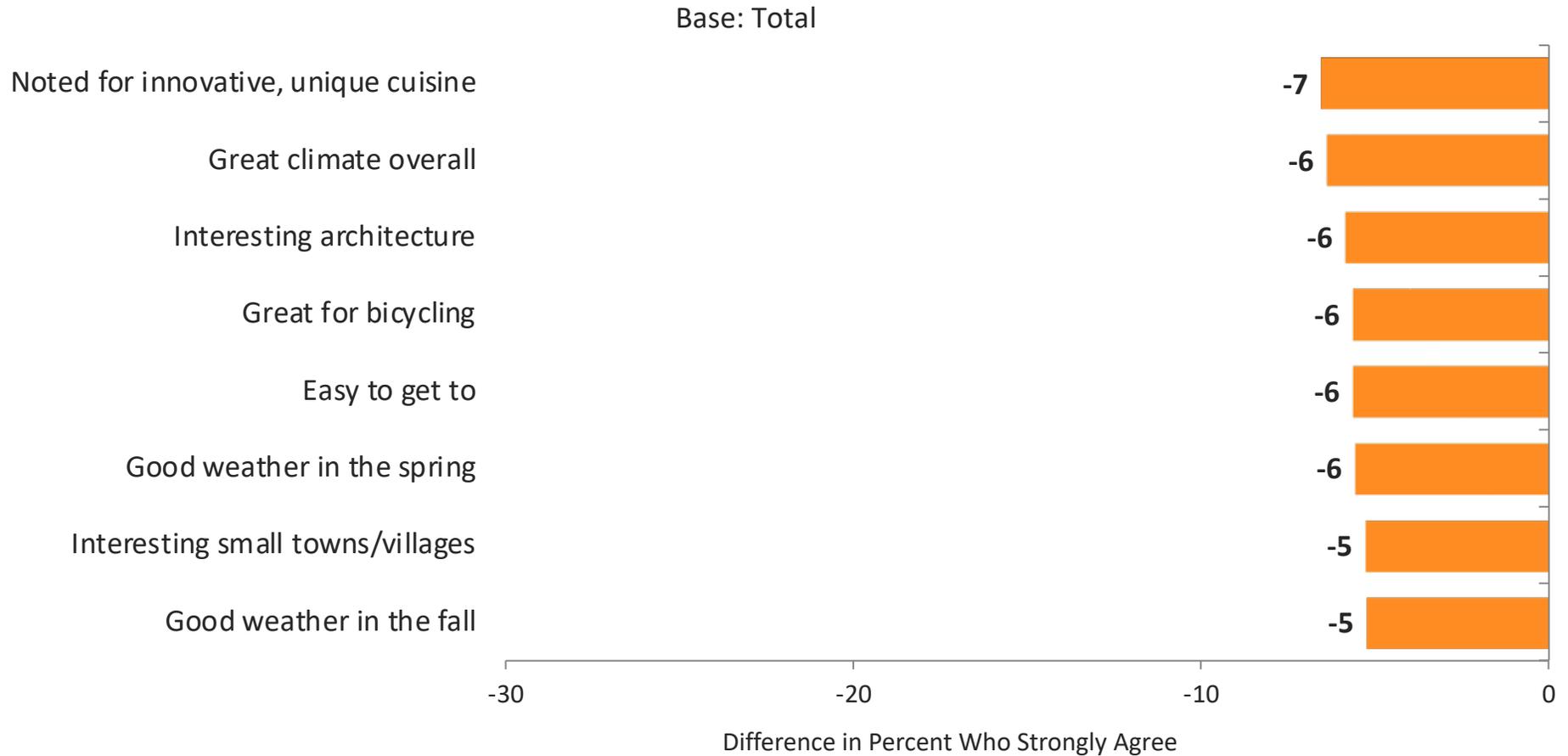


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

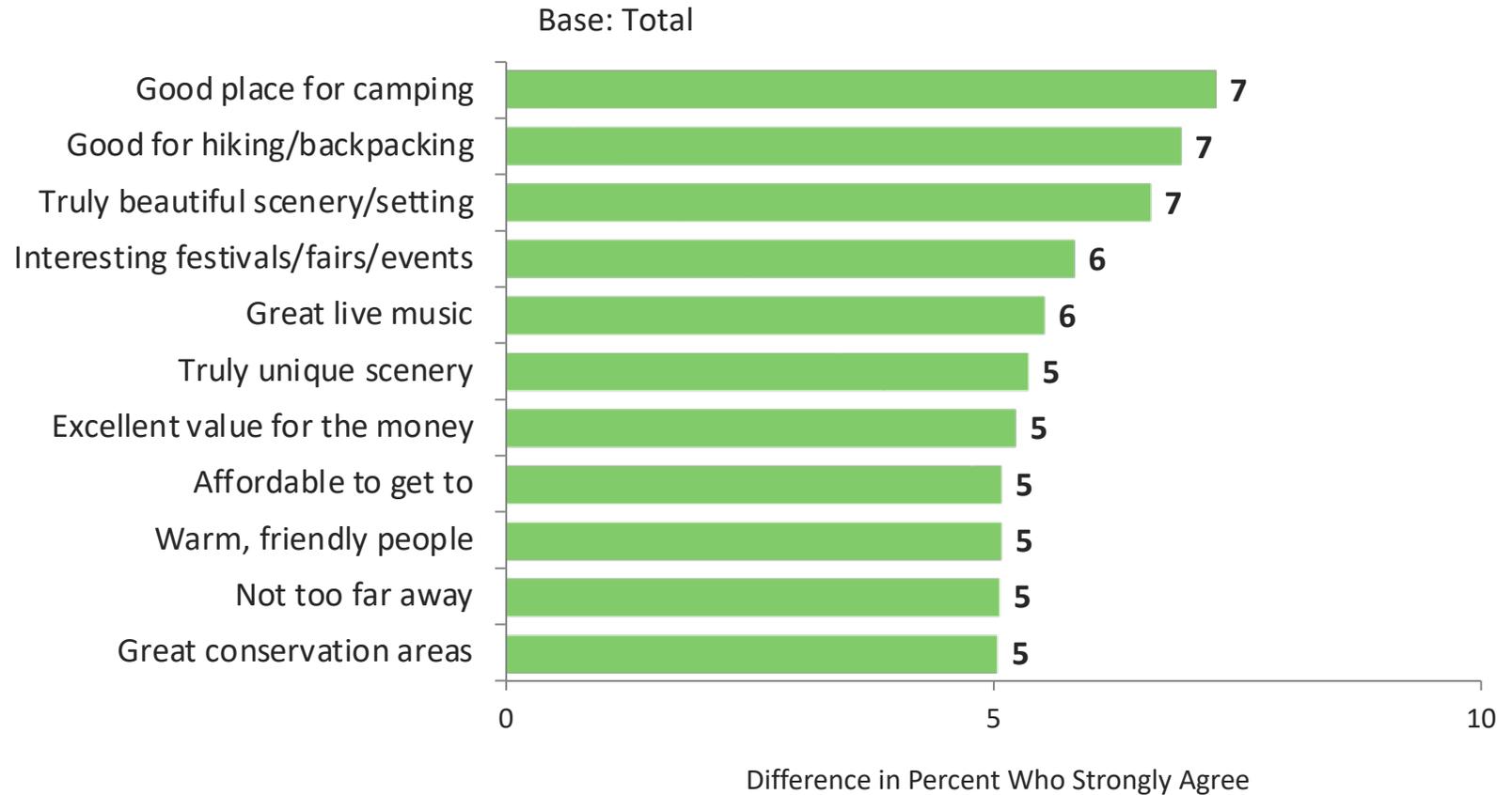
Kentucky's Image Weaknesses vs. Tennessee – Total Markets (Cont'd)



Kentucky's Image Weaknesses vs. Tennessee – Total Markets (Cont'd)



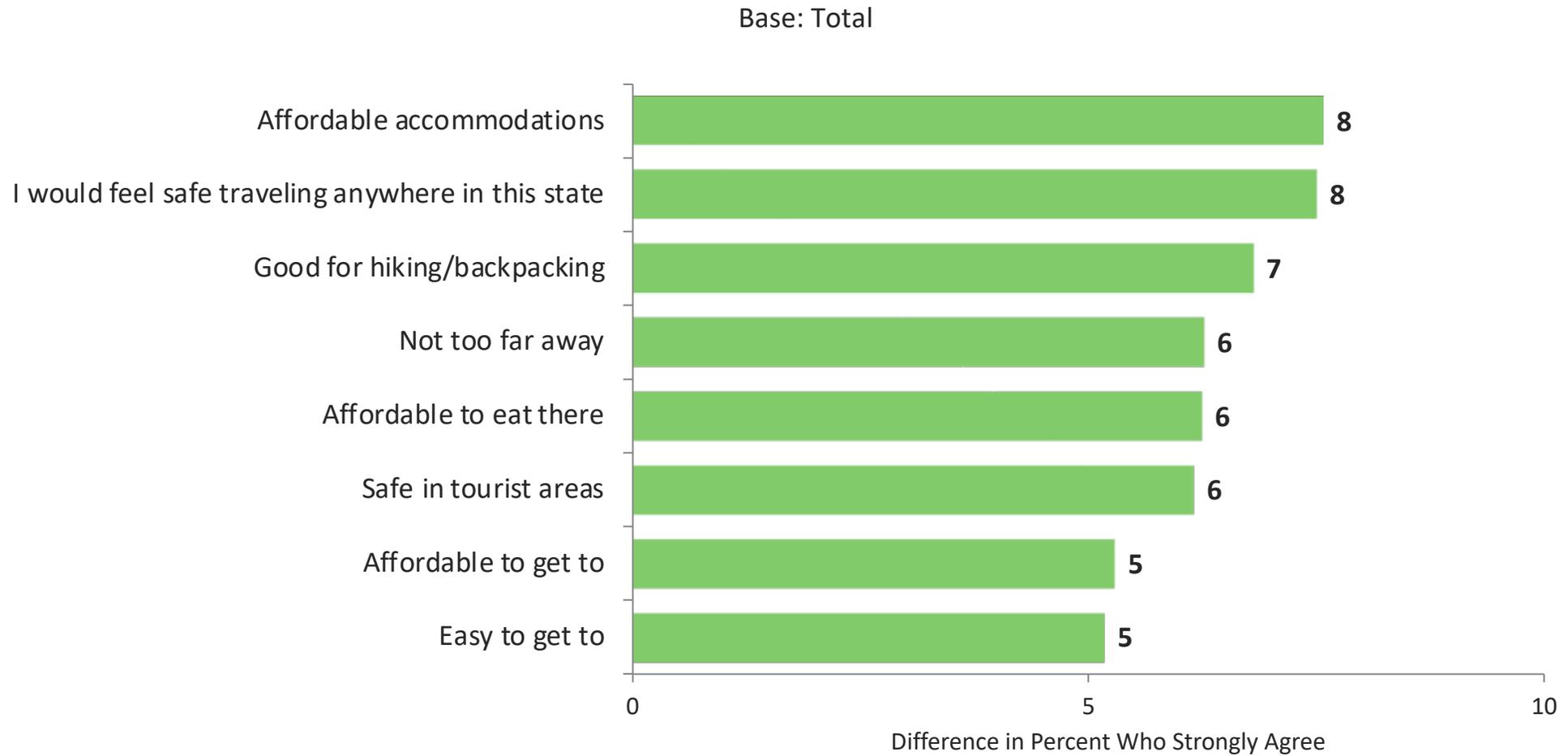
Kentucky's Image Strengths vs. Missouri – Total Markets



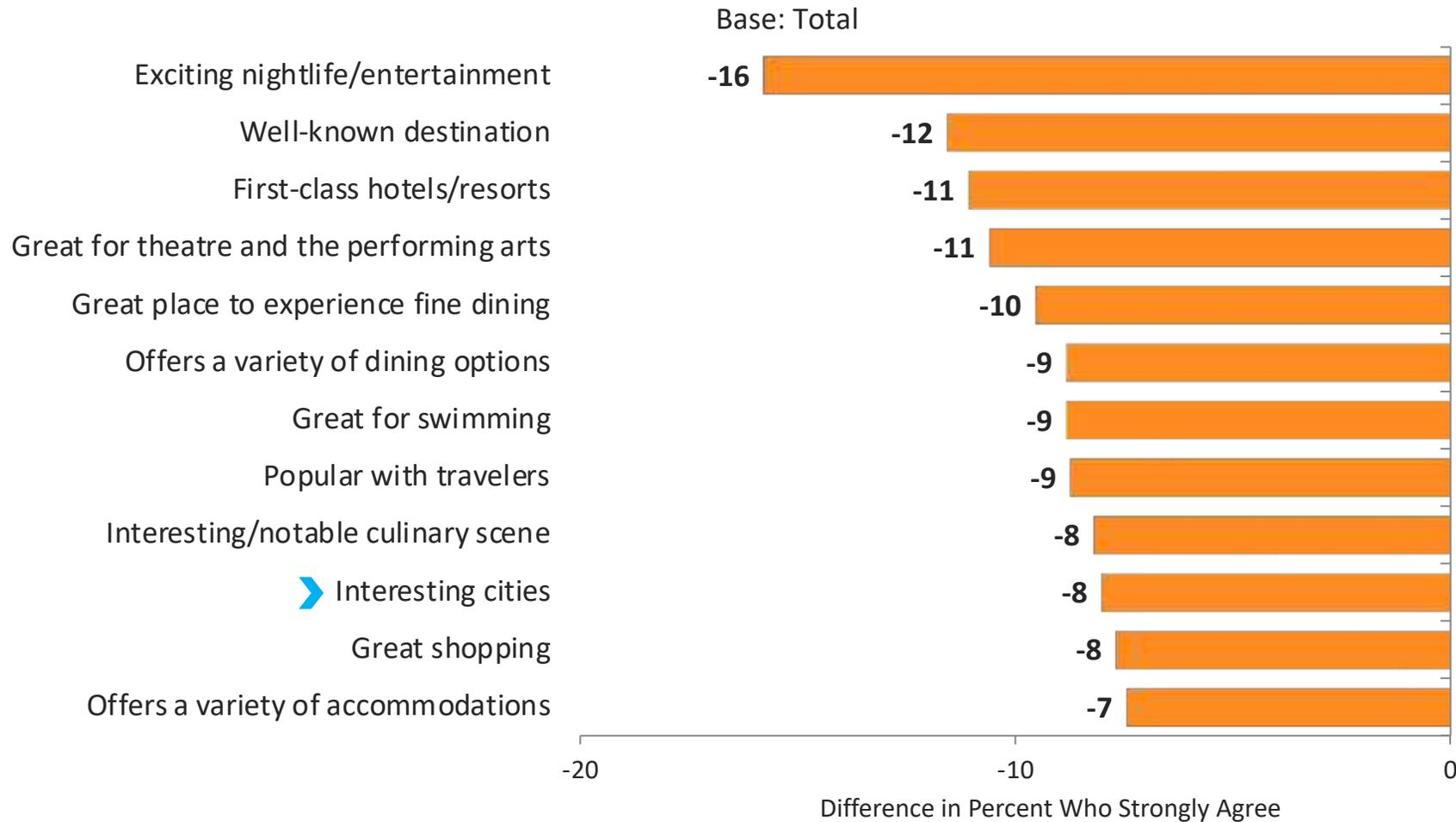
Kentucky's Image Weaknesses vs. Missouri – Total Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. MISSOURI**

Kentucky's Image Strengths vs. Georgia – Total Markets

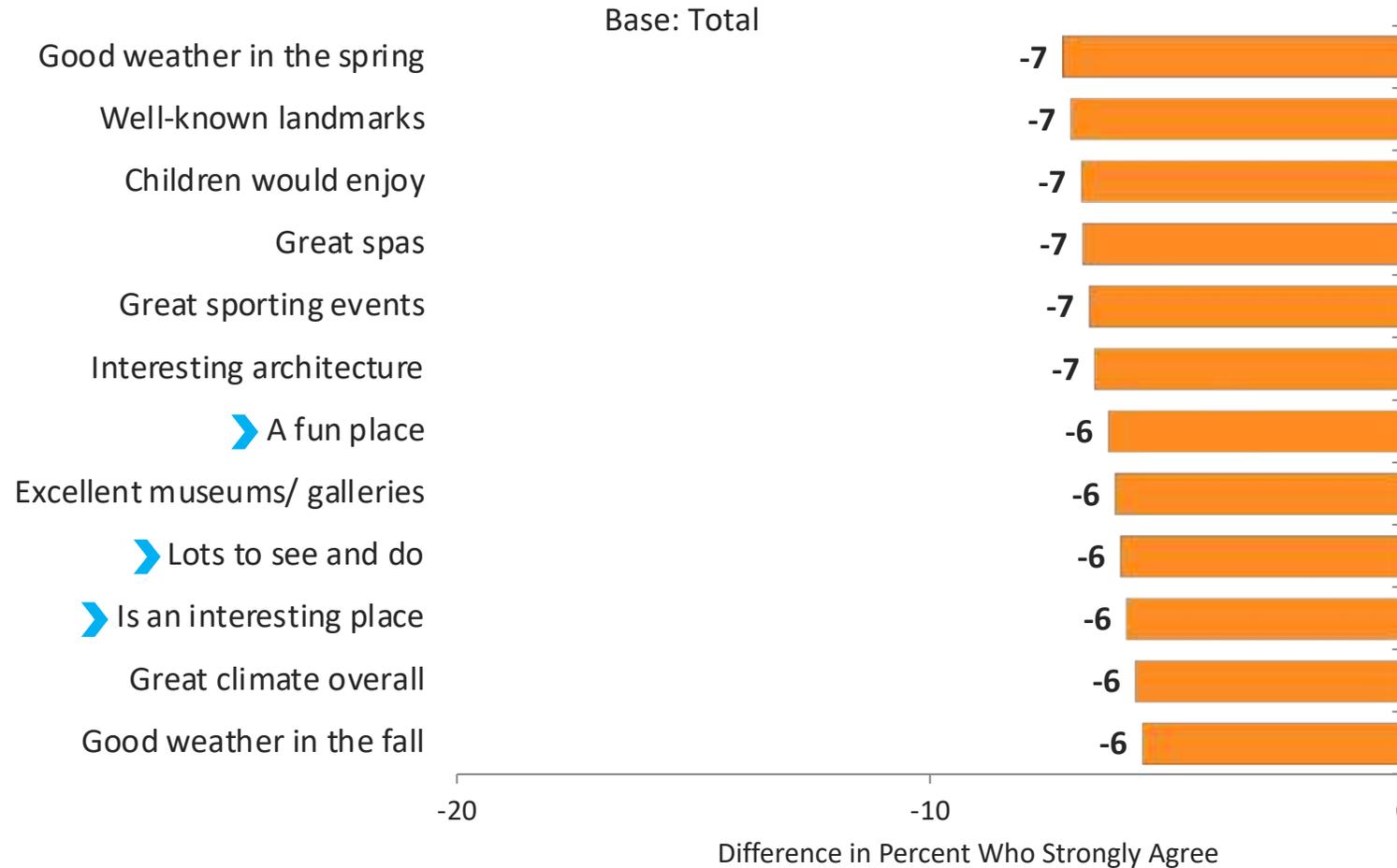


Kentucky's Image Weaknesses vs. Georgia – Total Markets



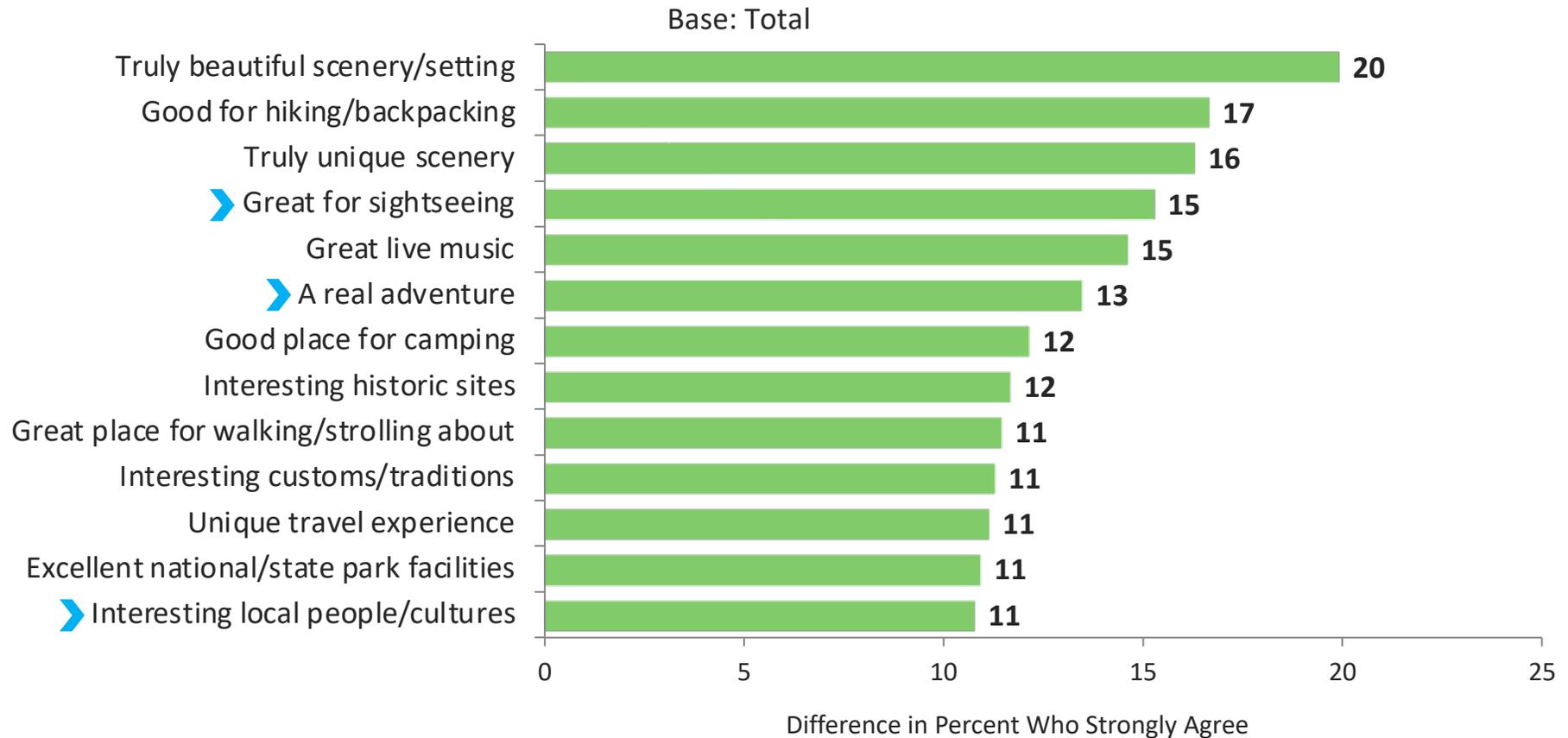
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Georgia – Total Markets (Cont'd)



