

Kentucky 2022 Advertising ROI Research – New Markets

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Background and Purpose

- In 2022, Kentucky launched their advertising campaign in key markets.
 - The campaign consisted of both traditional and online media including:
 - Digital
 - Social
 - Print
 - Video
 - Out-of-home
 - Radio
- 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 2022 spring/summer/fall campaigns 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 1,002 respondents in the advertising markets, distributed as follows:

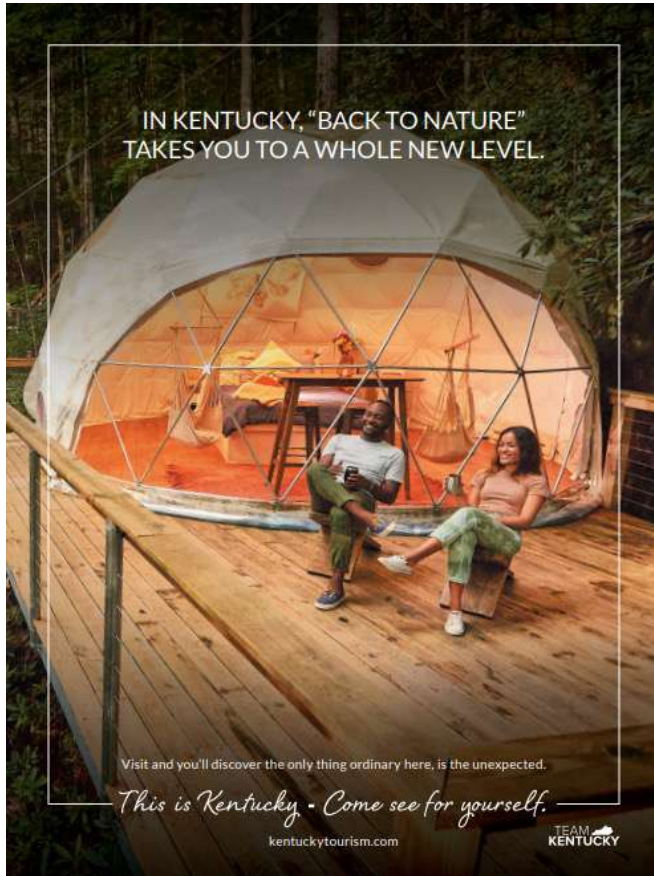
| New Markets | |
|---|------|
| DALLAS-FORT WORTH | 370 |
| DAYTON | 65 |
| ORLANDO-DAYTONA BEACH- MELBOURNE | 215 |
| WASHINGTON, DC (HAGERSTOWN) | 352 |
| Total | 1002 |

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 18 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 2023
- 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=1,002 travelers).



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Conclusions and Recommendations

Key Findings

- Over half of travelers in Kentucky's new advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. This is significantly higher than 2021's 39%.
- Among new market travelers, there's only a 13-point difference between the media type with the highest and lowest awareness. Four in ten new market travelers recalled at least one video ad, a third recalled at least one print ad, and three in ten recalled at least one digital or social ad. A quarter recalled at least one radio or OOH ad.
- Over one in ten were aware of the Kentucky Tourism website, with seven in ten of those travelers finding it very helpful.
- Focusing on these new markets, the campaigns included in this study produced an additional 0.4 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising. These incremental Kentucky visitors spent \$76.5 million on those trips. When related to advertising costs of \$1.6 million, this translates into a return on investment of \$49 in visitor spending for each ad dollar spent.
- KDT spent \$3.61 for every incremental trip taken originating from the new markets.
- Those incremental expenditures in new advertising markets yielded \$5.8 million in state and county taxes. There was a return on investment of \$4 in taxes for each ad dollar spent.

Key Findings (Cont'd)

- 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 – 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.
 - A great family atmosphere – good destination for families that children would enjoy visiting.
- The Hot Buttons, or ten individual Image attributes most closely tied to destination selection in Kentucky's new markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; popular with travelers; a real adventure; children would enjoy; interesting cities; and good for families.
- The campaign had a positive impact on travelers' perceptions of Kentucky. The campaign did an exceptional job of improving people's perceptions of Kentucky for every image dimension evaluated. For the new advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study. 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 from the state's new markets positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study. Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

Key Findings (Cont'd)

- Three in ten travelers within the new advertising markets have visited Kentucky during their lifetimes, over one in ten have visited Kentucky during the past 2 years, and a third of travelers within the new advertising markets intend to visit Kentucky during the next 12 months.
- Among travelers who visited Kentucky overnight, the two most popular activities were shopping and trying unique/local foods.
- 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. It's strongest competition is North Carolina, Tennessee, and Georgia.
- 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 new 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.



Main Findings: Advertising Impacts



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Advertising
Awareness

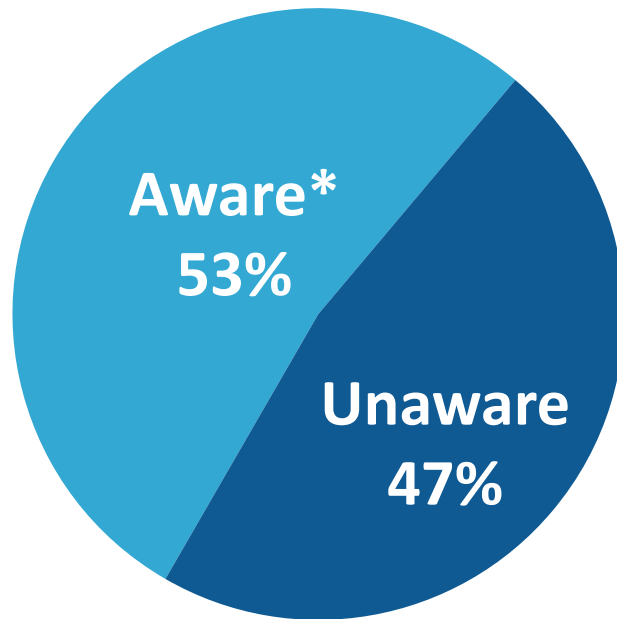
Advertising Awareness

- Over half (53%) of travelers in Kentucky's new advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. This is significantly higher than 2021's 39%.
- Among new market travelers, there's only a 13-point difference between the media type with the highest and lowest awareness. Four in ten new market travelers recalled at least one video ad (38%), a third recalled at least one print ad (34%), and three in ten recalled at least one digital (30%) or social (28%) ad. A quarter recalled at least one radio (27%) or OOH (25%) ad.
- Over one in ten (14%) were aware of the Kentucky Tourism website, with seven in ten (71%) of those travelers finding it very helpful.
- A third (33%) of travelers in Kentucky's new markets conducted an internet search to obtain more information about traveling to Kentucky, and two in ten visited www.KentuckyTourism.com (21%) or researched the state on social media (18%).

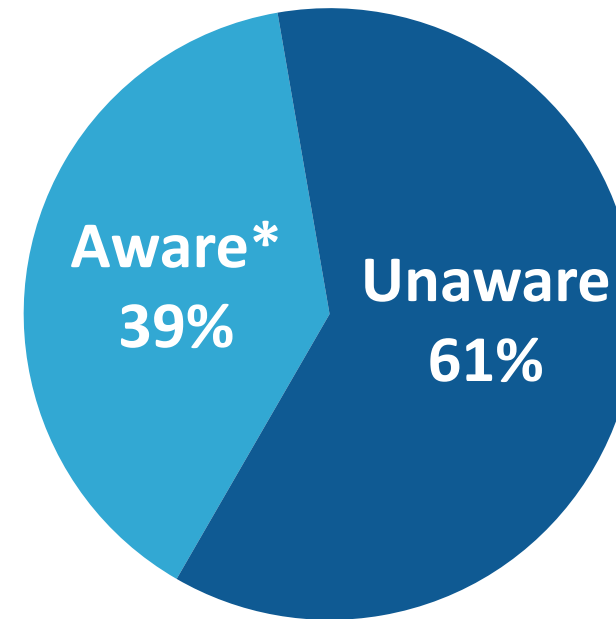
Awareness of the Ad Campaign – New Markets 2022 vs. 2021