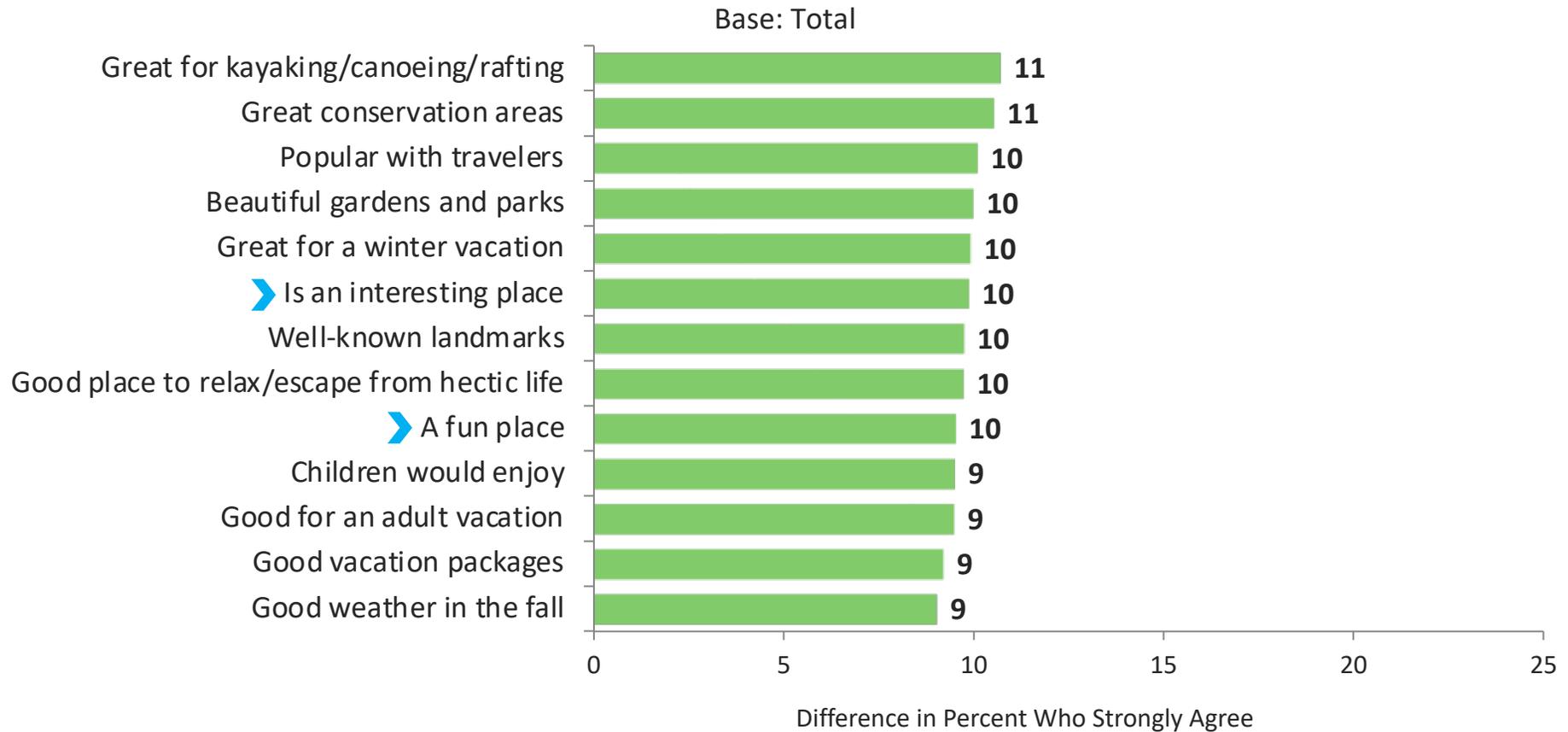
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Total Markets



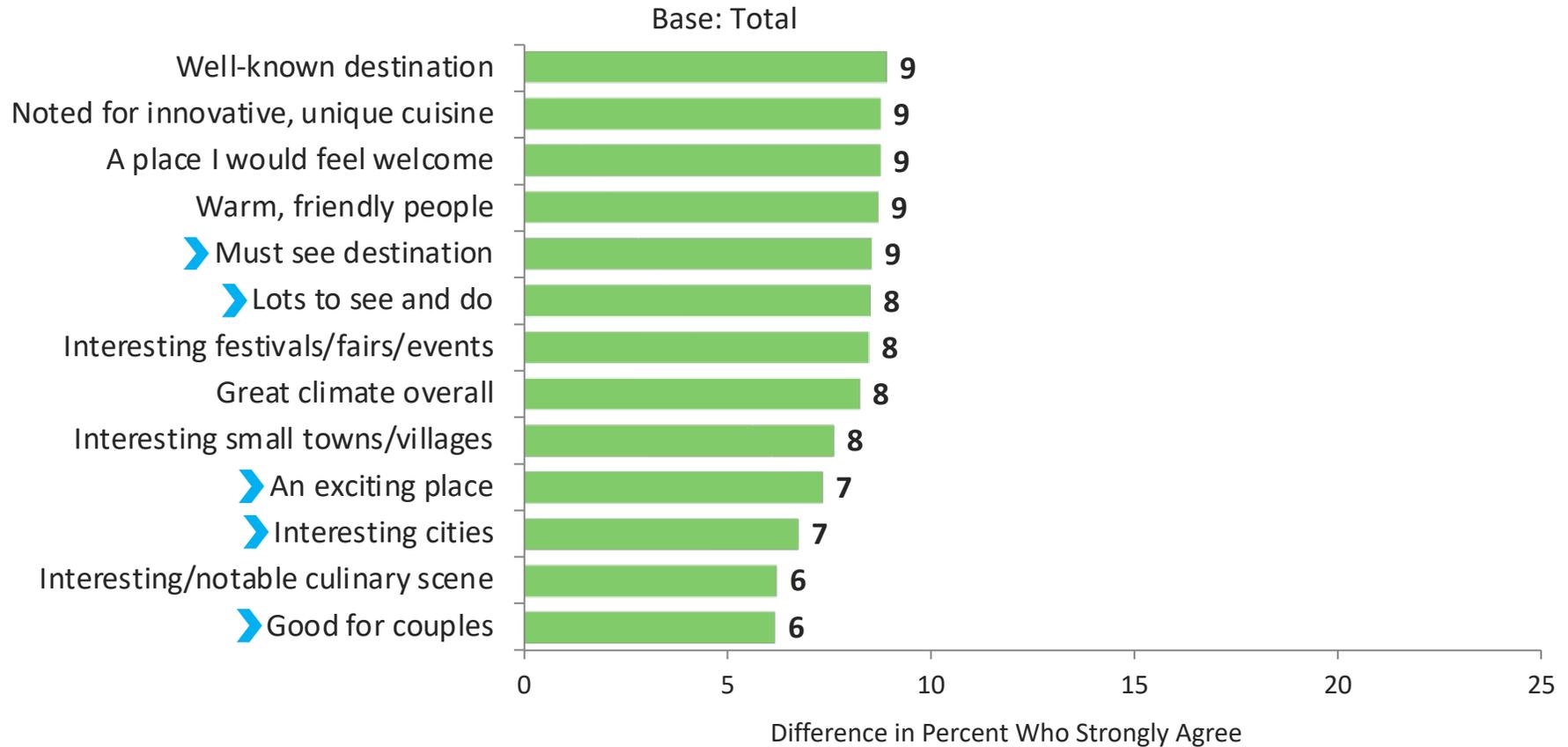
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Total Markets (Cont'd)



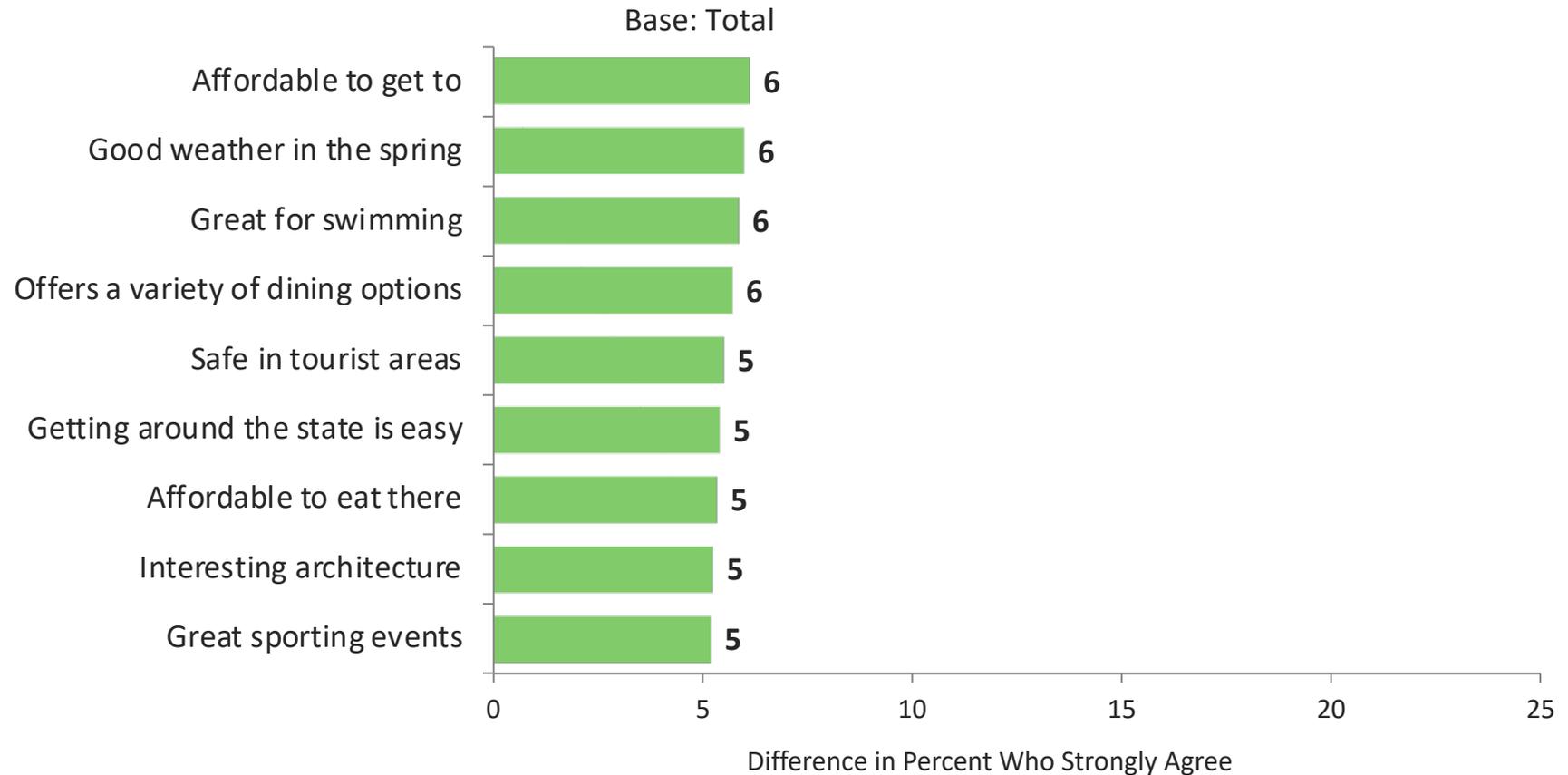
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Total Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Total Markets (Cont'd)

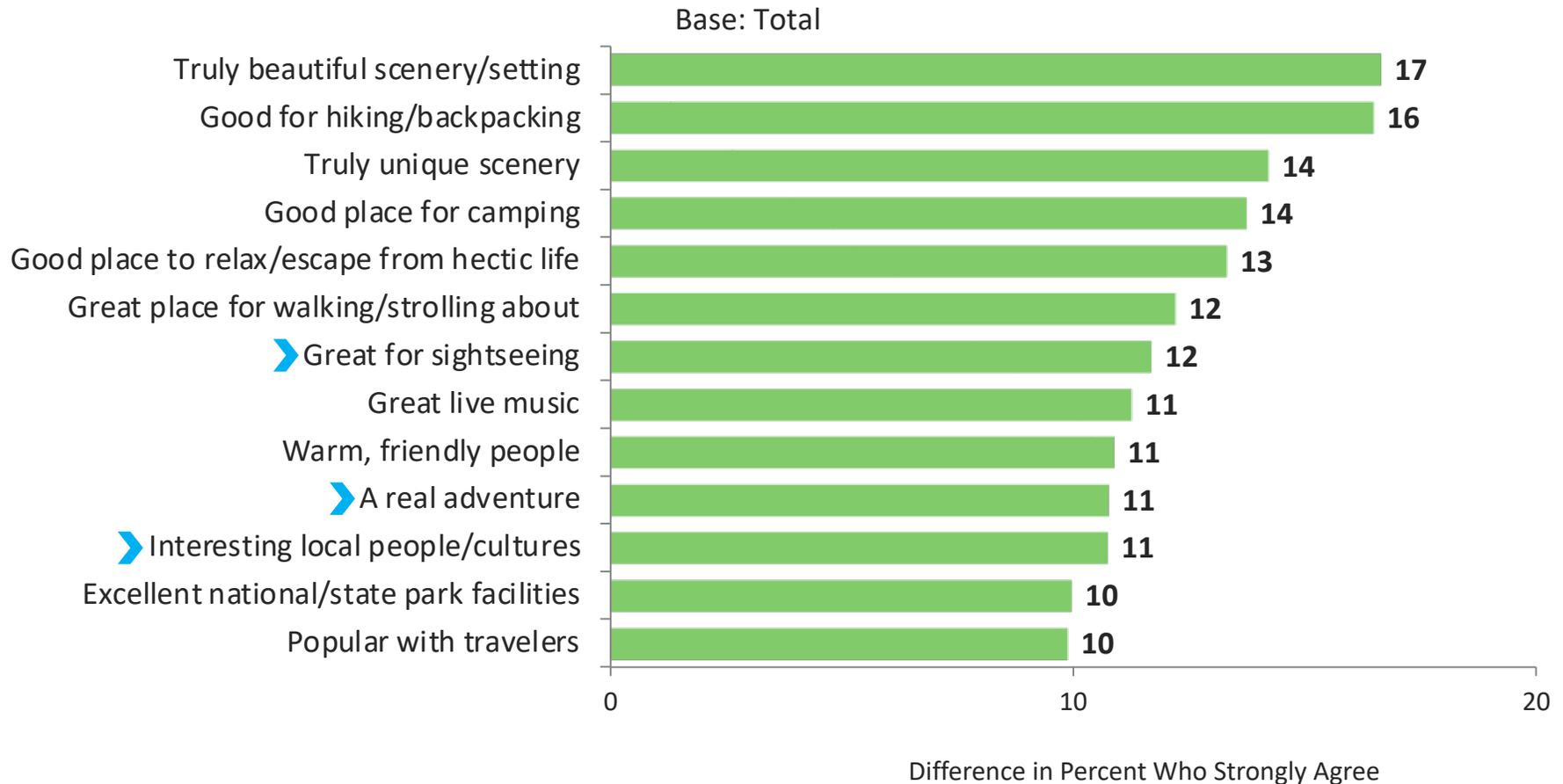


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Indiana – Total Markets

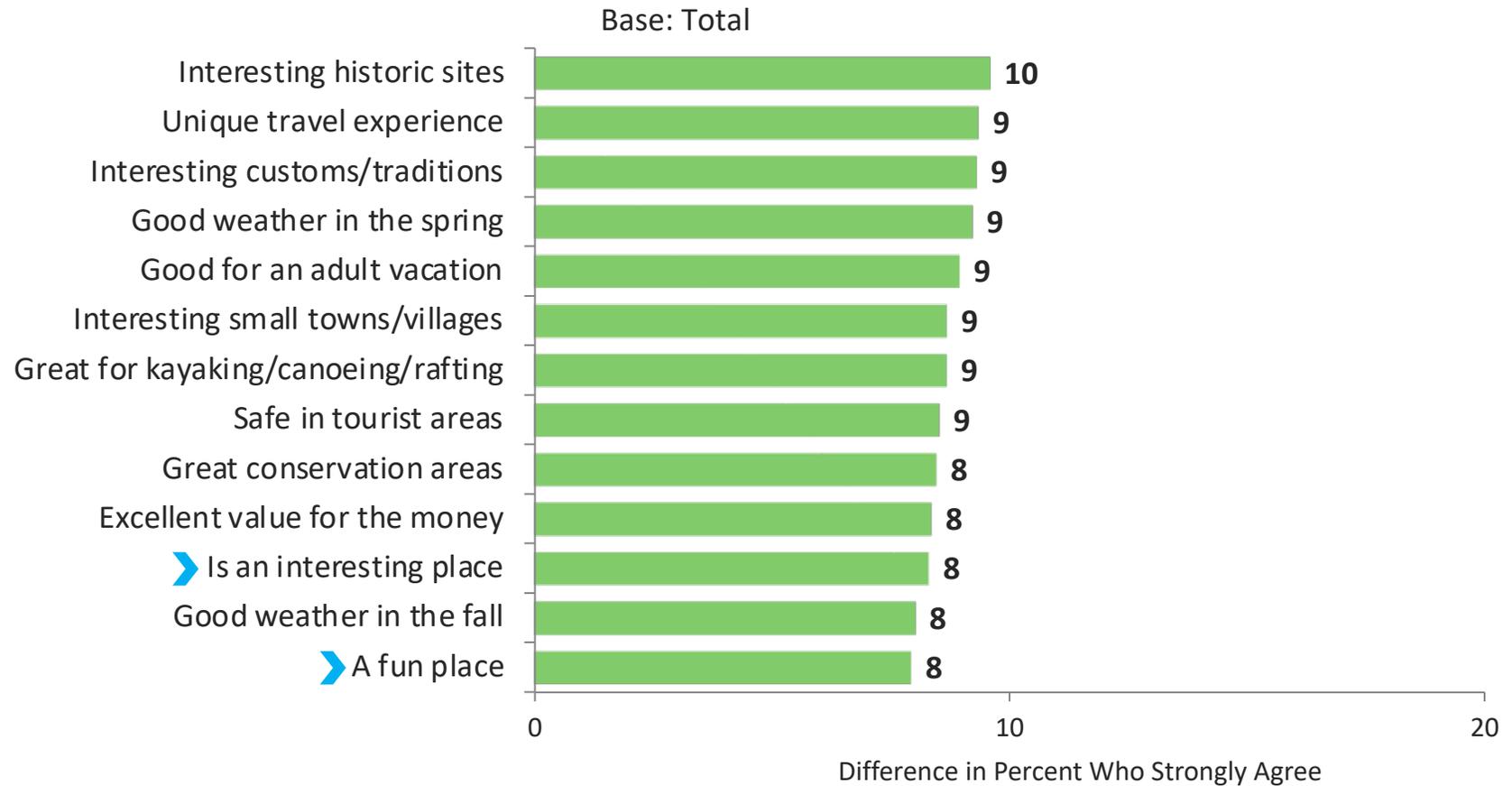
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. INDIANA**

Kentucky's Image Strengths vs. Ohio – Total Markets



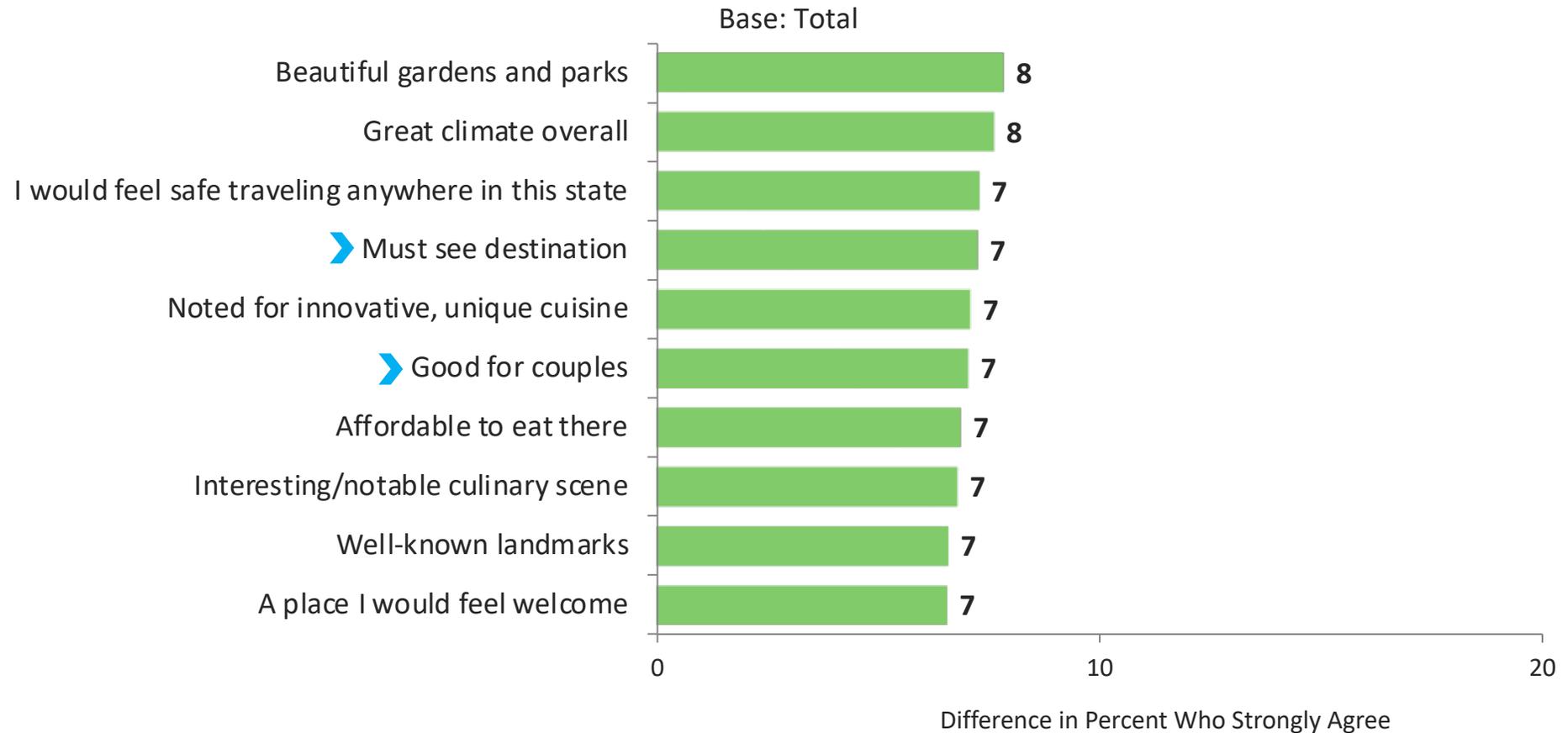
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – Total Markets (Cont'd)



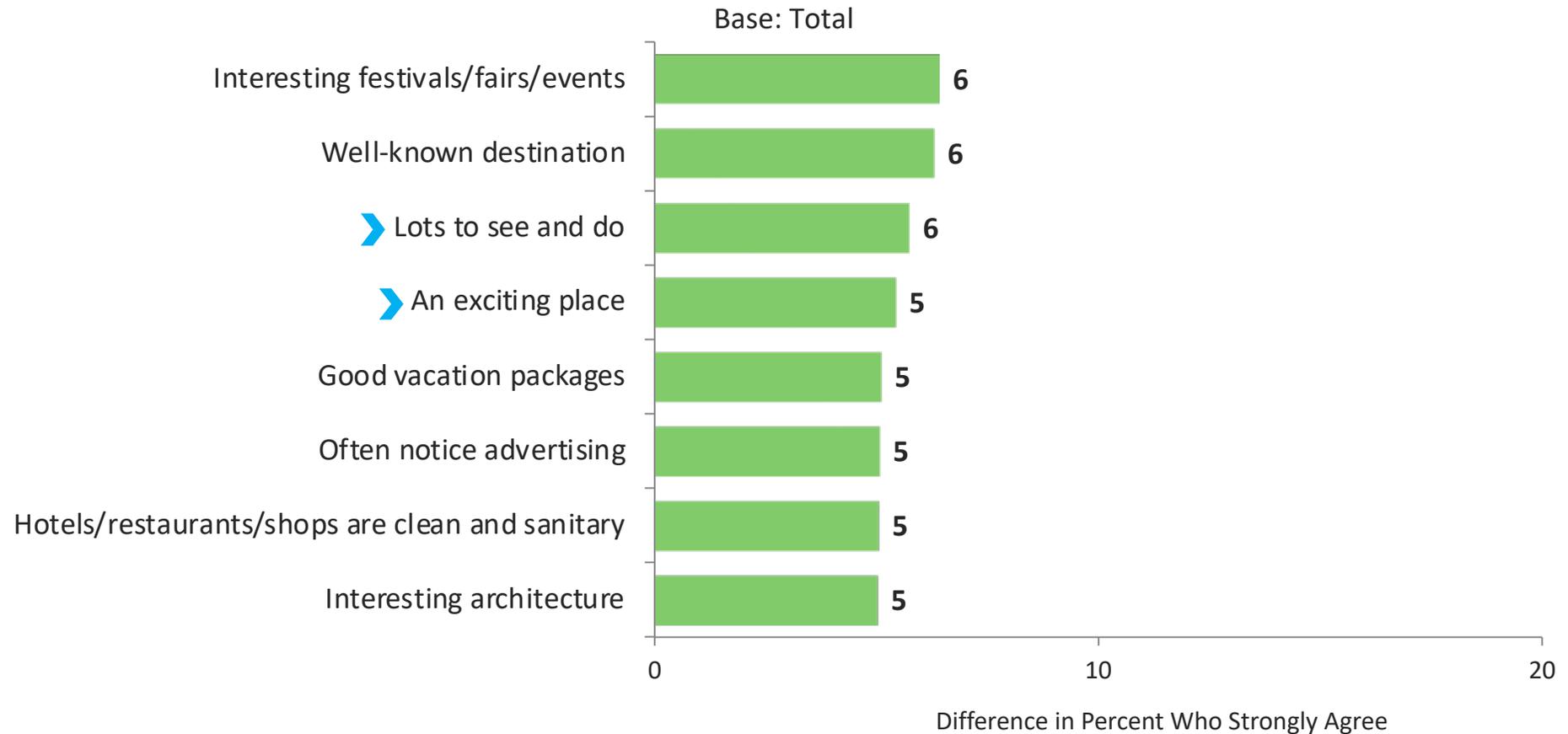
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – Total Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

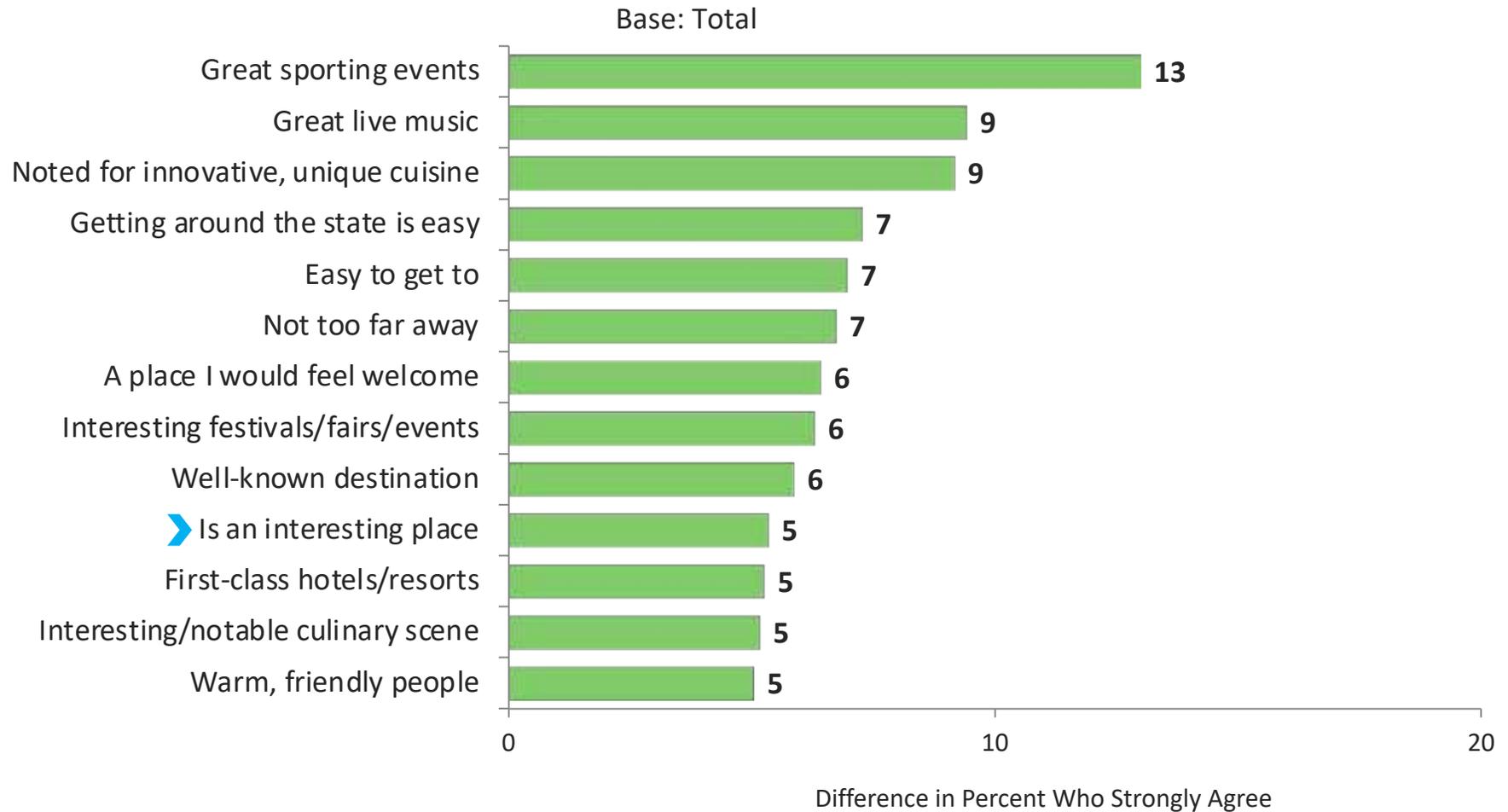
Kentucky's Image Strengths vs. Ohio – Total Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. OHIO**

Kentucky's Image Strengths vs. West Virginia – Total Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. West Virginia – Total Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. WEST VIRGINIA**

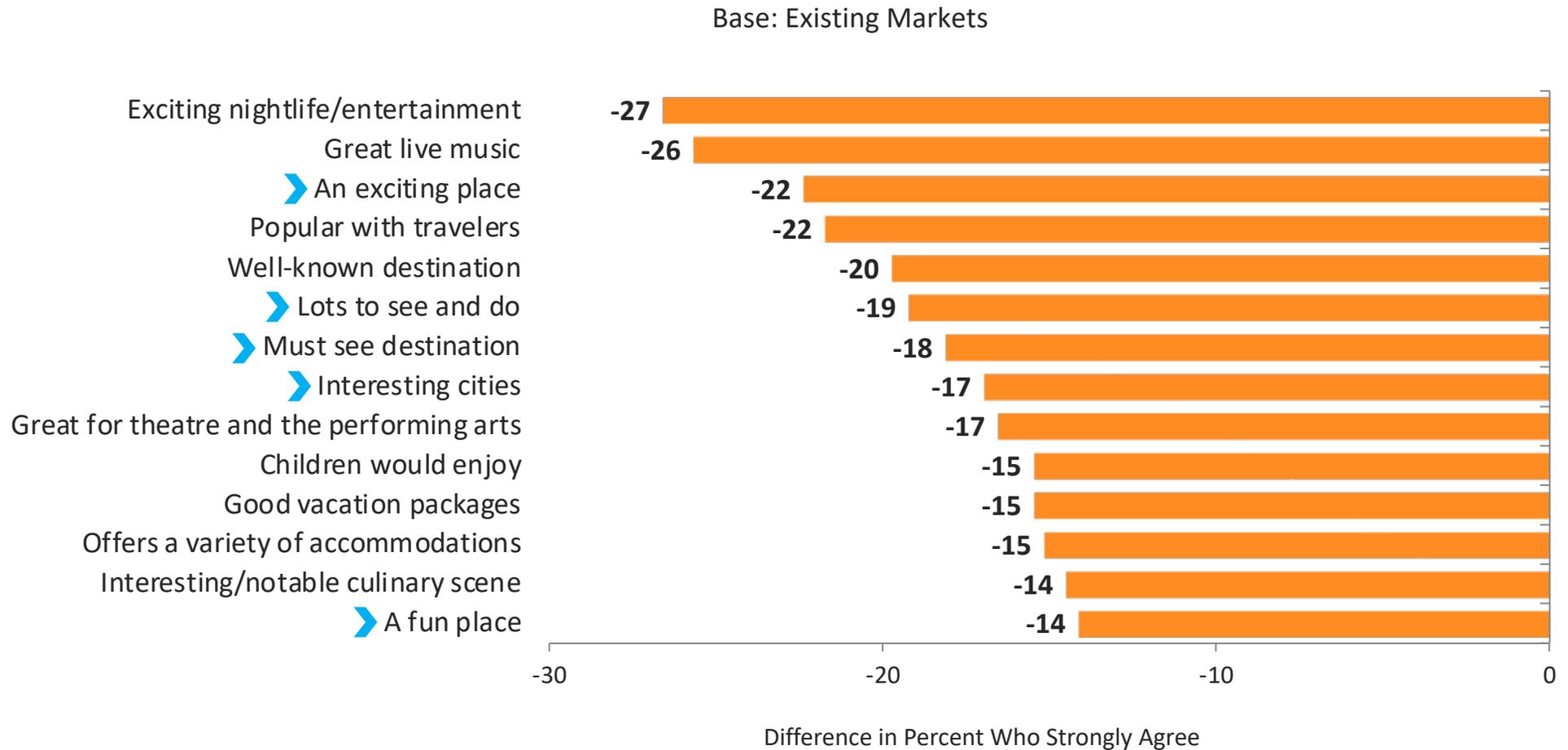


**Appendix: Kentucky's
Image Strengths &
Weaknesses vs.
Individual
Competitors
- Existing Markets**

Kentucky's Image Strengths vs. Tennessee – Existing Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
TENNESSEE**

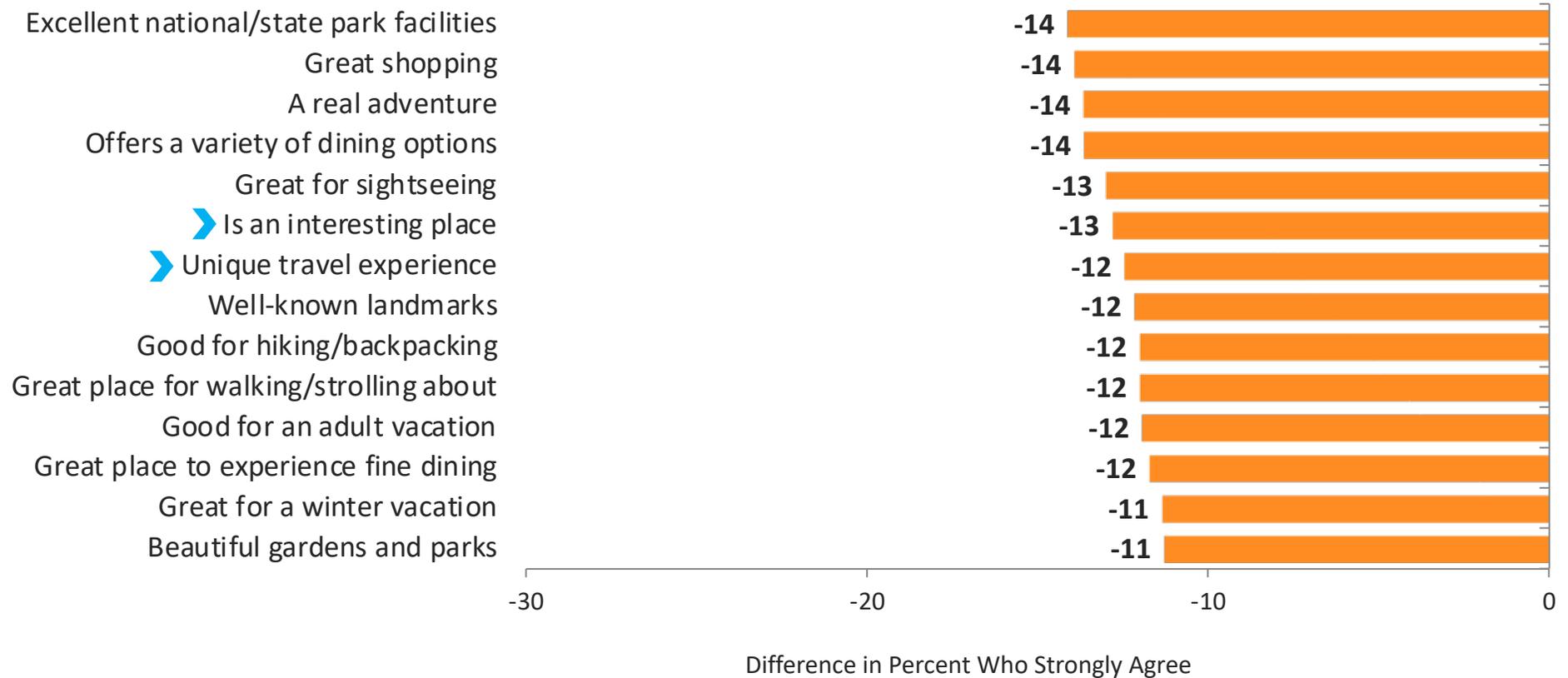
Kentucky's Image Weaknesses vs. Tennessee – Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – Existing Markets (Cont'd)