Base: New Markets

2022



2021**

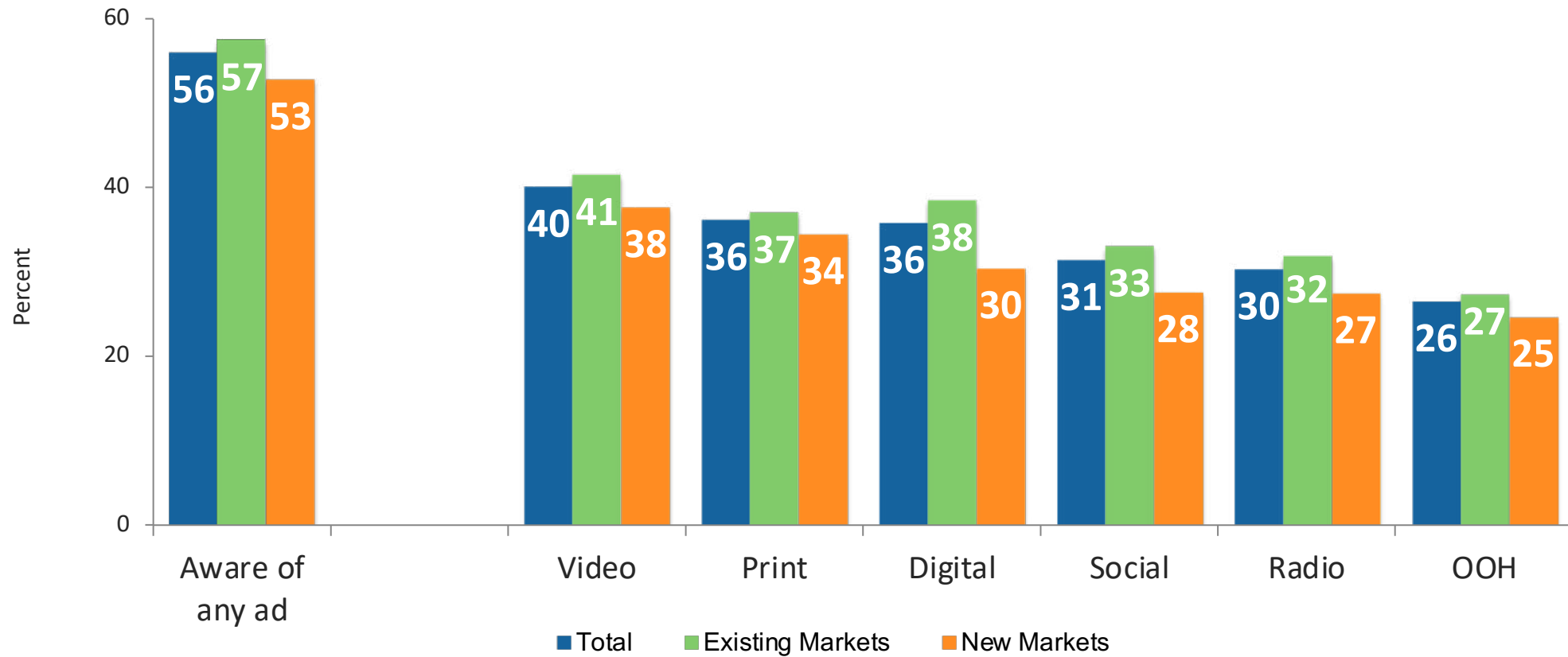


*Saw at least one ad

**New Market DMAs 2021: Greenville/Spartanburg; Dallas/Fort Worth; Philadelphia; Orlando/Daytona Beach/Melbourne; Charlotte; Detroit; Washington DC; Milwaukee; Minneapolis/St. Paul; Dayton; Charleston/Huntington (non-KY counties); Grand Rapids/Kalamazoo/Battle Creek

Advertising Awareness* by Medium

Base: Residents of Kentucky's Advertising Markets

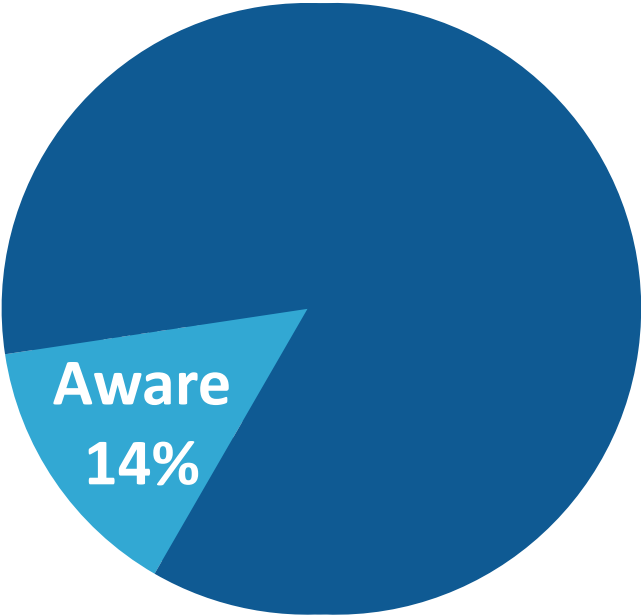


*Saw at least one ad and based on markets where shown

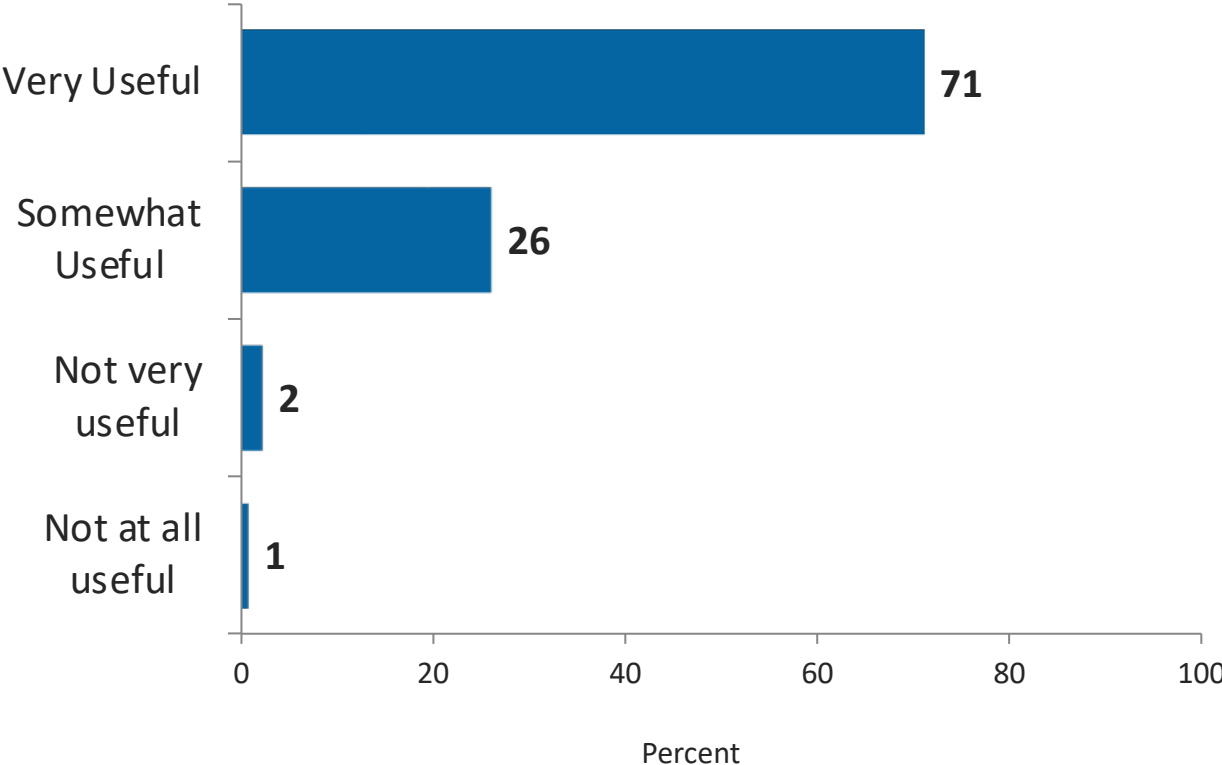
Kentucky Tourism Website

Base: New Markets

Awareness of Website

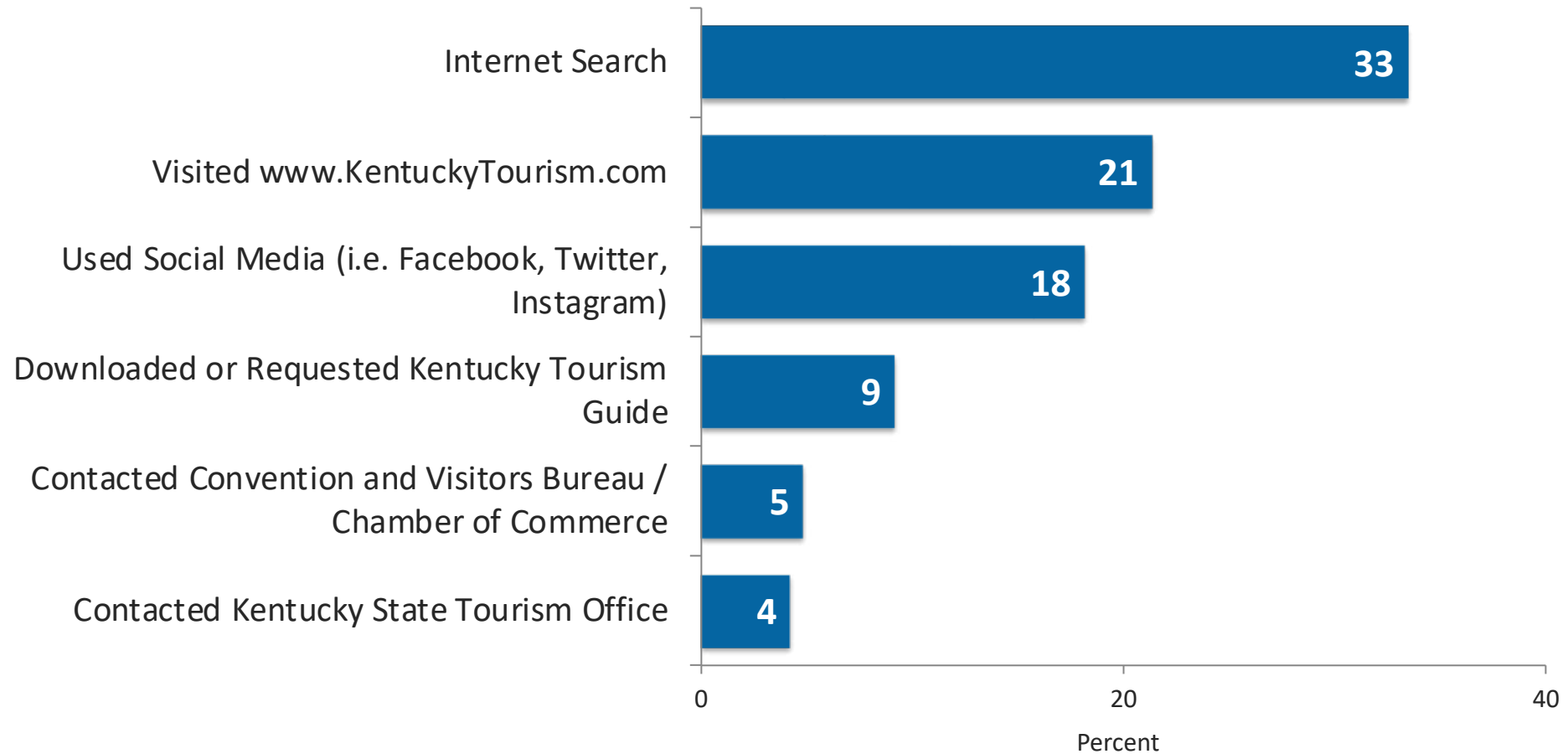


How useful was the Kentucky Tourism website?



Actions Taken to Obtain Information about Traveling to Kentucky

Base: New Markets





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**Short Term
Conversion**

Short-Term Conversion

- Focusing on these new markets, the campaigns included in this study produced an additional 0.4 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$76.5 million on those trips. When related to advertising costs of \$1.6 million, this translates into a return on investment of \$49 in visitor spending for each ad dollar spent.
- KDT spent \$3.61 for every incremental trip taken originating from the new markets.
- Those incremental expenditures in new advertising markets yielded \$5.8 million in state and county taxes. There was a return on investment of \$4 in taxes for each ad dollar spent.

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

**Ad Investment
\$1.6M**



0.4M

**Incremental
Trips**

\$76.5M

**Incremental Visitor
Spending**

\$5.8M*

**Incremental
State + Local Taxes**

*Effective Direct Tax rate 7.6% (from Tourism Economics)

Campaign Efficiency

| | New Markets |
|------------------|-------------|
| Ad \$'s per Trip | \$3.61 |
| Trips per Ad \$ | 0.28 |

The Bottom Line in 2022 – New Markets



Every \$1 invested in the 2022 Kentucky advertising campaign generated \$49 in direct visitor spending and \$4 in taxes in the state

The Bottom Line –New Markets

New Markets

| | 2021 | 2022* |
|--------------|-------|-------|
| Spending ROI | \$101 | \$49 |
| Tax ROI | \$8 | \$4 |

**2022 New Markets: Compared to 2021, fielding this study in fewer markets resulted in a 69% decline in the number of new market travelers potentially exposed to the campaign.*



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



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Destination Hot Buttons

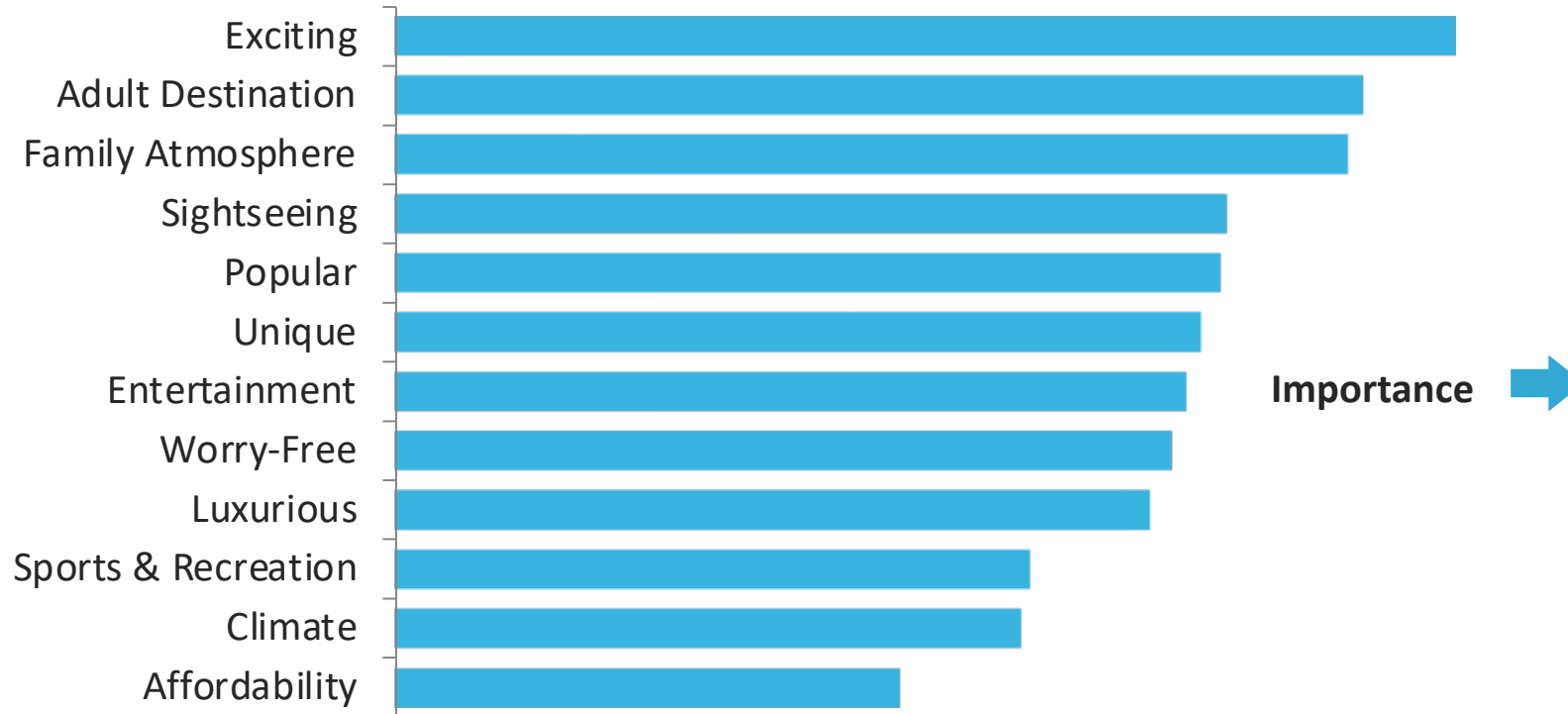
Travel Motivators

- 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** – 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.
 - A great **family atmosphere** – good destination for families that children would enjoy visiting.
- 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:
 - Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, parks, museums, etc.
 - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising for this destination?
 - **Uniqueness**, including the scenery, culinary scene, people, and distilleries.
 - The opportunities for **entertainment**, e.g., fairs, live music, nightlife, theater etc.
 - A safe, welcoming and **worry-free** environment.
 - The availability of **luxurious** accommodations, dining, and spas.