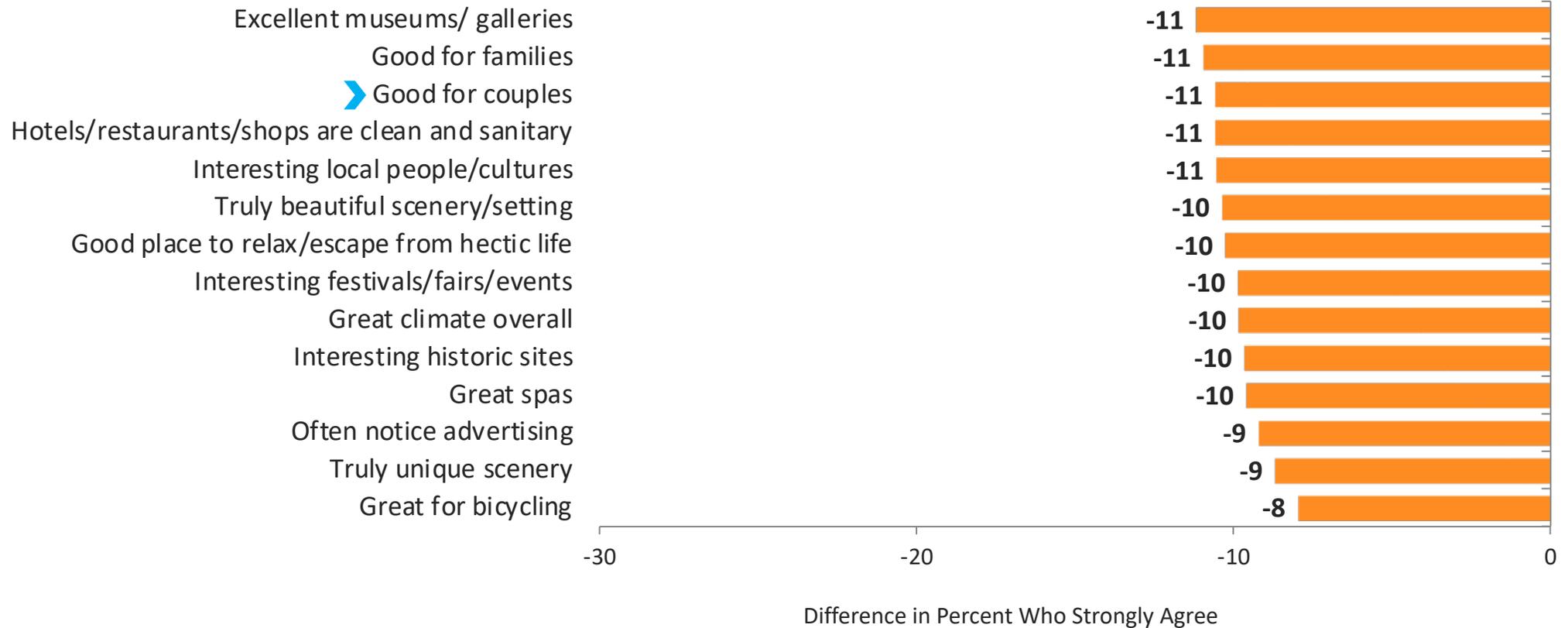
Base: Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – Existing Markets (Cont'd)

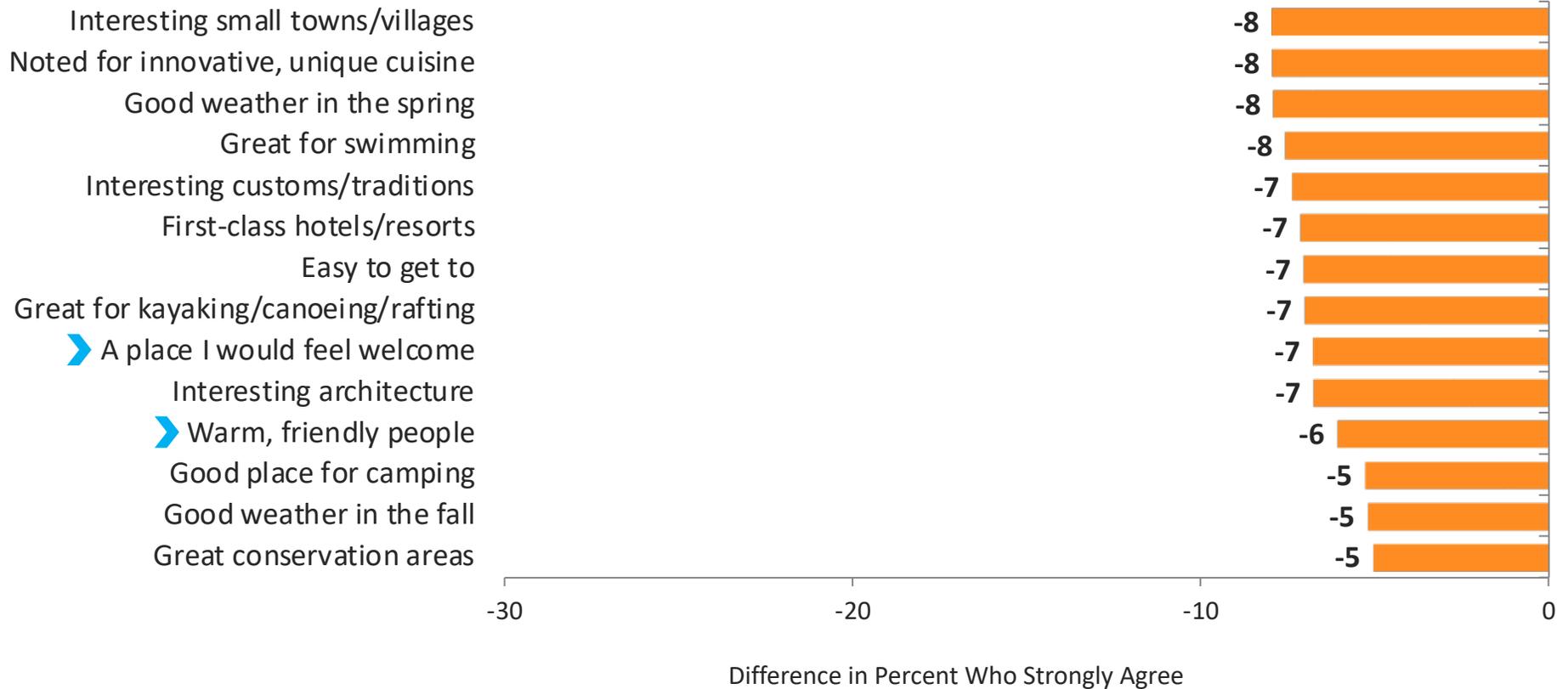
Base: Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

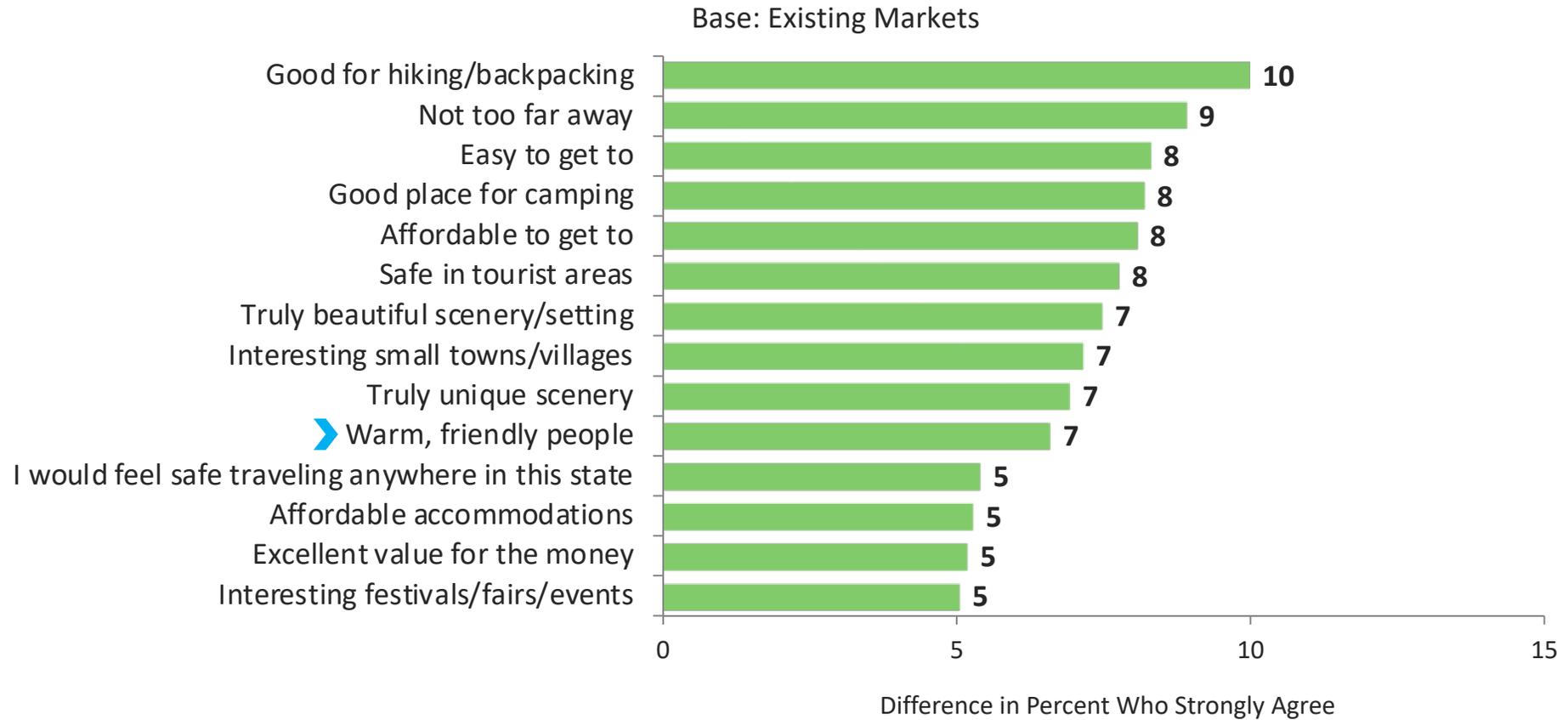
Kentucky's Image Weaknesses vs. Tennessee – Existing Markets (Cont'd)

Base: Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Missouri – Existing Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

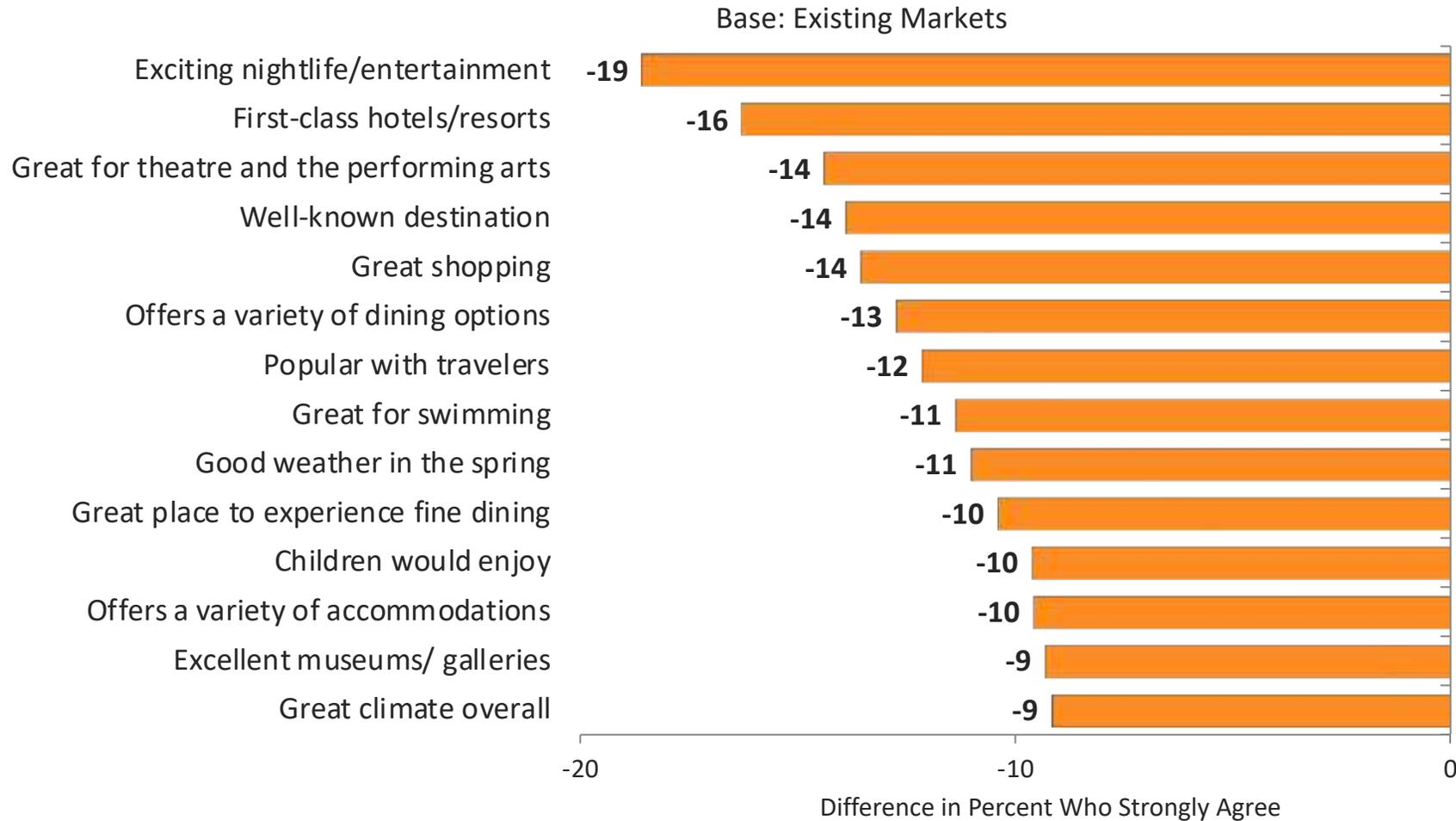
Kentucky's Image Weaknesses vs. Missouri – Existing Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. MISSOURI**

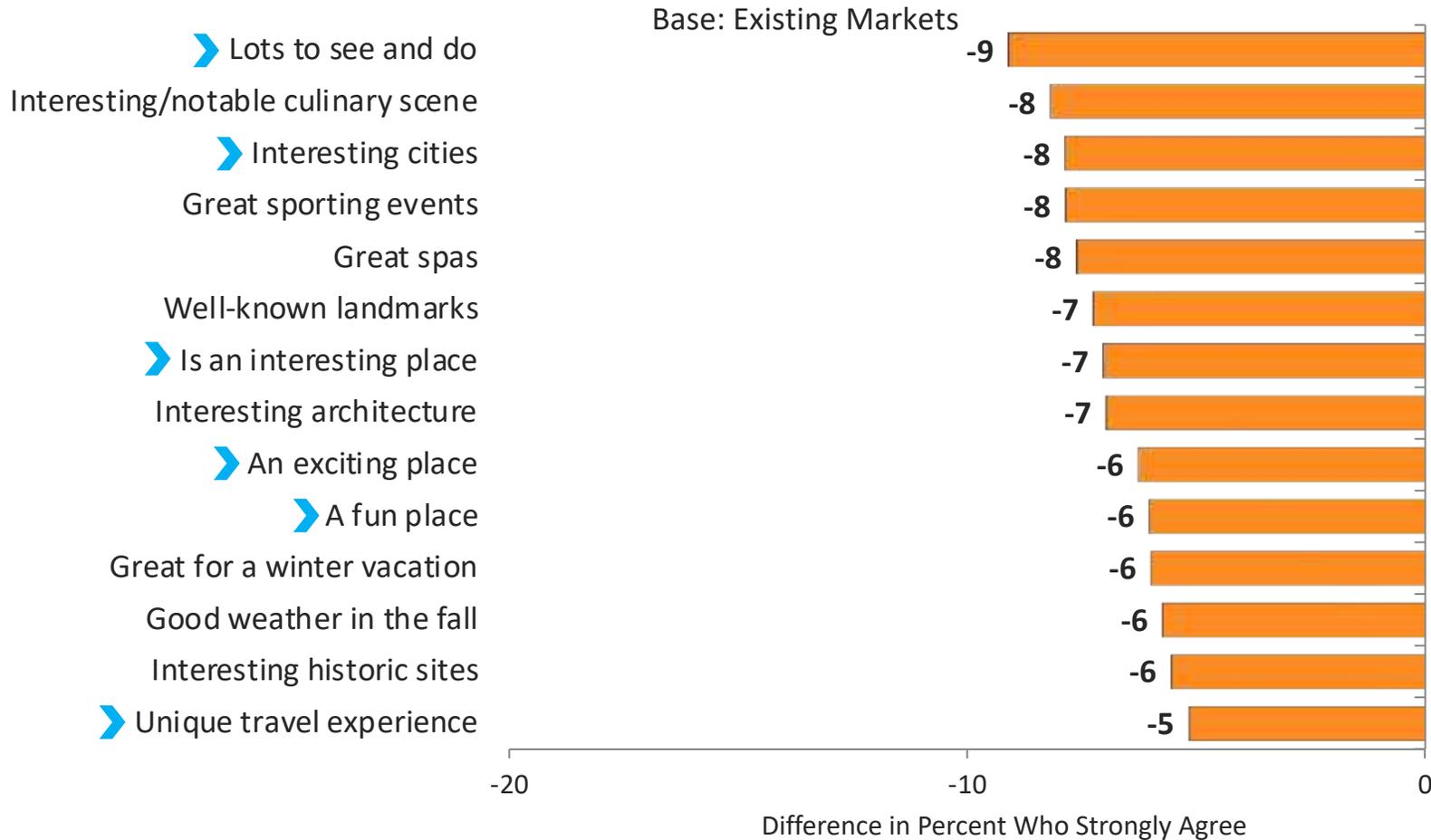
Kentucky's Image Strengths vs. Georgia – Existing Markets



Kentucky's Image Weaknesses vs. Georgia – Existing Markets

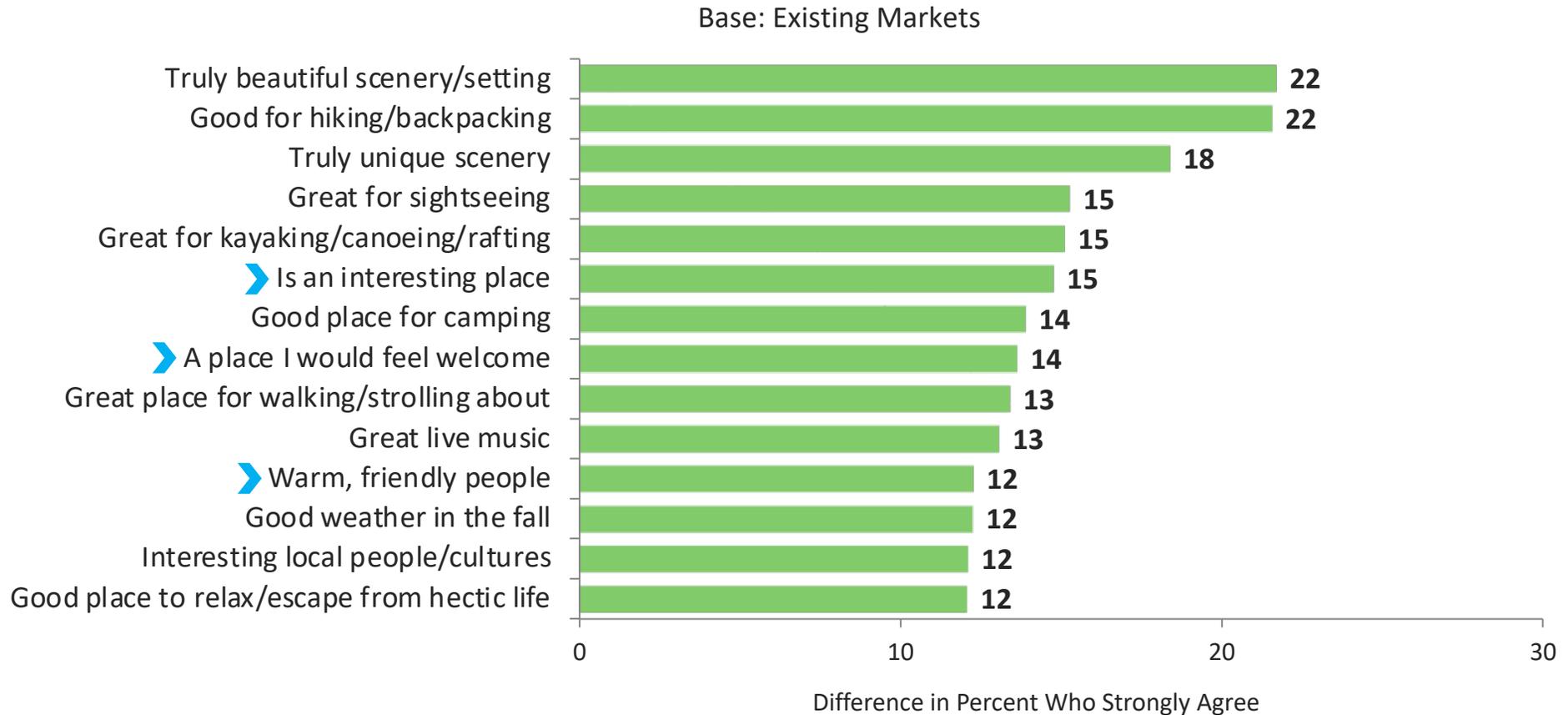


Kentucky's Image Weaknesses vs. Georgia – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Existing Markets