Travel Motivators

- Lower priorities are:
 - **Sports and recreation**, including bicycling, hiking, water sports such as swimming and kayaking/rafting, and other outdoor recreation.
 - **Climate.**
 - **Affordability.**
- The Hot Buttons, or ten individual Image attributes most closely tied to destination selection in Kentucky's new markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; popular with travelers; a real adventure; children would enjoy; interesting cities; and good for families.

Travel Motivators



*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

Hot Buttons

A fun place

Must see destination

Is an interesting place

An exciting place

Good for couples

Popular with travelers

A real adventure

Children would enjoy

Interesting cities

Good for families

KY **Kentucky Tourism** Sponsored · 🌐

Explore Kentucky's charming horse country with a tour that gets you up close and personal with these majestic champions.



Explore Kentucky's Horse Country!

👍❤️😬 Brenda ... 113 Comments 157 Shares

👍 Like 💬 Comment ➦ Share

KY **Kentucky Tourism** Sponsored · 🌐

Visit the museums, listen to the music, and explore the great outdoors. There's so much to love about Kentucky.



kentuckytourism.com
Come see Kentucky for yourself [Learn more](#)

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Advertising Impact on Short-of-Sales Measures

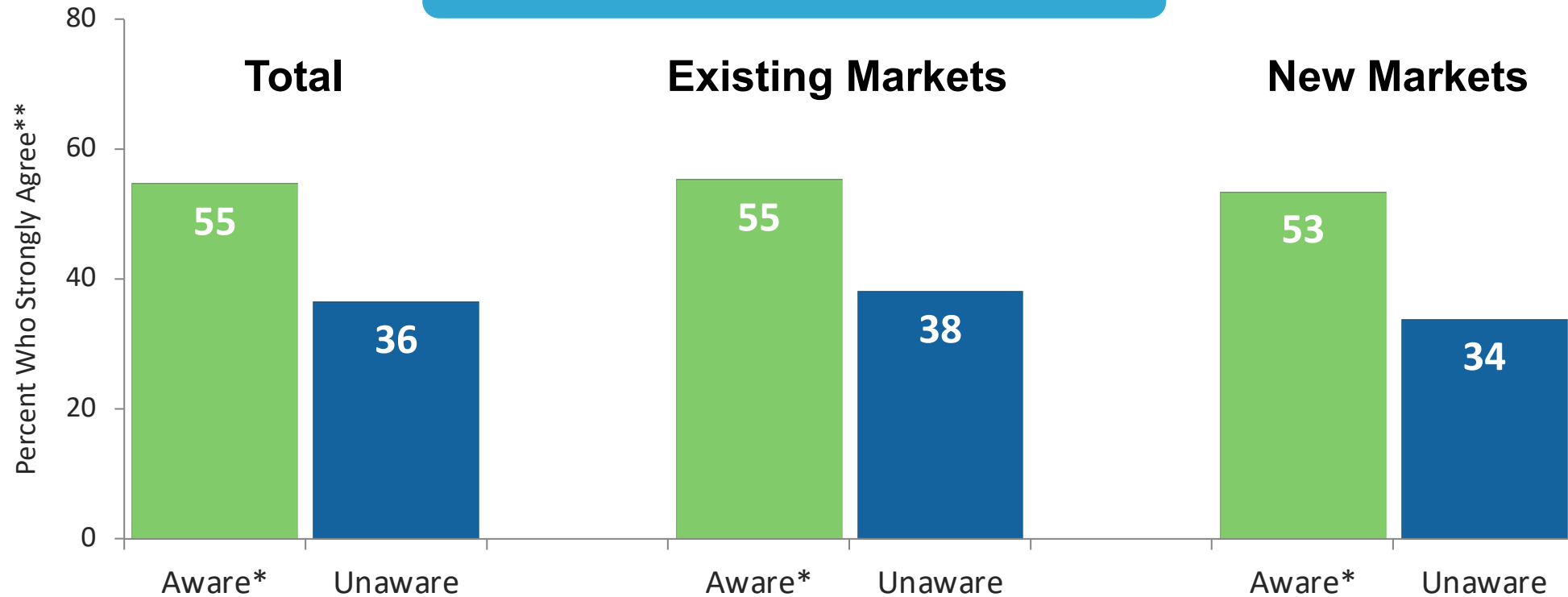
Advertising Impacts

- The campaign had a positive impact on travelers' perceptions of Kentucky:
 - Travelers in Kentucky's new advertising markets 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 an exceptional job of improving people's perceptions of Kentucky for every image dimension evaluated.
 - 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 20 point or more lift: a fun place; a real adventure; an exciting place; and interesting cities.
 - 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.

Advertising Impact on Kentucky's Overall Image

Base: Based on markets where shown

“A place I'd really enjoy visiting”



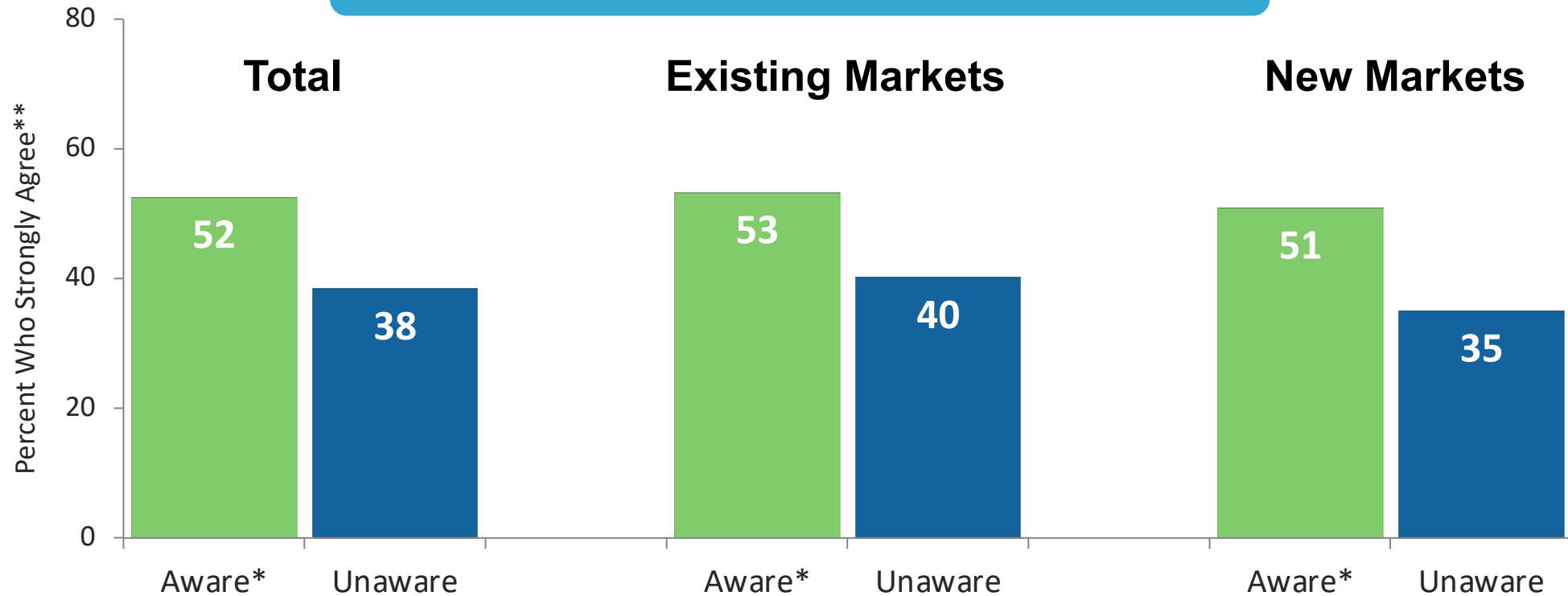
*Saw at least one ad

**“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”

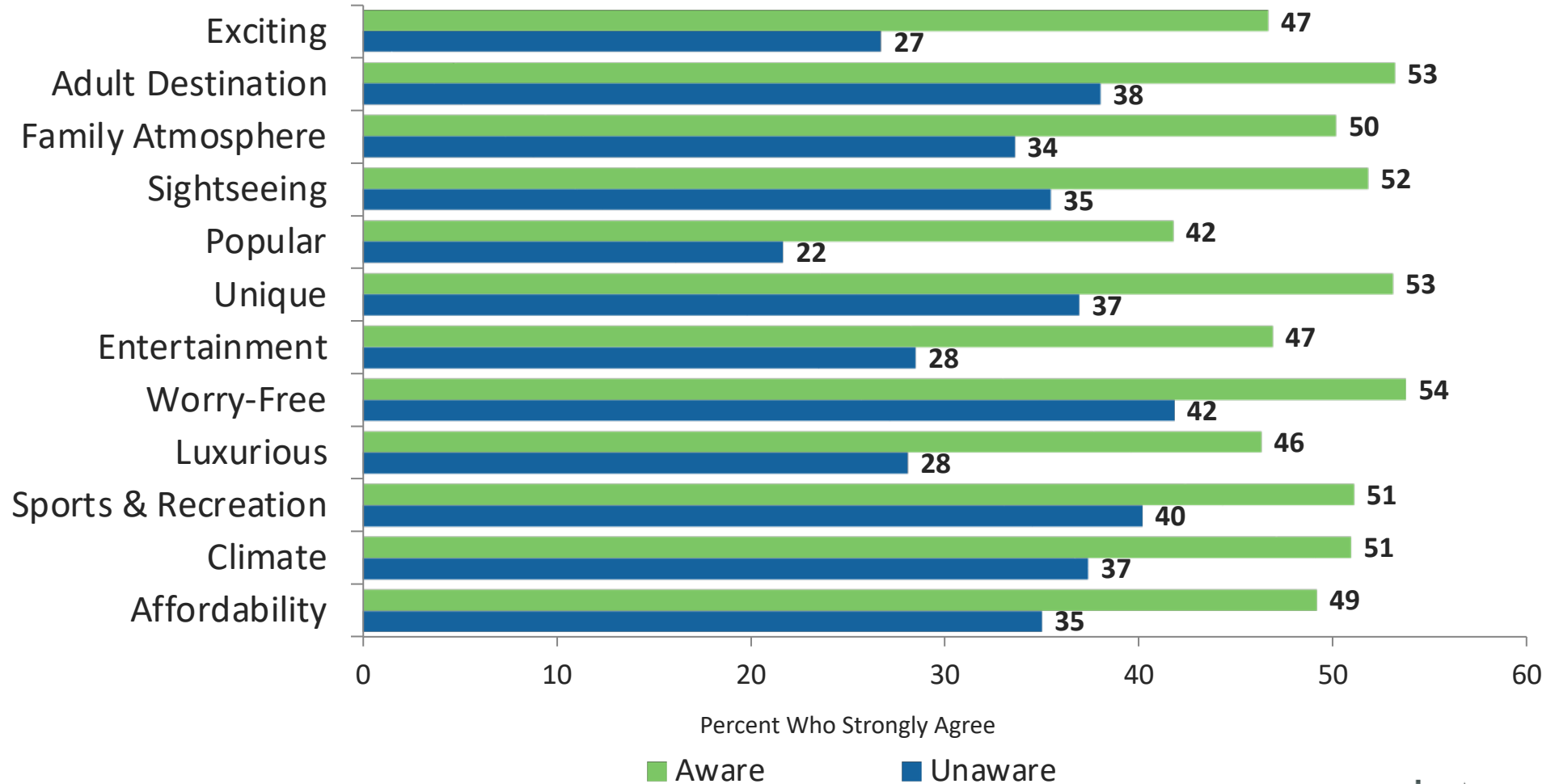


*Saw at least one ad

**“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

Base: New Markets



Hot Buttons Most Impacted by Advertising

Base: New Markets