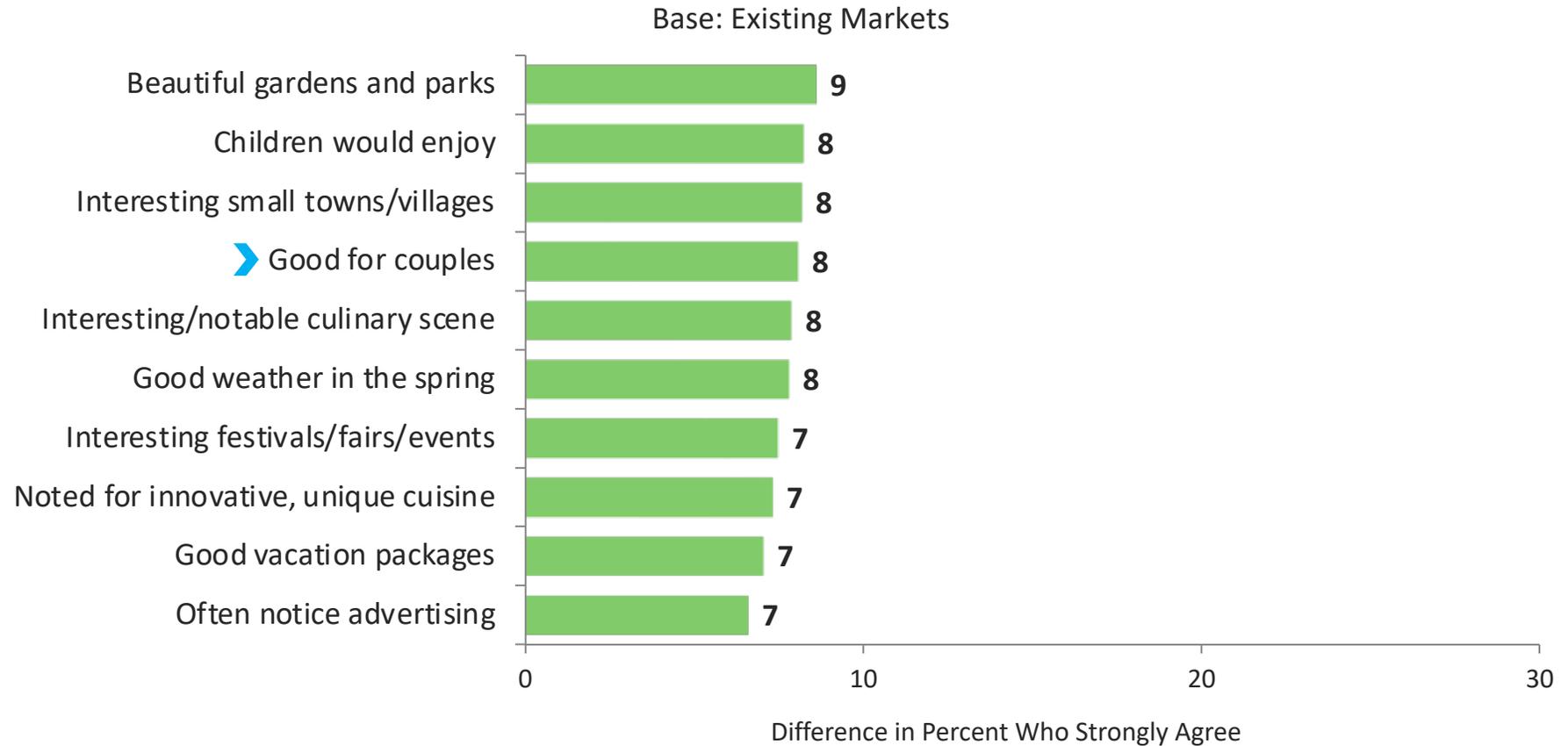
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – Existing Markets (Cont'd)

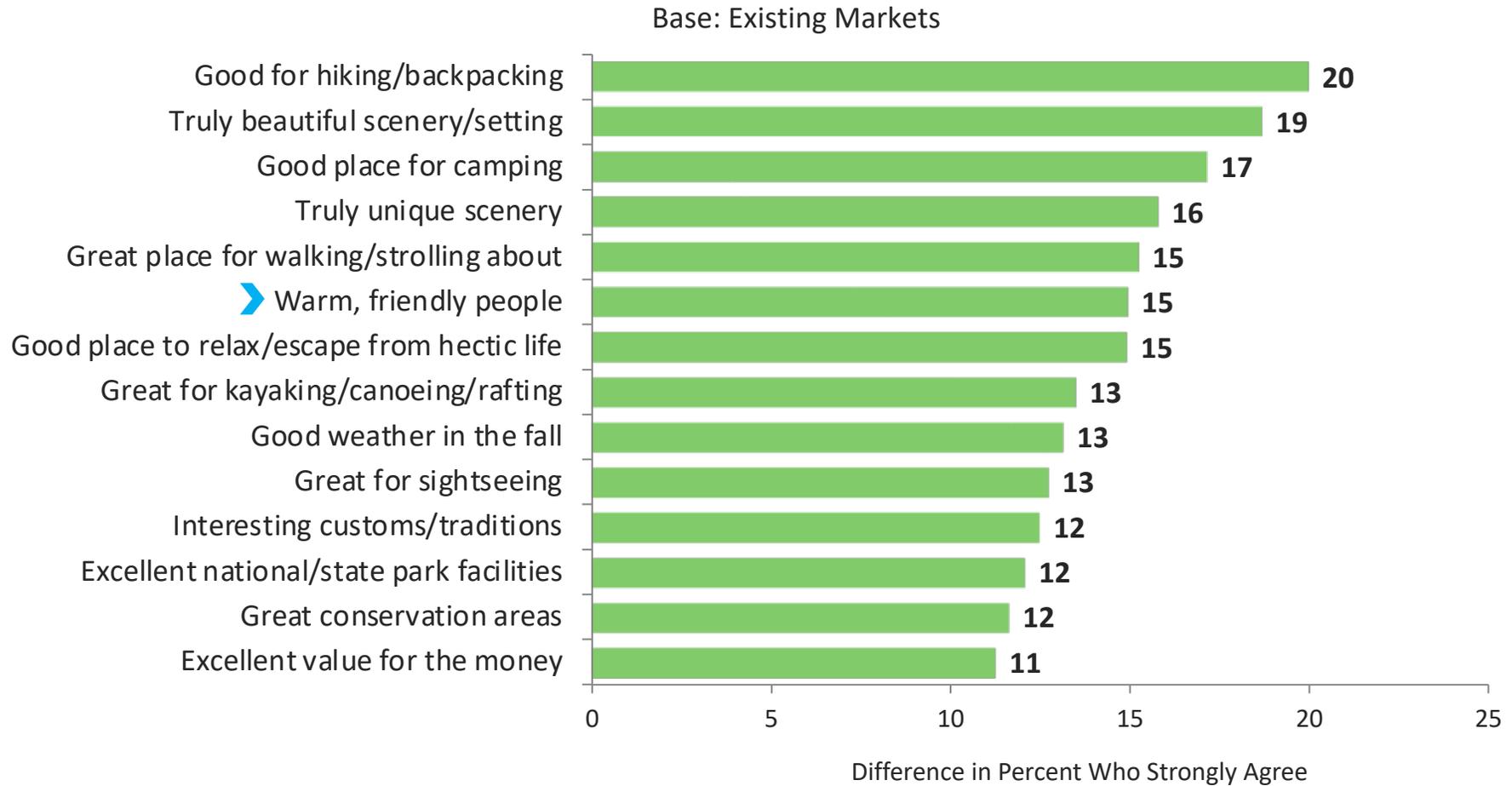


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Kentucky's Image Weaknesses vs. Indiana – Existing Markets

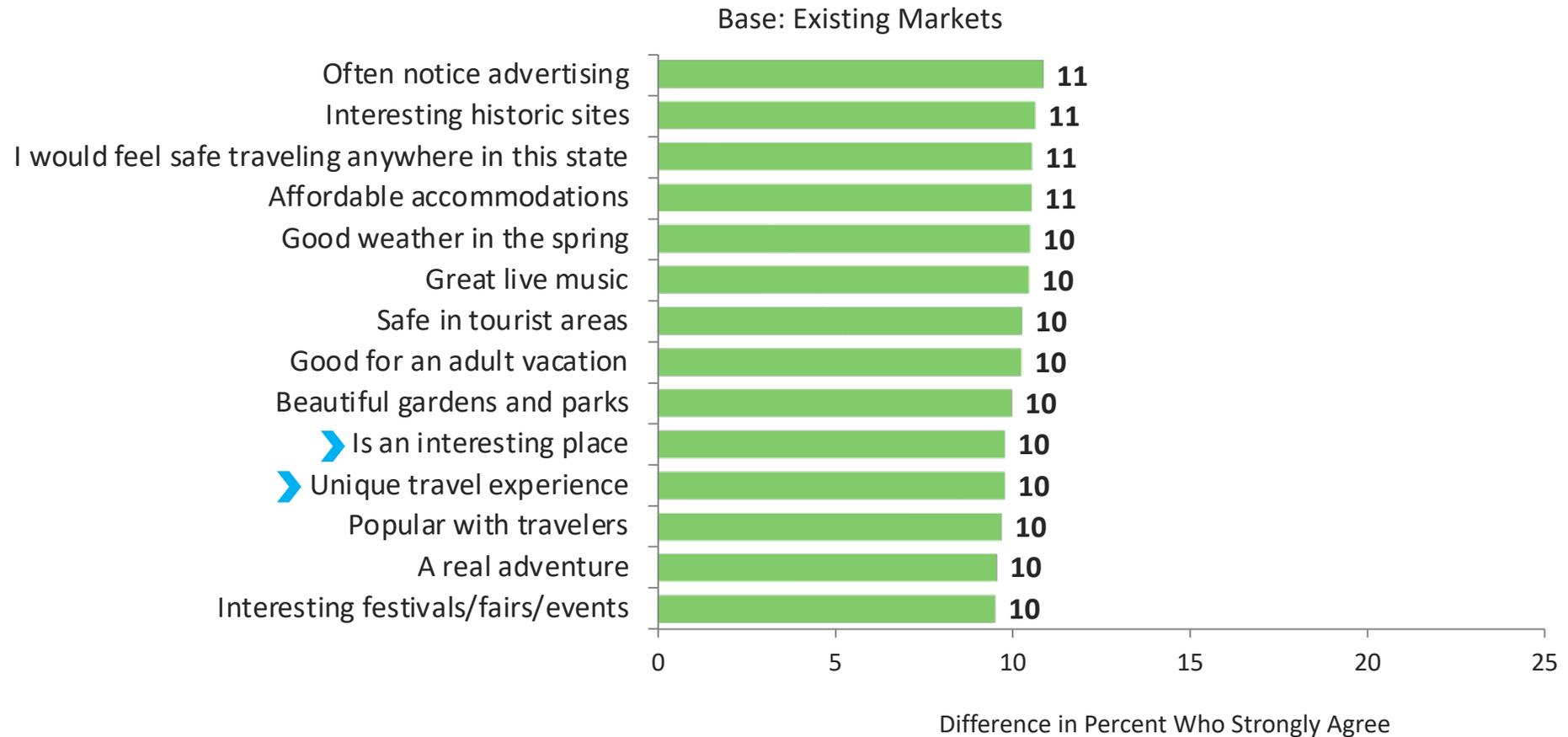
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. INDIANA**

Kentucky's Image Strengths vs. Ohio – Existing Markets



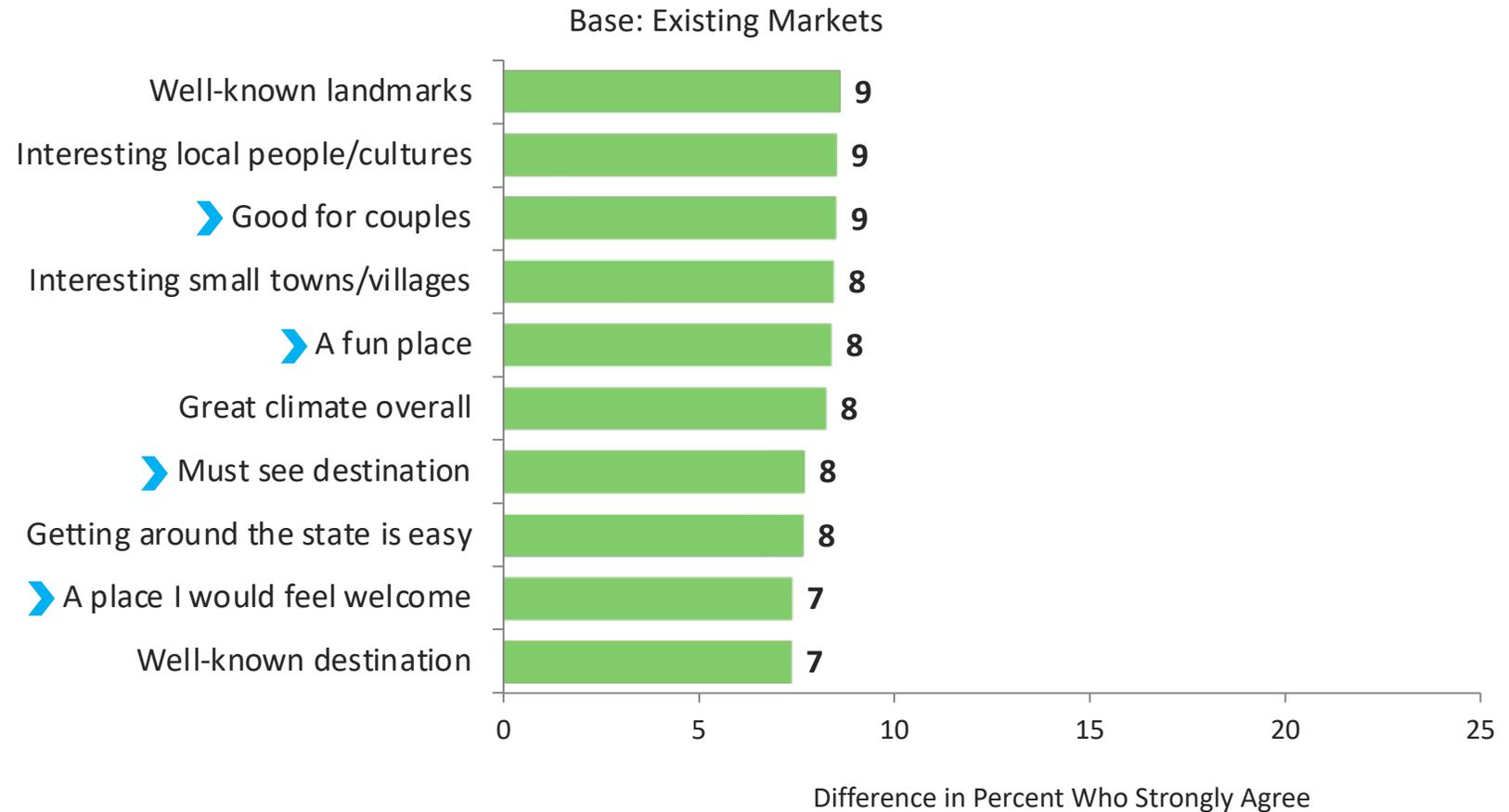
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – Existing Markets (Cont'd)



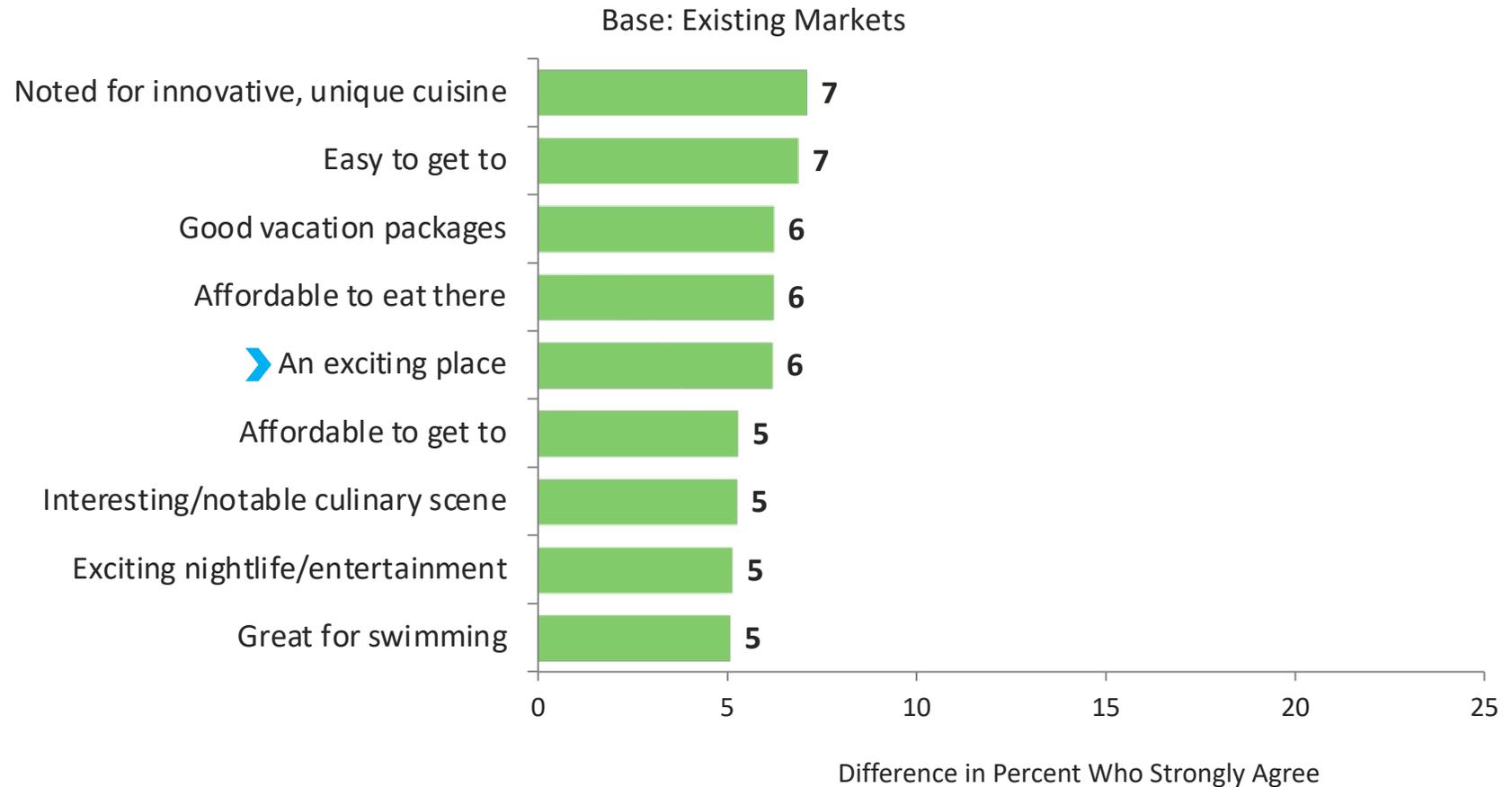
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – Existing Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Ohio – Existing Markets

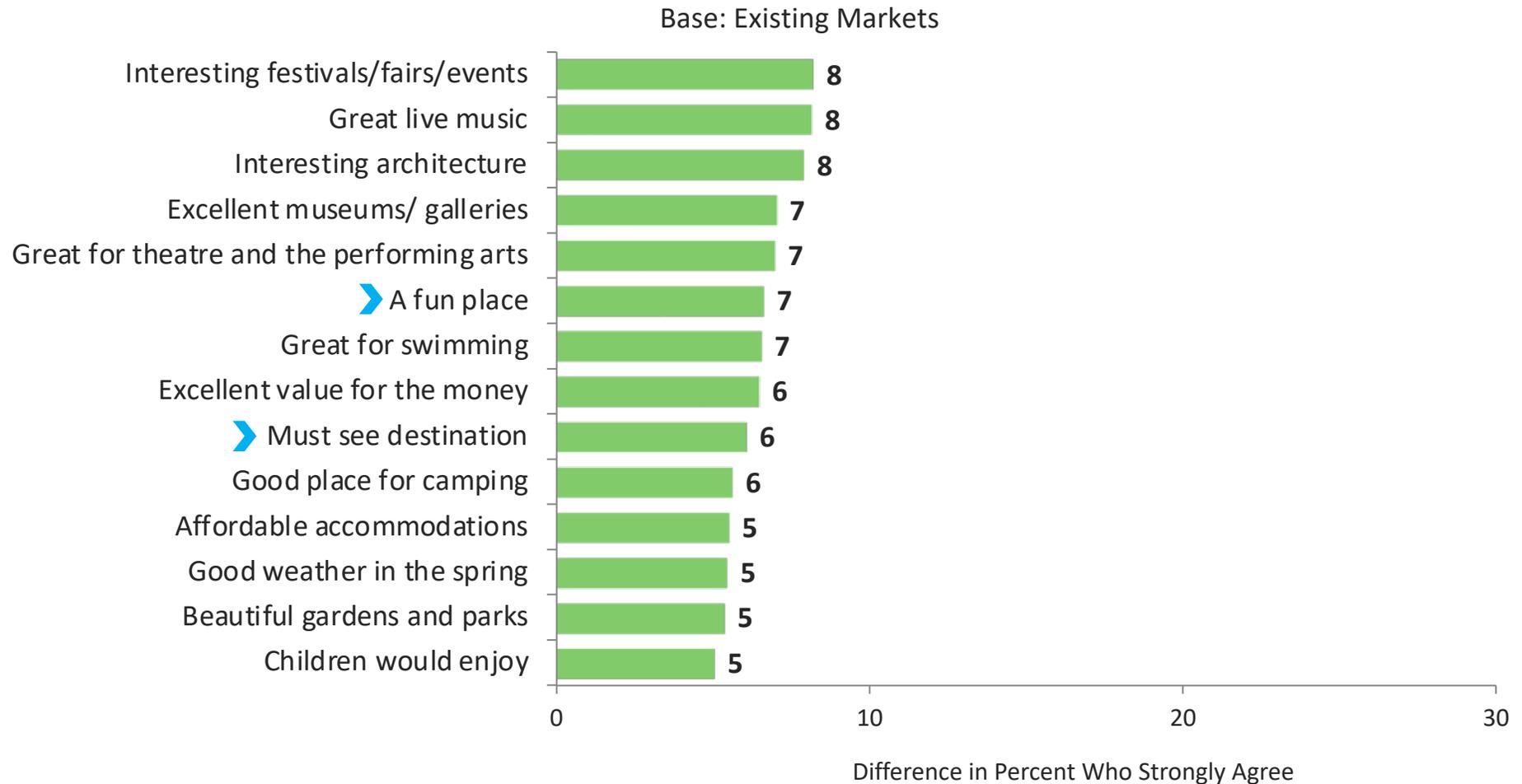
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. OHIO**

Kentucky's Image Strengths vs. West Virginia – Existing Markets

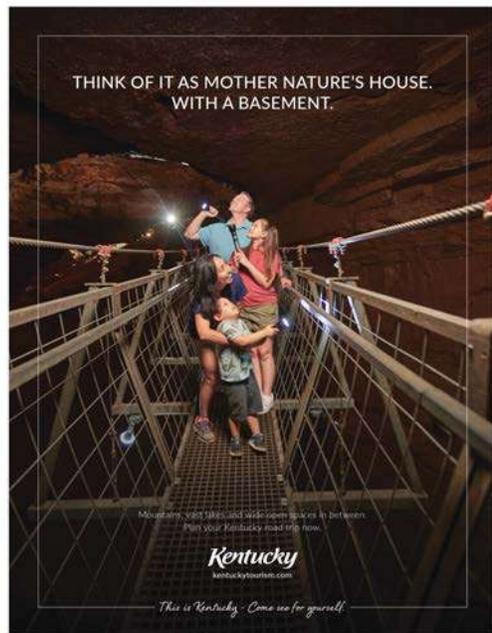


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. West Virginia – Existing Markets (Cont'd)



**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. WEST VIRGINIA**



Longwoods
INTERNATIONAL

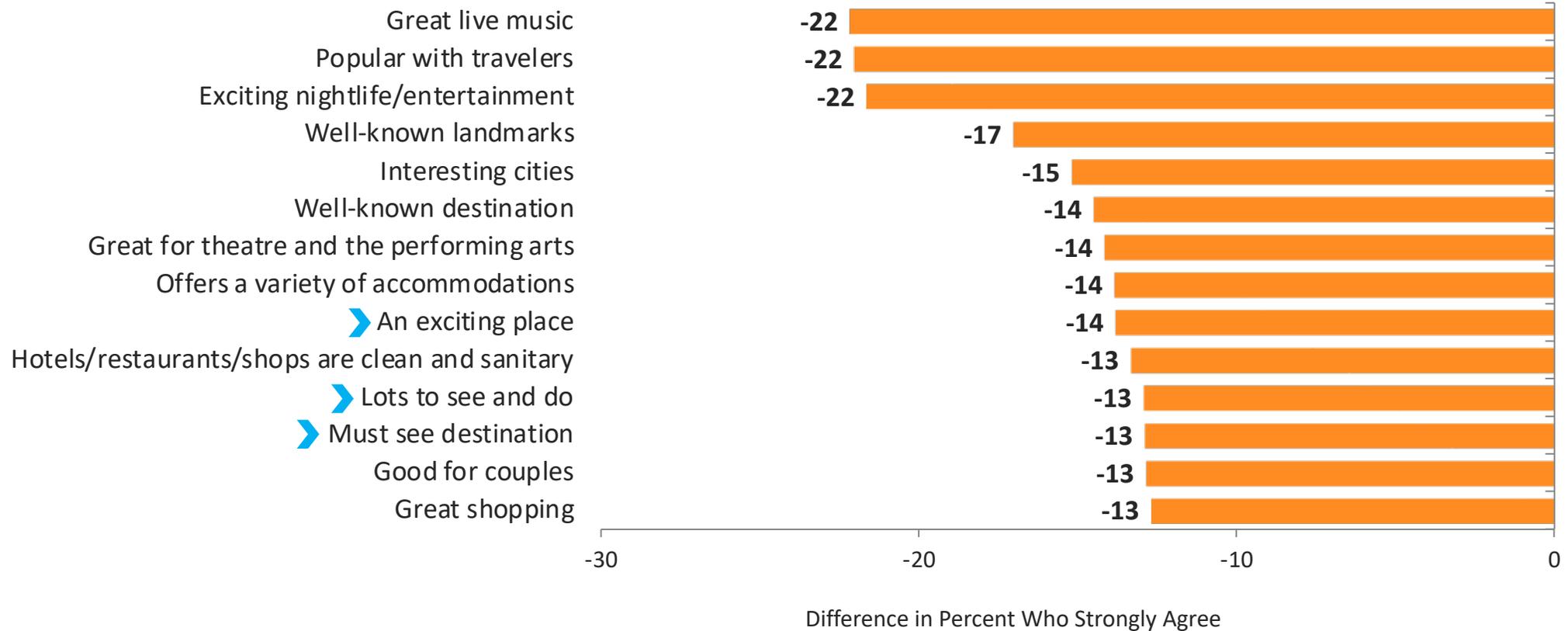
Appendix: Kentucky's Image Strengths & Weaknesses vs. Individual Competitors - New Markets

Kentucky's Image Strengths vs. Tennessee – New Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
TENNESSEE**

Kentucky's Image Weaknesses vs. Tennessee – New Markets

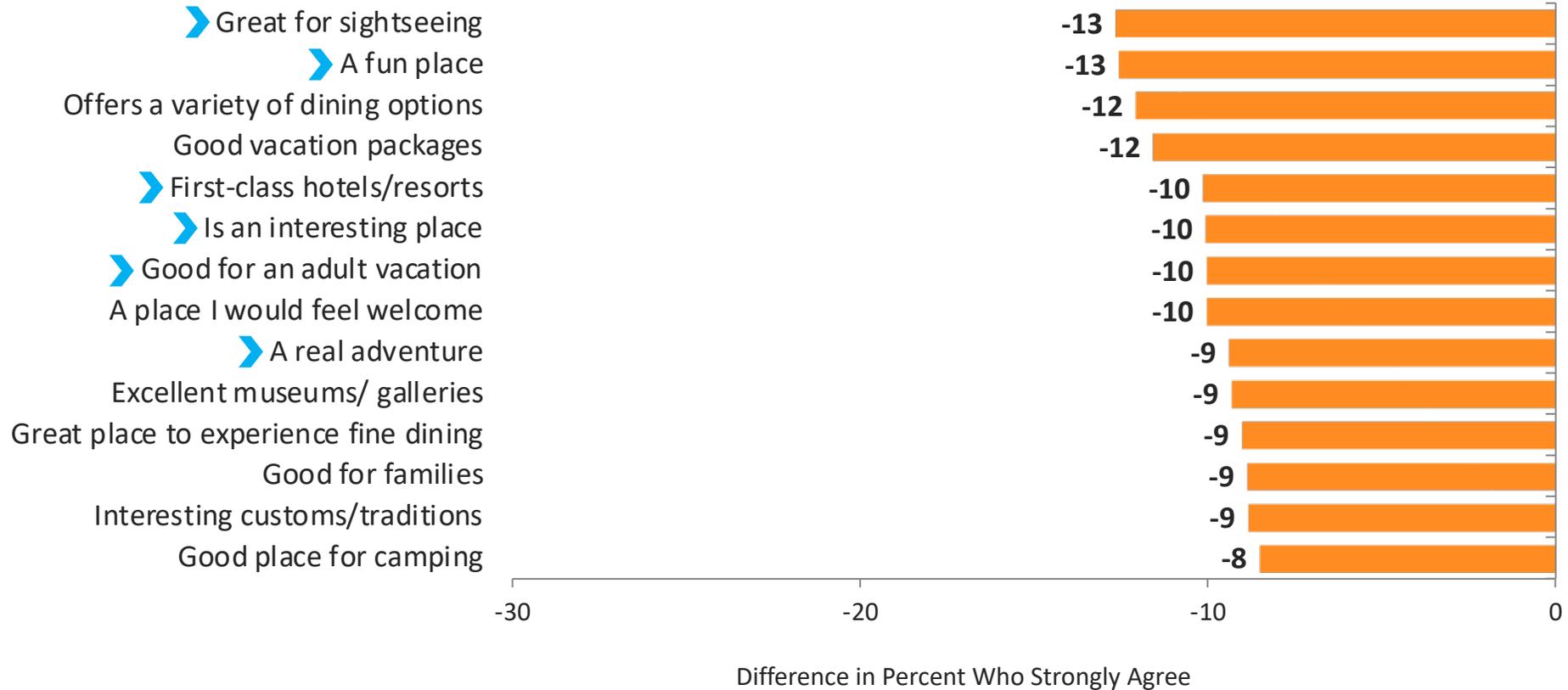
Base: New Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – New Markets (Cont'd)

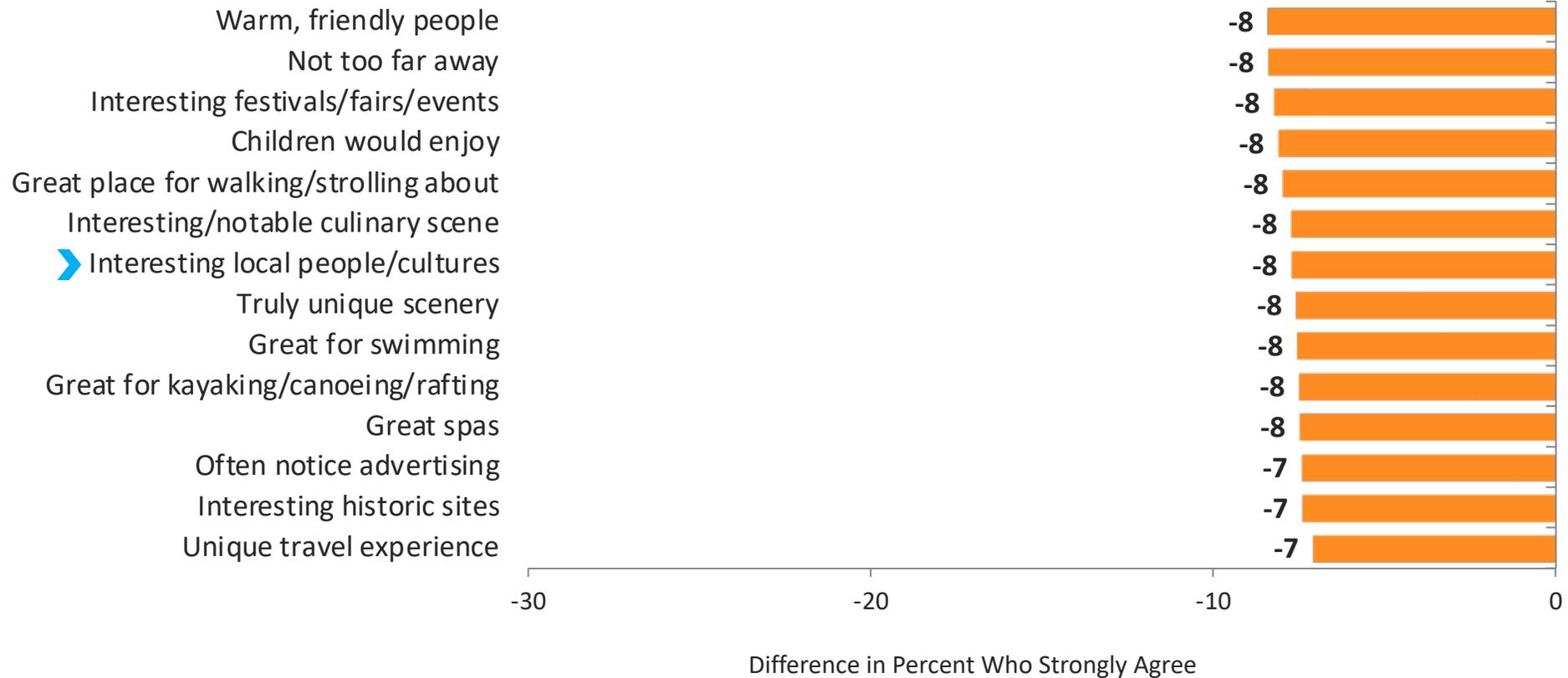
Base: New Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – New Markets (Cont'd)

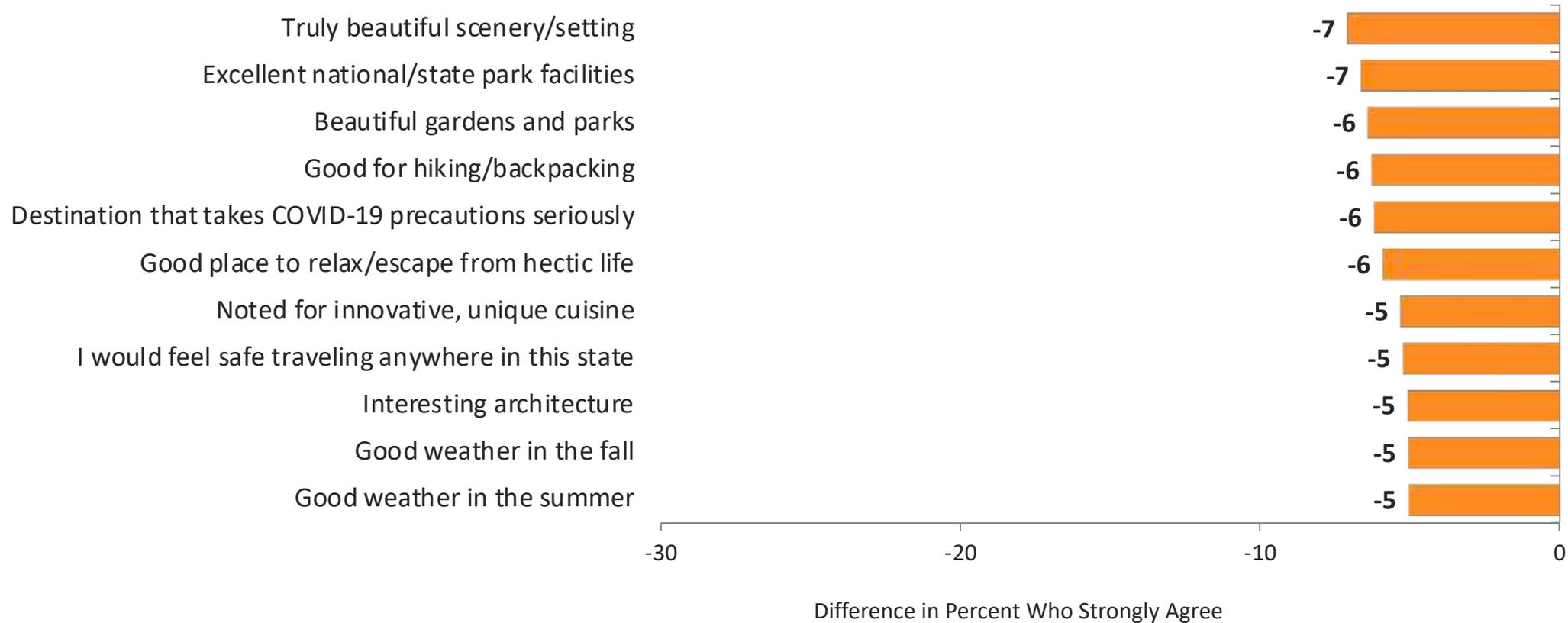
Base: New Markets



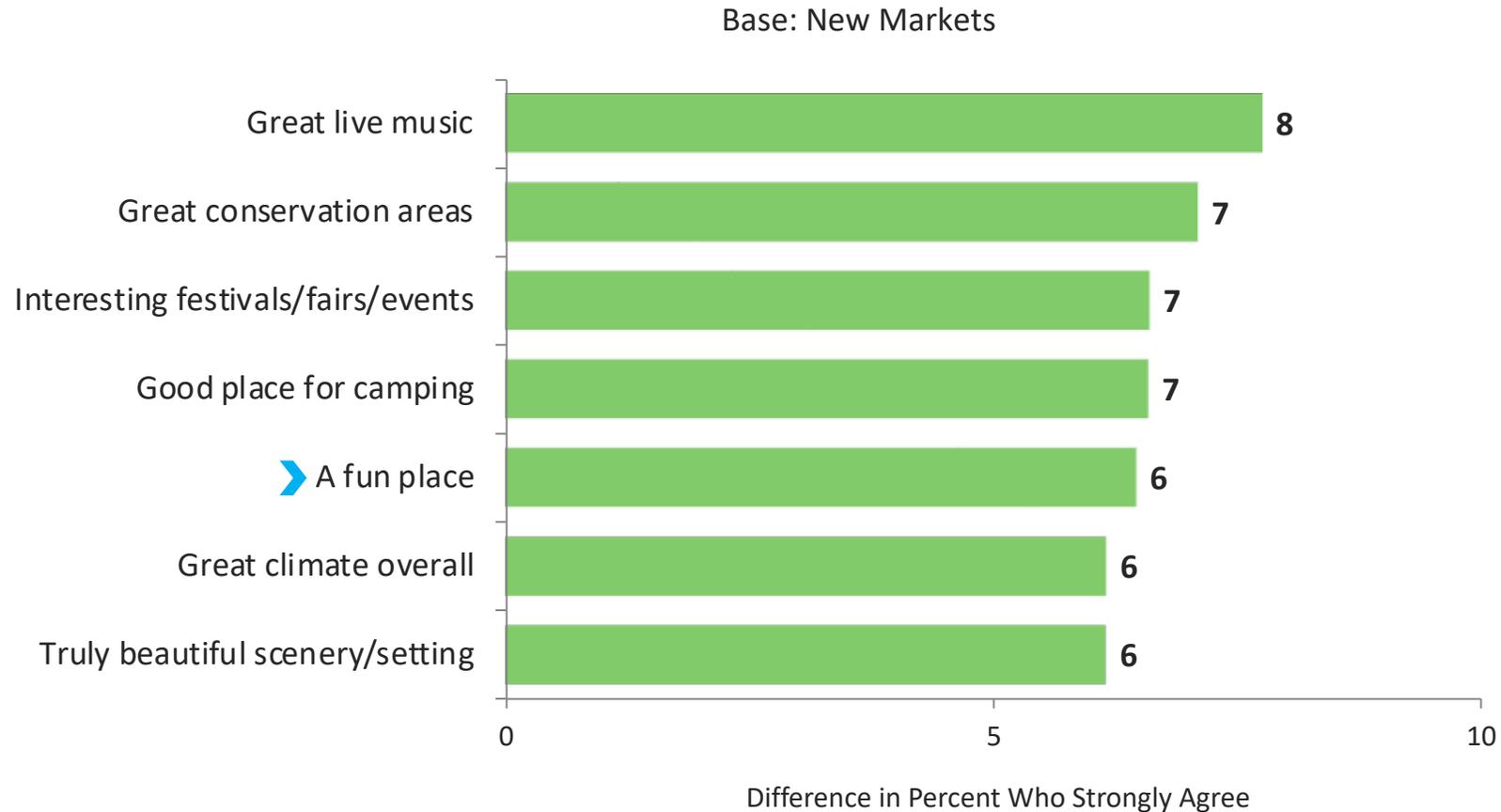
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Tennessee – New Markets (Cont'd)