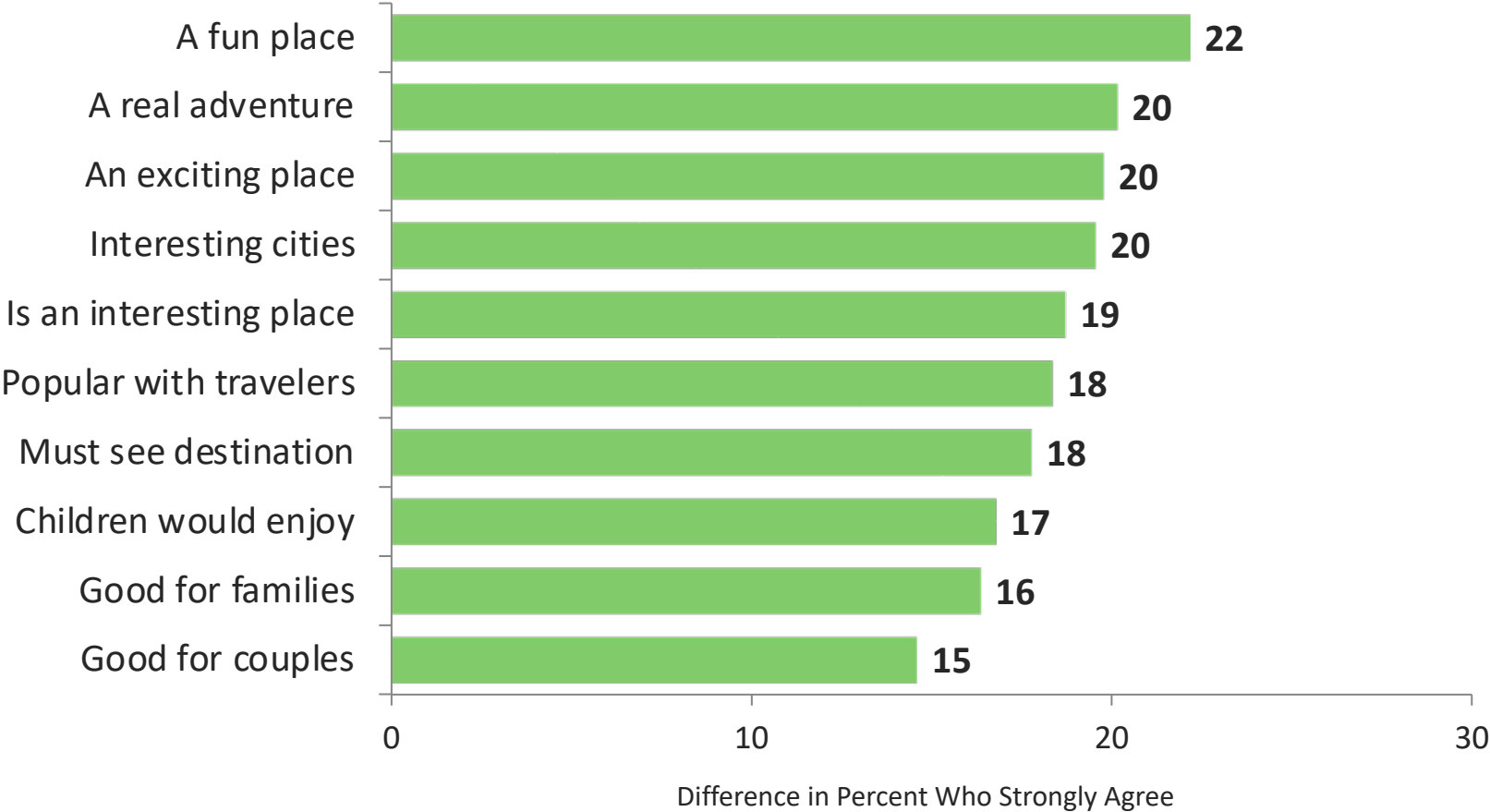


Image Attributes Most Impacted by Advertising

Base: New Markets

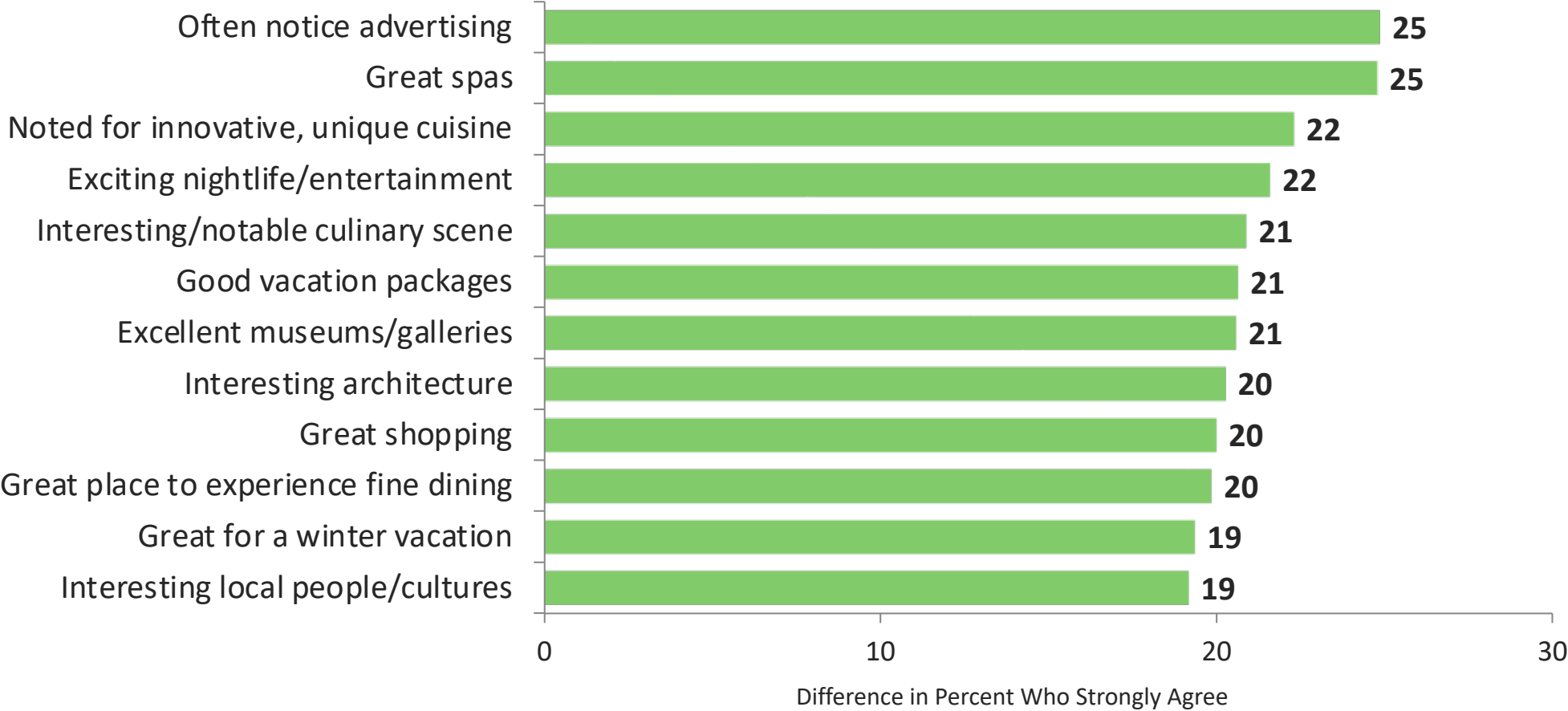


Image Attributes Most Impacted by Advertising (Cont'd)

Base: New Markets

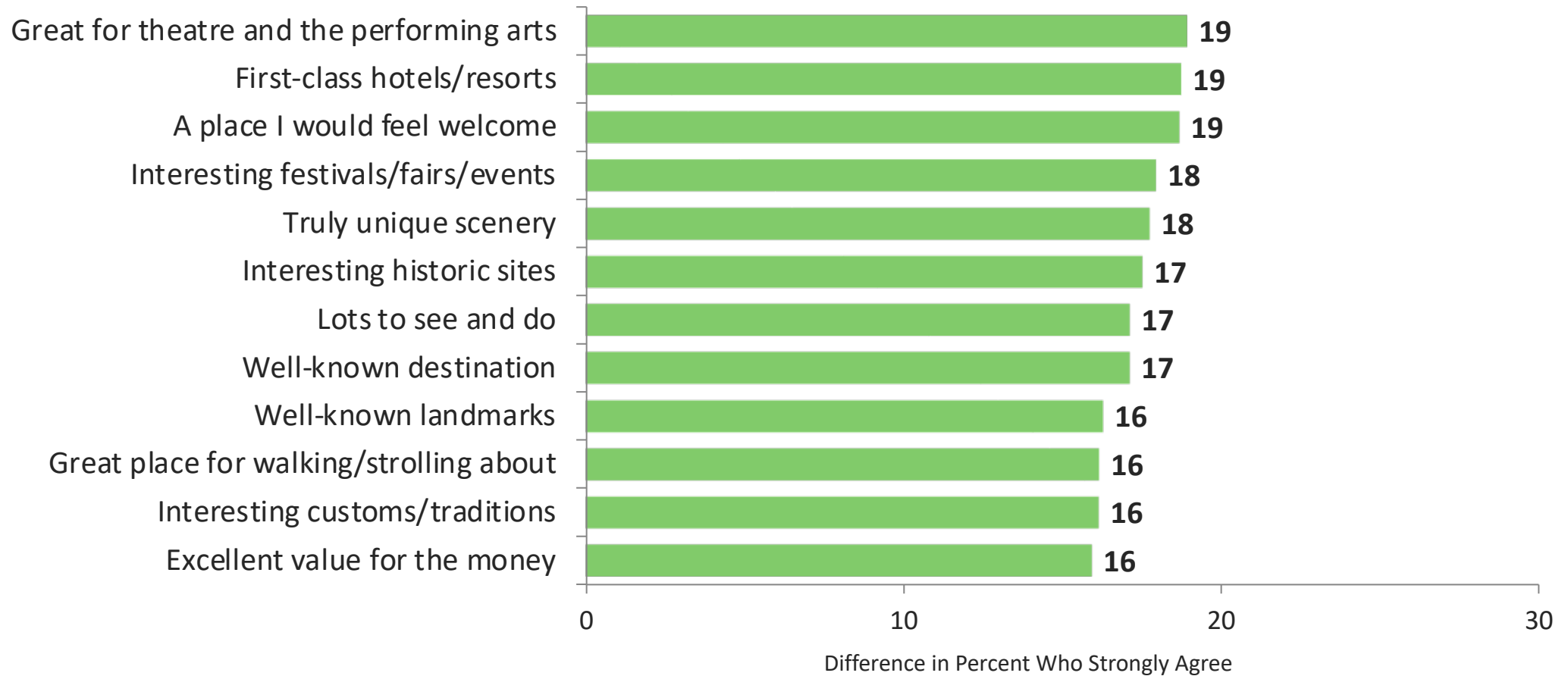


Image Attributes Most Impacted by Advertising (Cont'd)

Base: New Markets

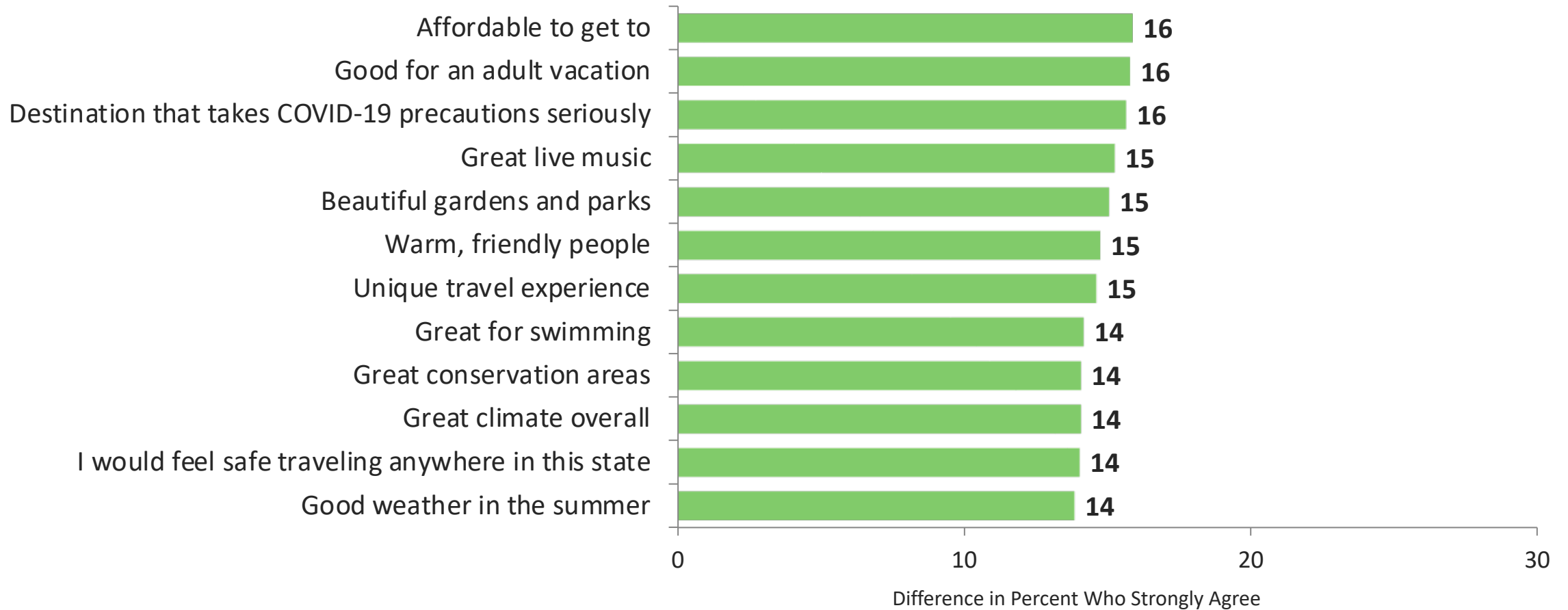


Image Attributes Most Impacted by Advertising (Cont'd)

Base: New Markets

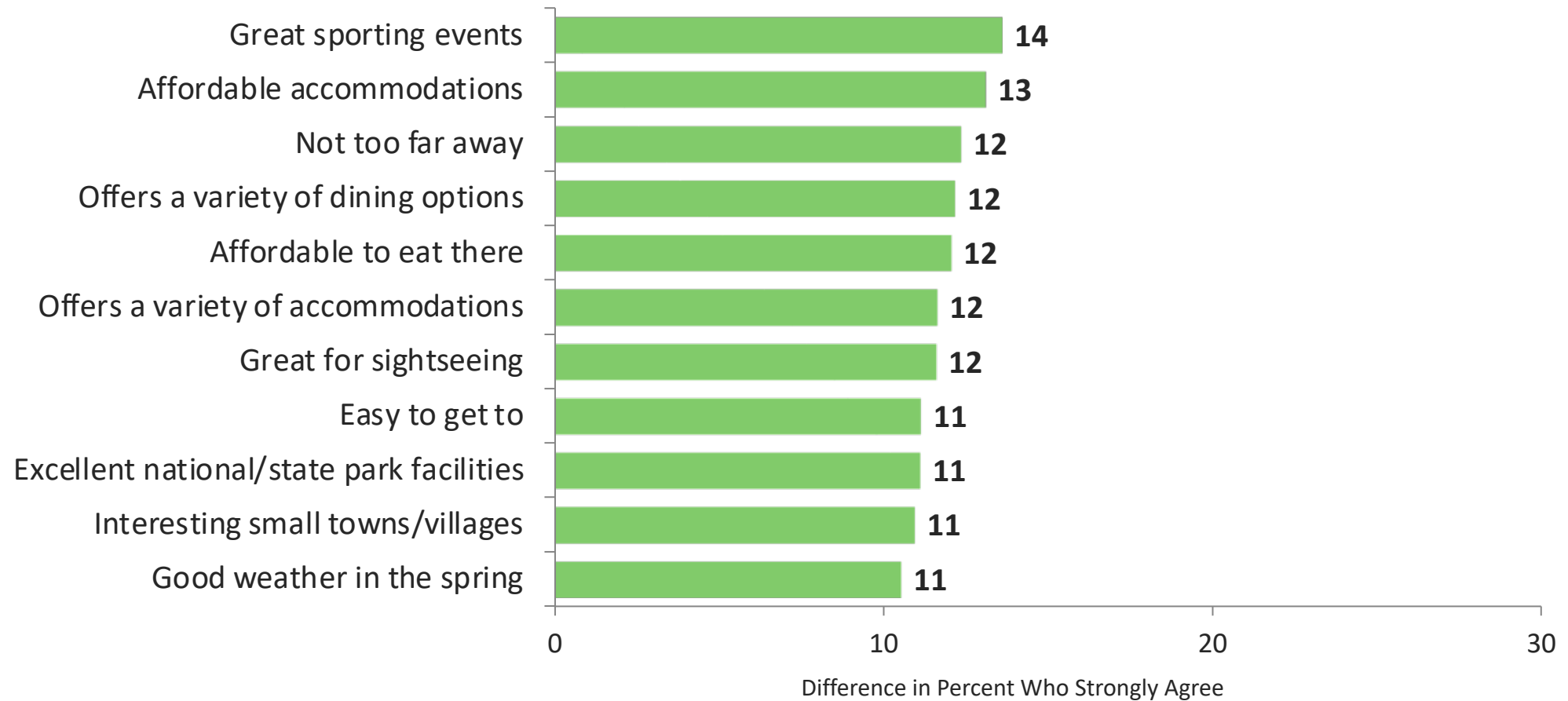
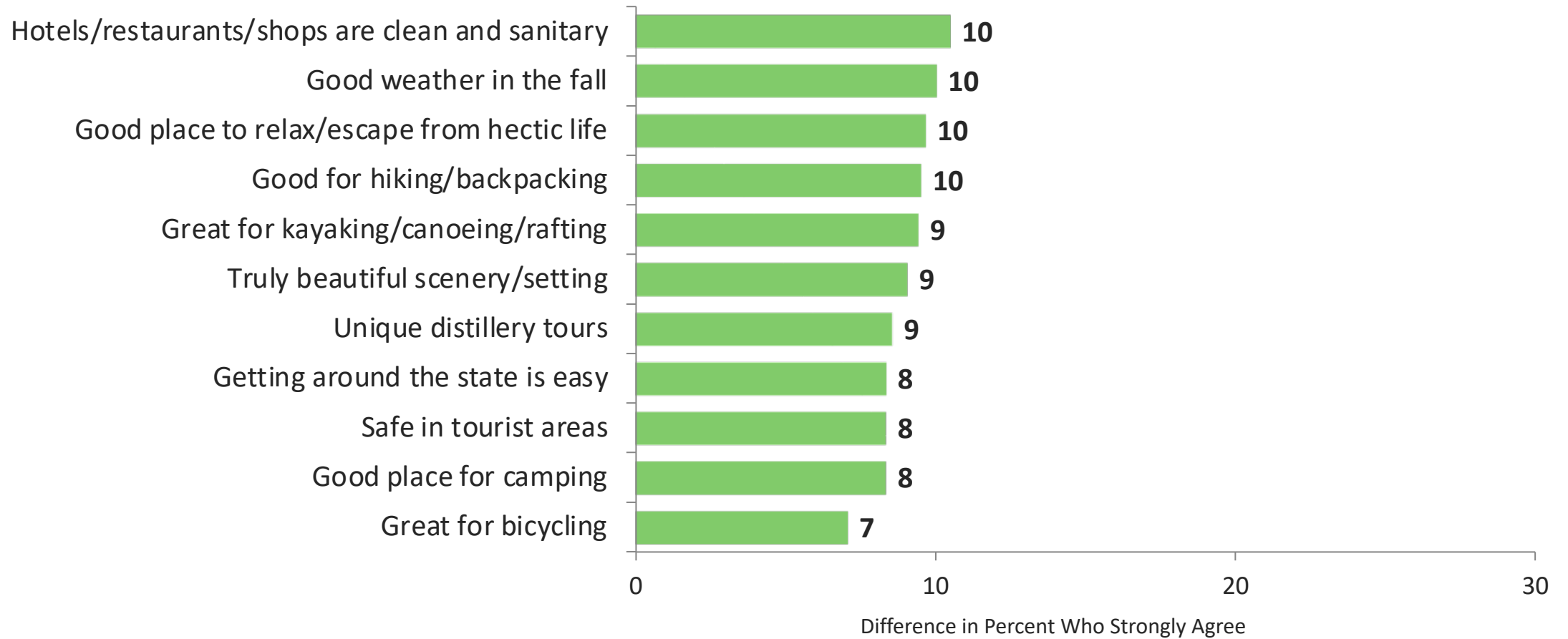