Base: New Markets



Kentucky's Image Strengths vs. Missouri – New Markets

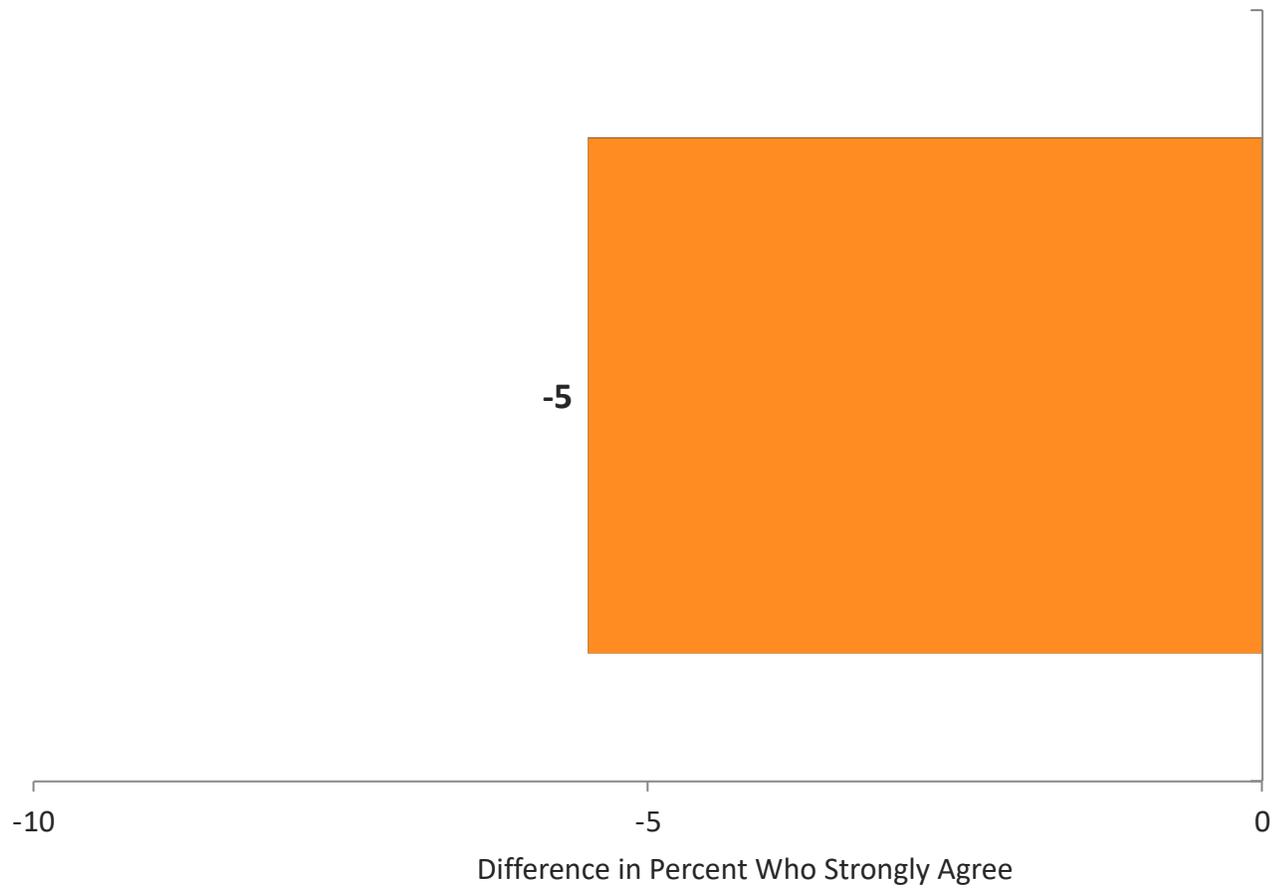


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Missouri – New Markets

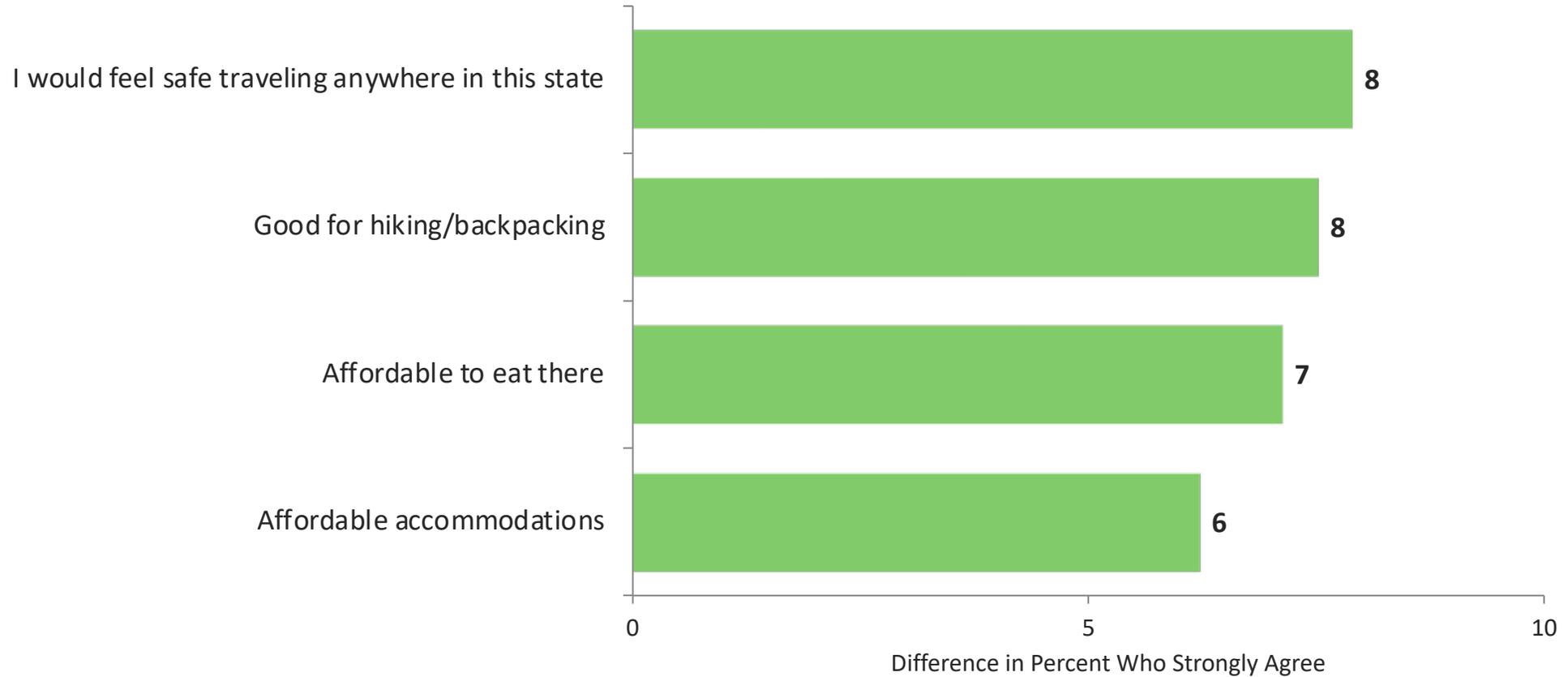
Base: New Markets

Hotels/restaurants/shops are clean and sanitary

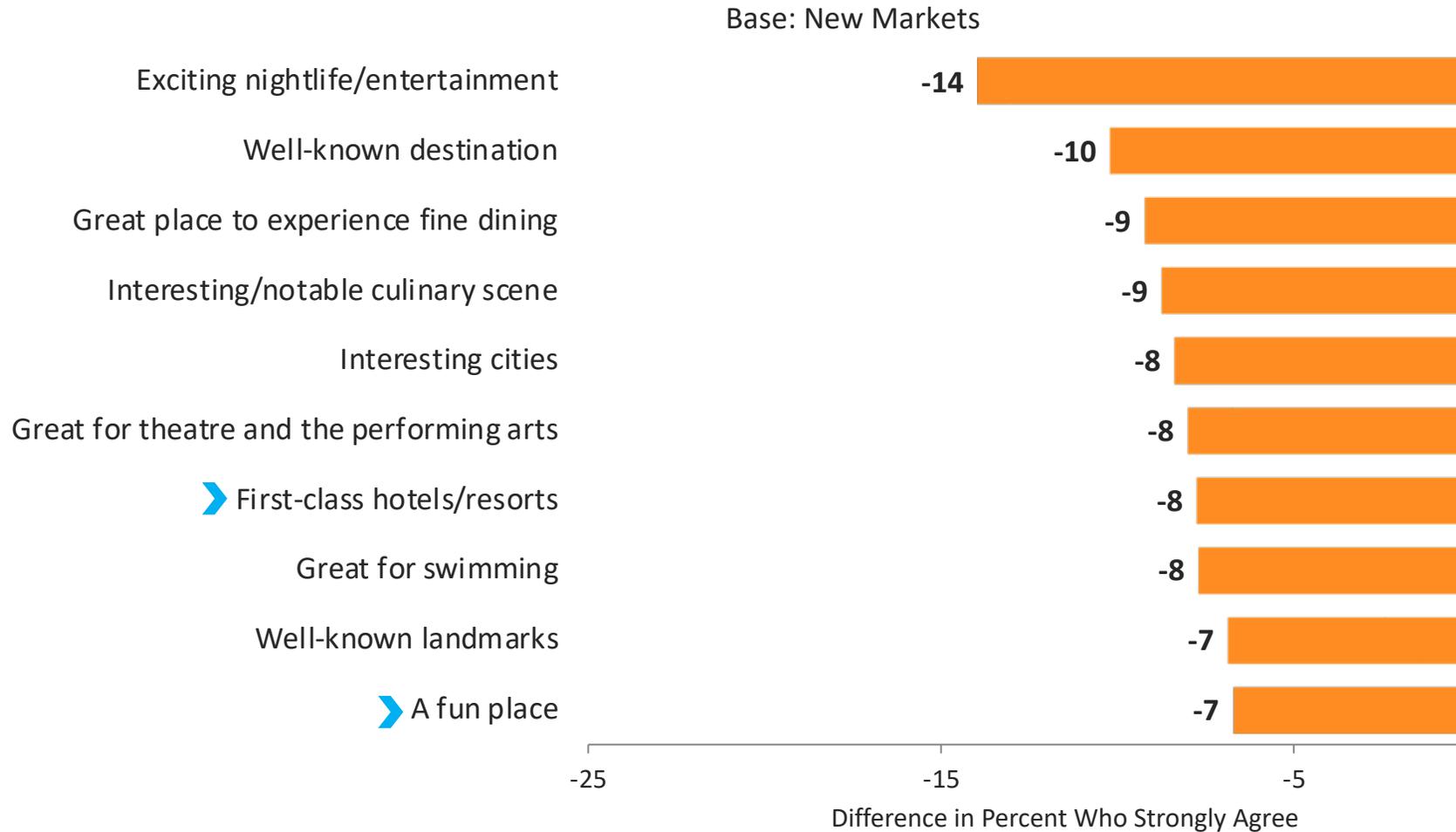


Kentucky's Image Strengths vs. Georgia – New Markets

Base: New Markets

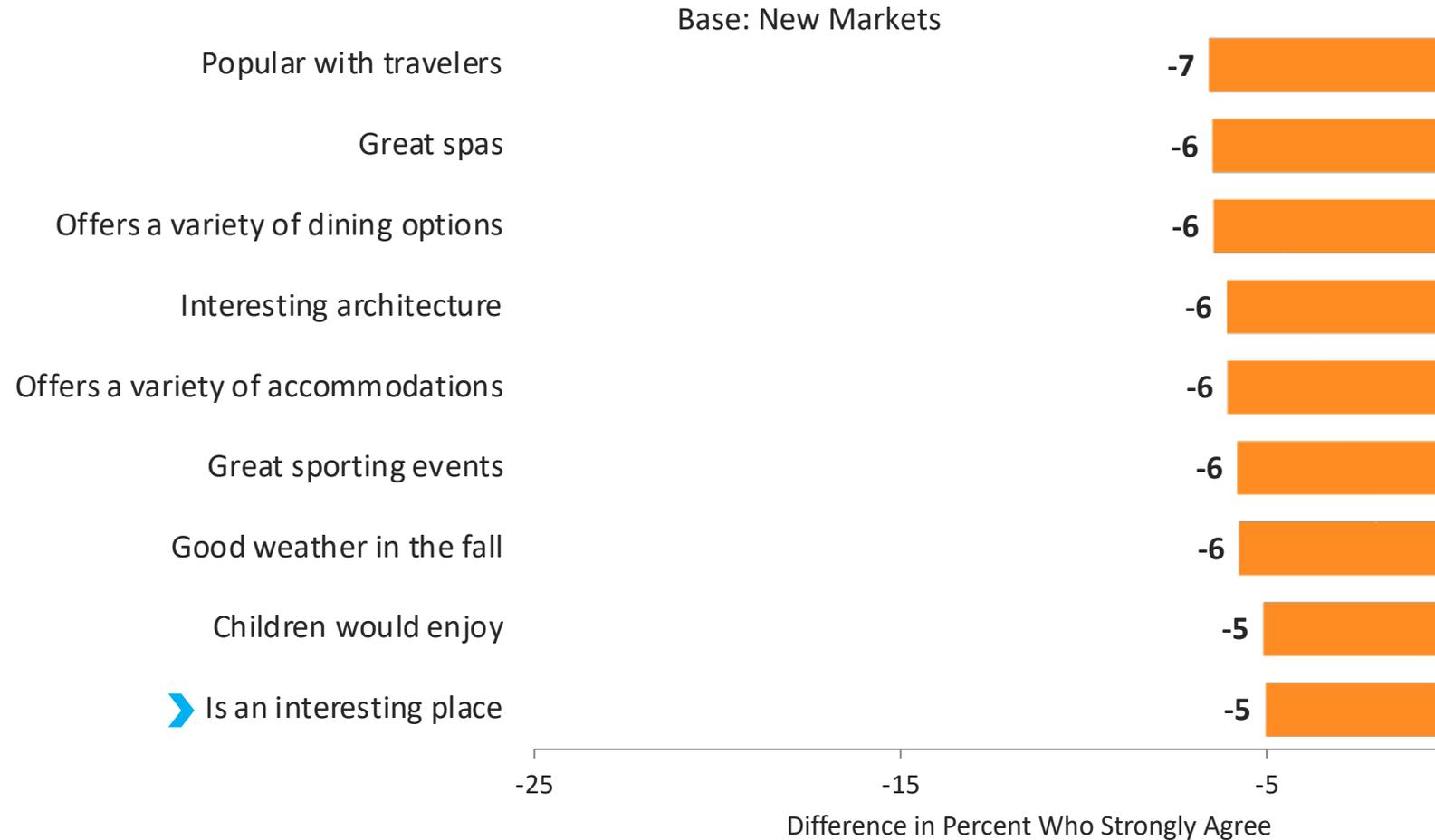


Kentucky's Image Weaknesses vs. Georgia – New Markets



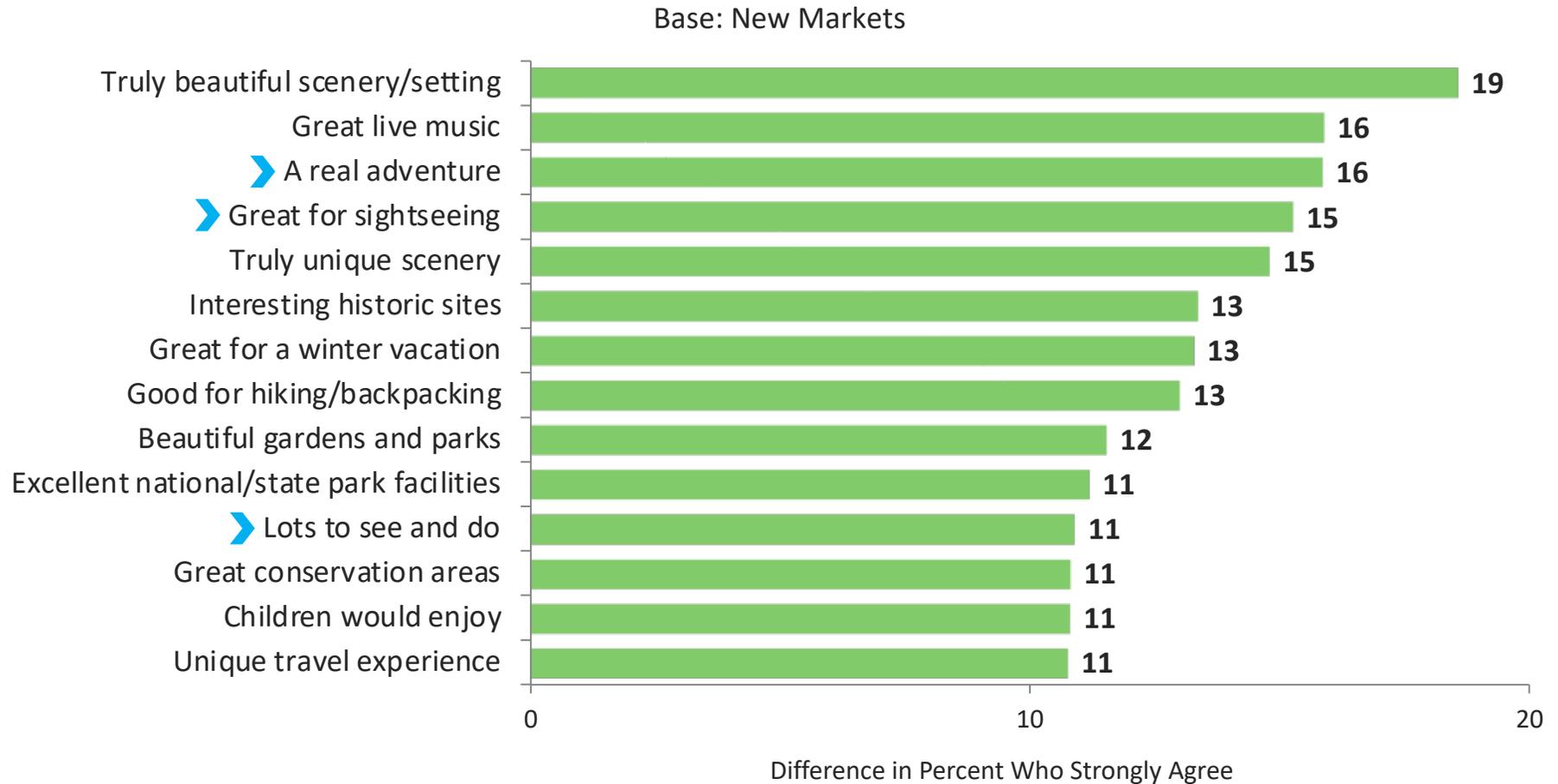
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. Georgia – New Markets (Cont'd)



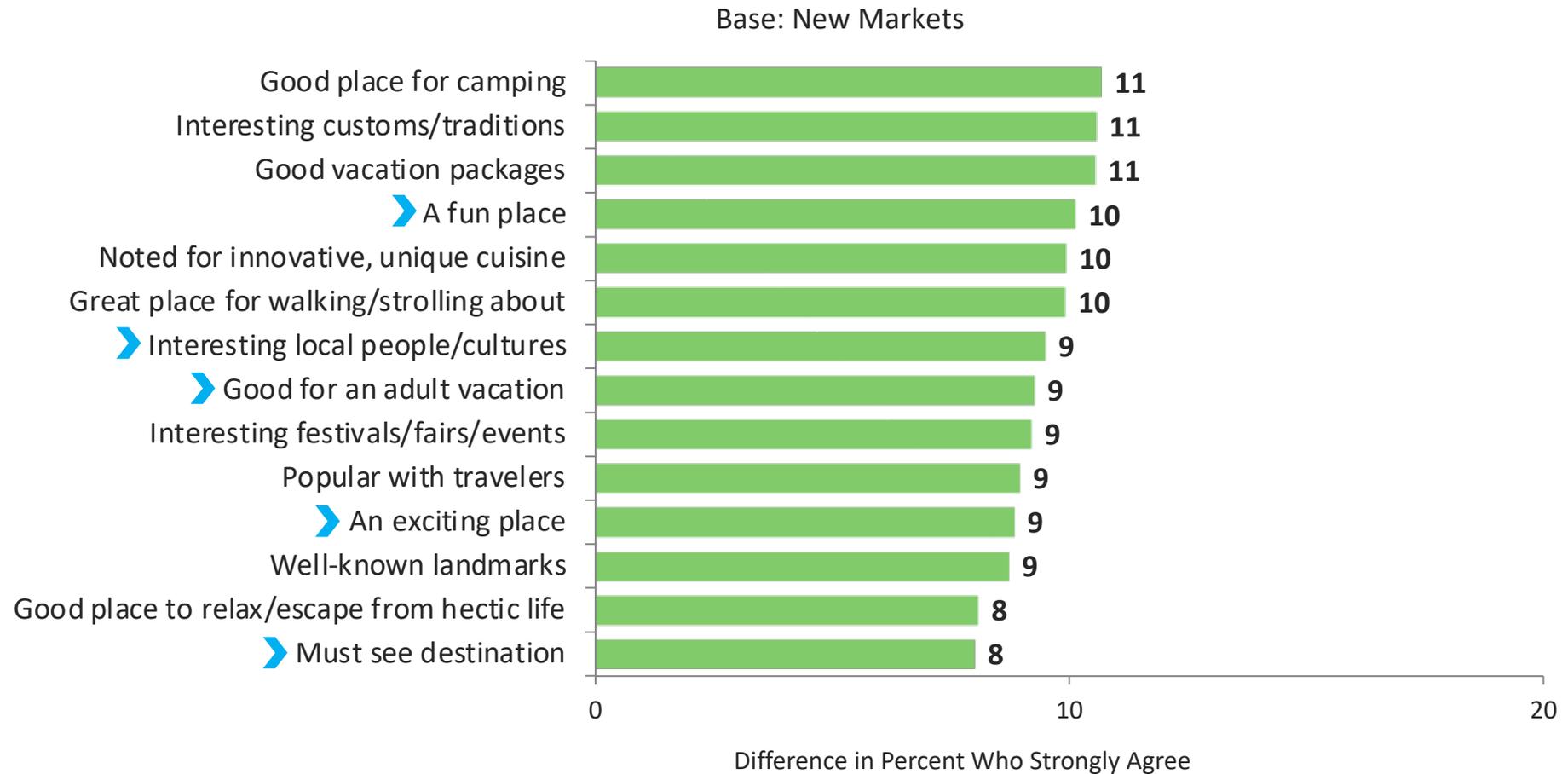
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – New Markets



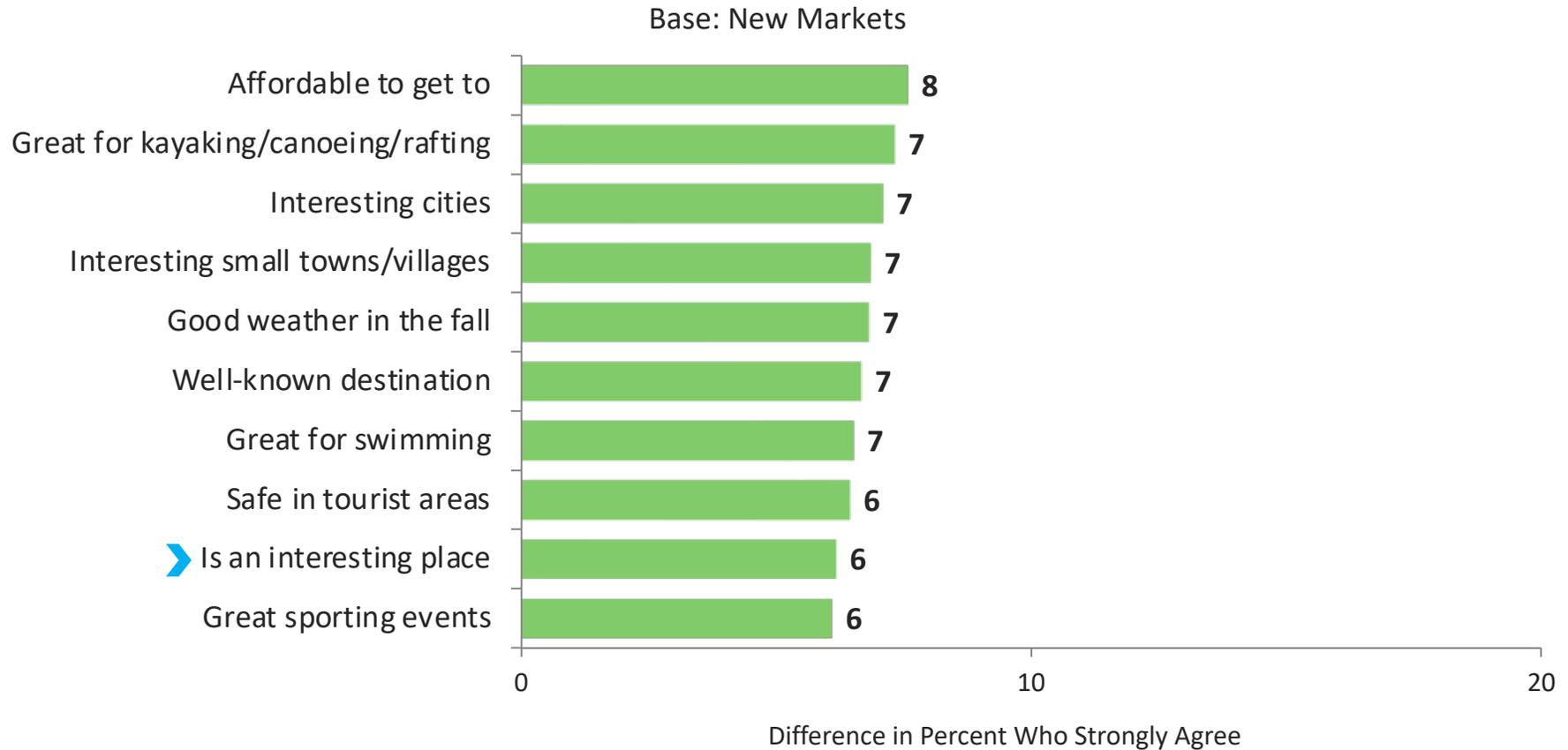
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – New Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Indiana – New Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

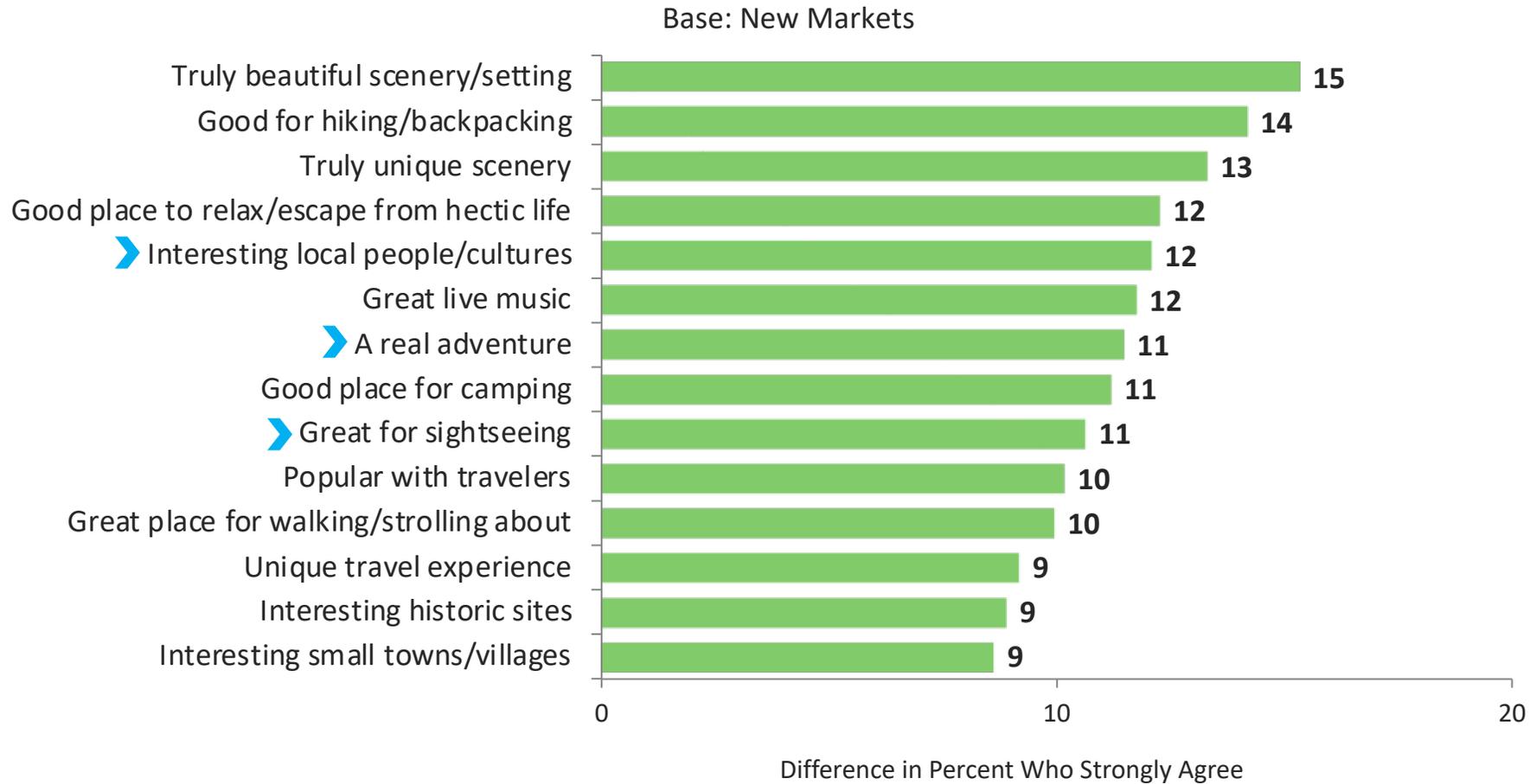
Kentucky's Image Strengths vs. Indiana – New Markets (Cont'd)



Kentucky's Image Weaknesses vs. Indiana – New Markets

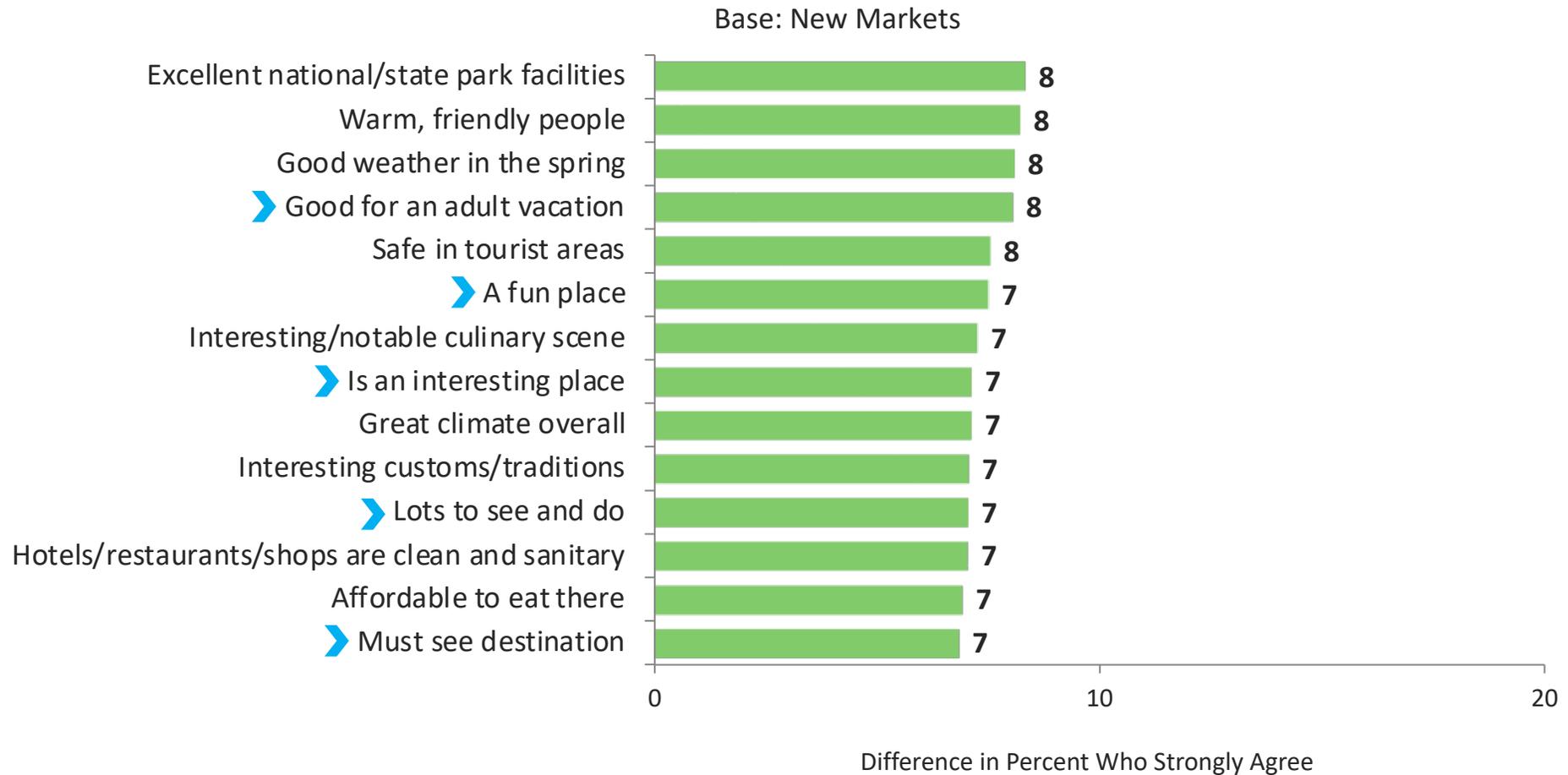
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. INDIANA**

Kentucky's Image Strengths vs. Ohio – New Markets



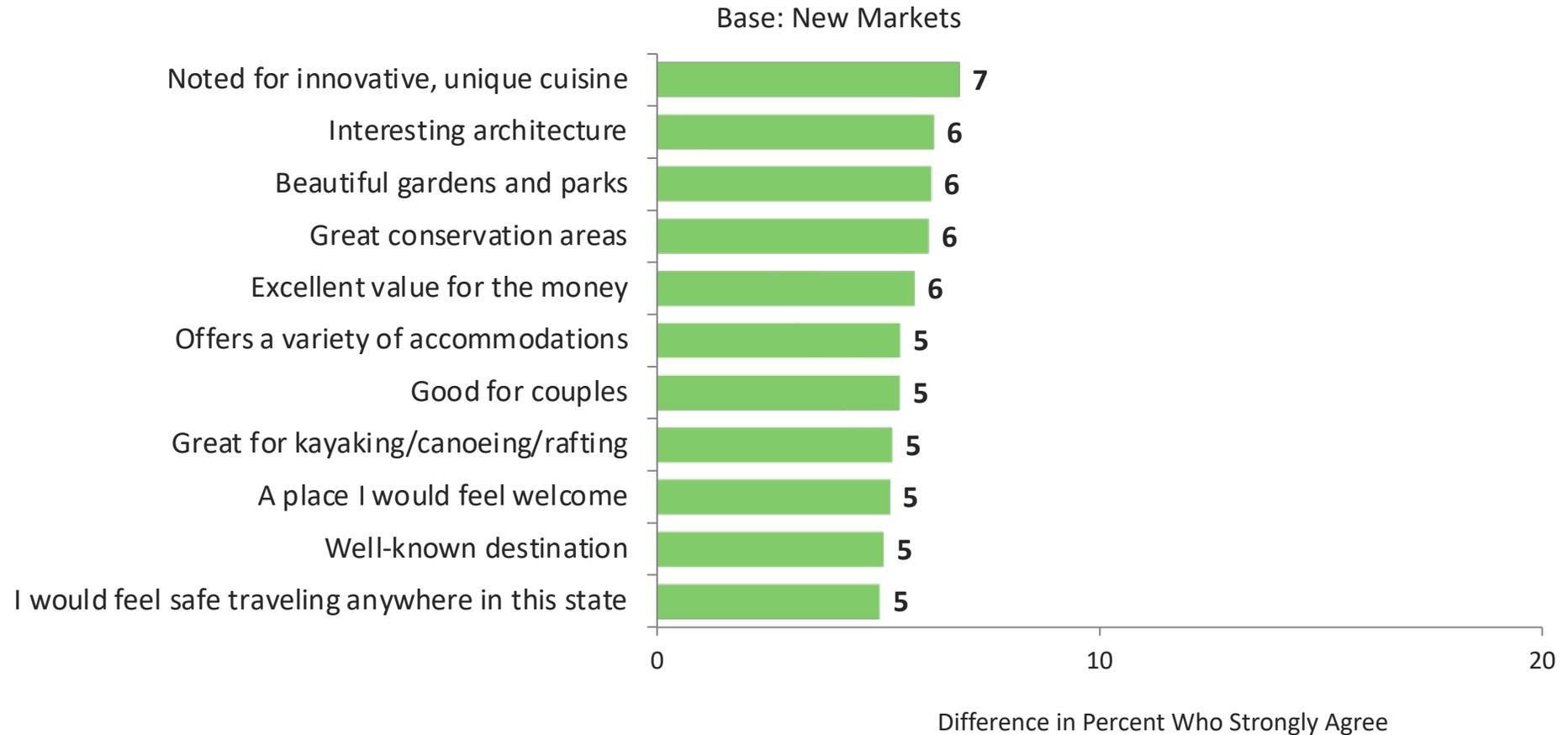
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Strengths vs. Ohio – New Markets (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

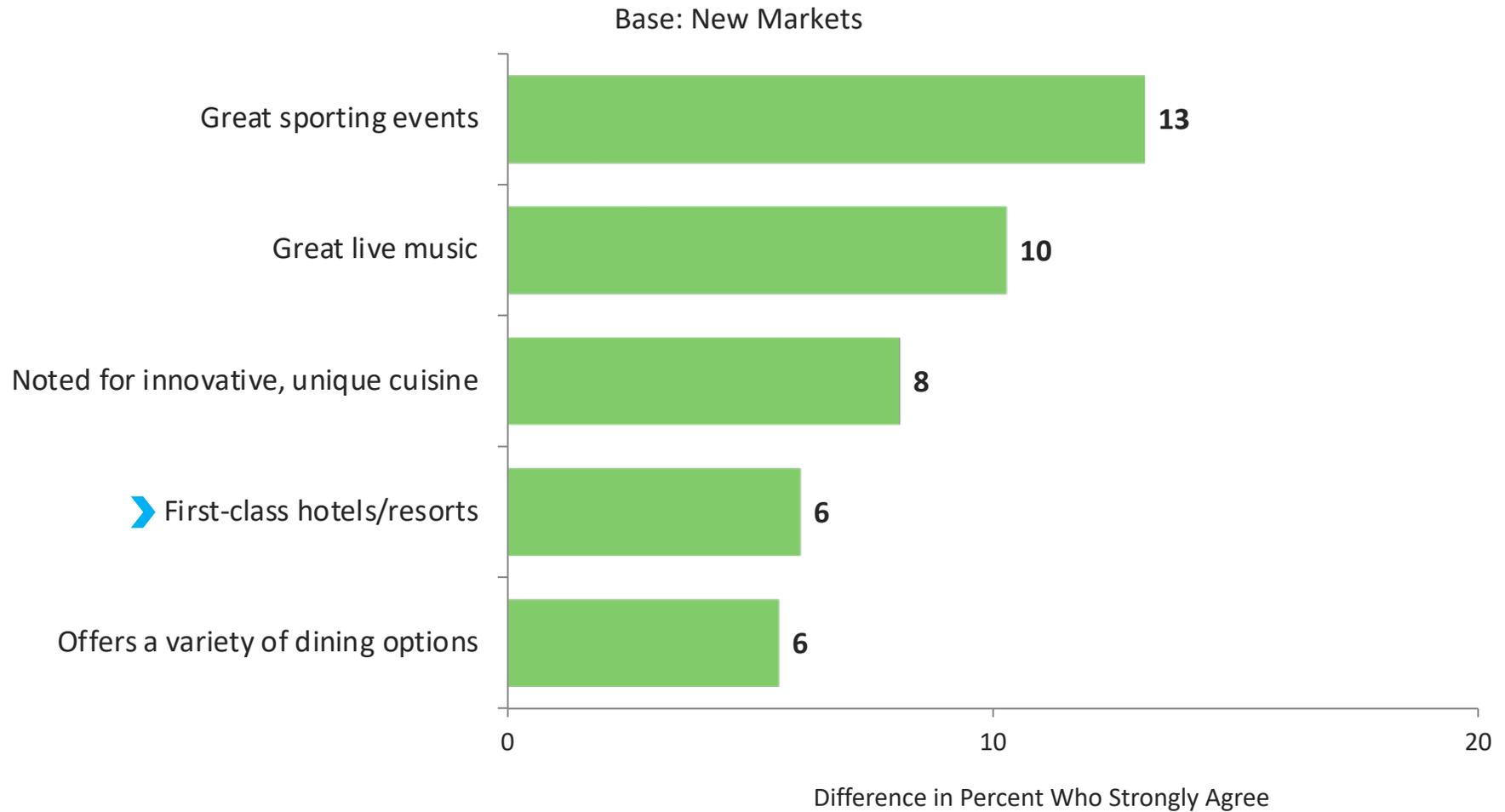
Kentucky's Image Strengths vs. Ohio – New Markets (Cont'd)



Kentucky's Image Weaknesses vs. Ohio – New Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. OHIO**

Kentucky's Image Strengths vs. West Virginia – New Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Kentucky's Image Weaknesses vs. West Virginia – New Markets