Image Attributes Most Impacted by Advertising (Cont'd)

Base: New Markets





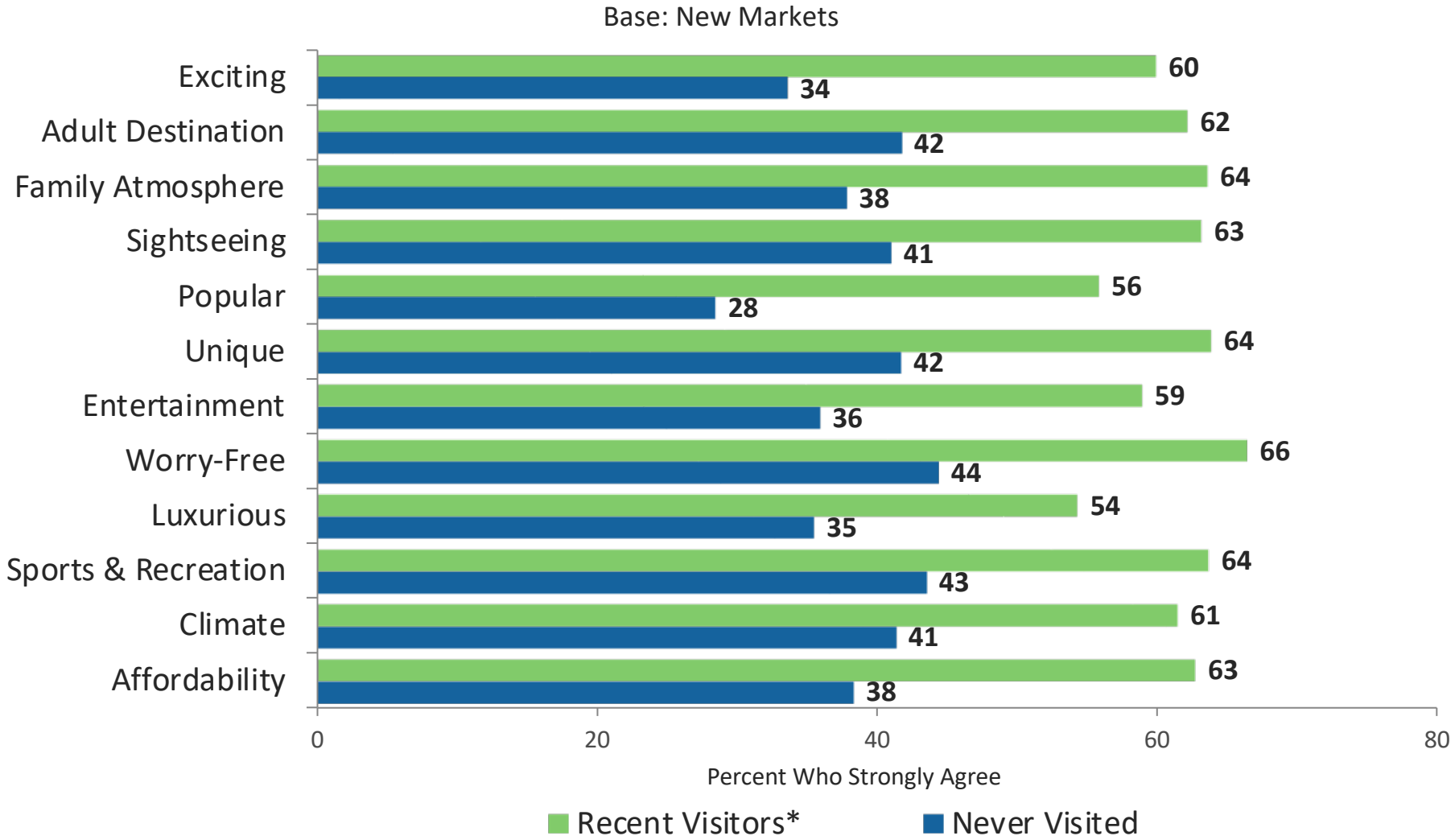
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Kentucky's Product Delivery

Product Delivery

- 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 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 25 points:
 - Must see destination
 - Popular with travelers
 - Is an interesting place
 - A real adventure
 - Children would enjoy
 - A fun place
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

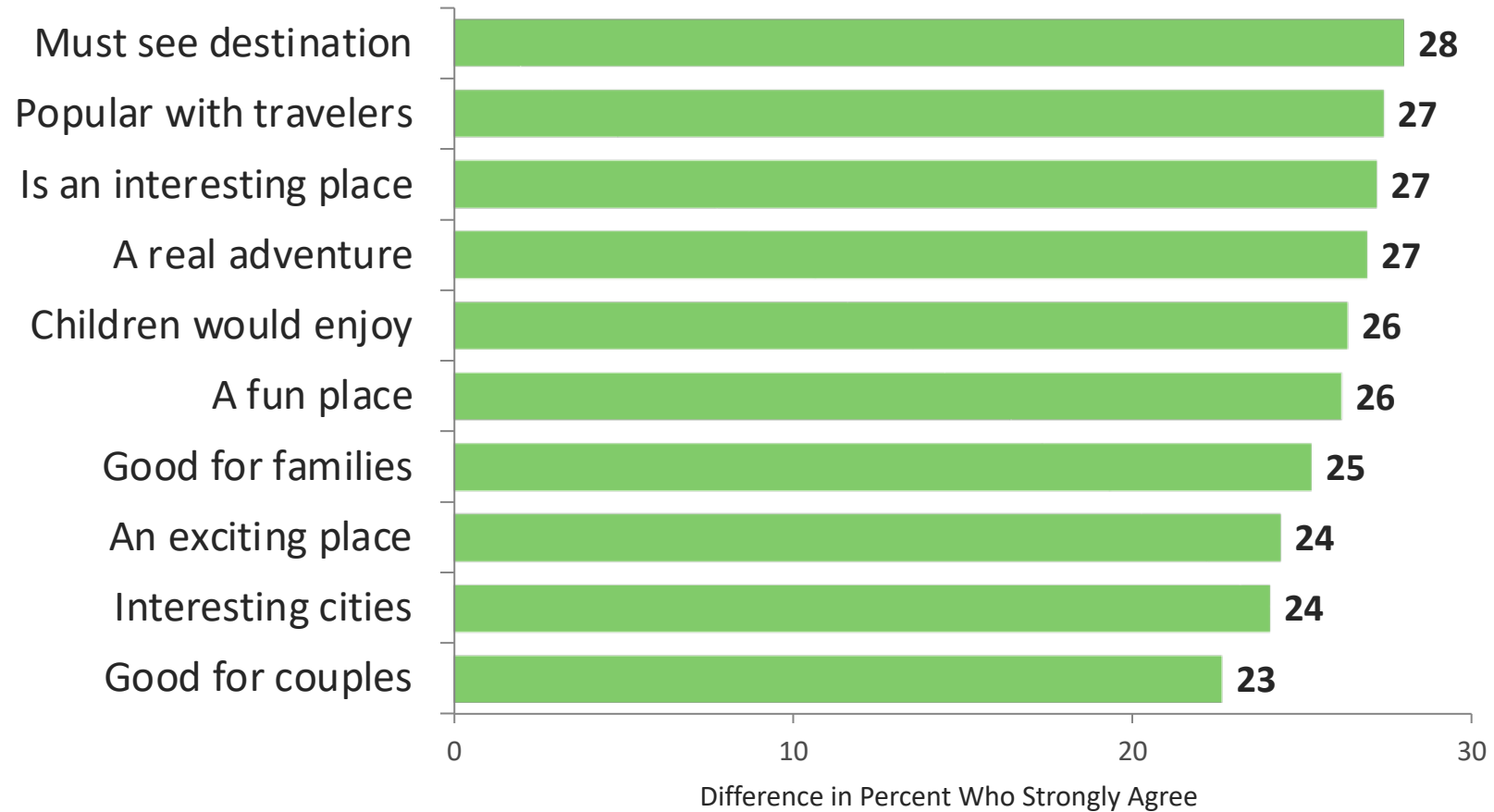
Kentucky Product vs. Image



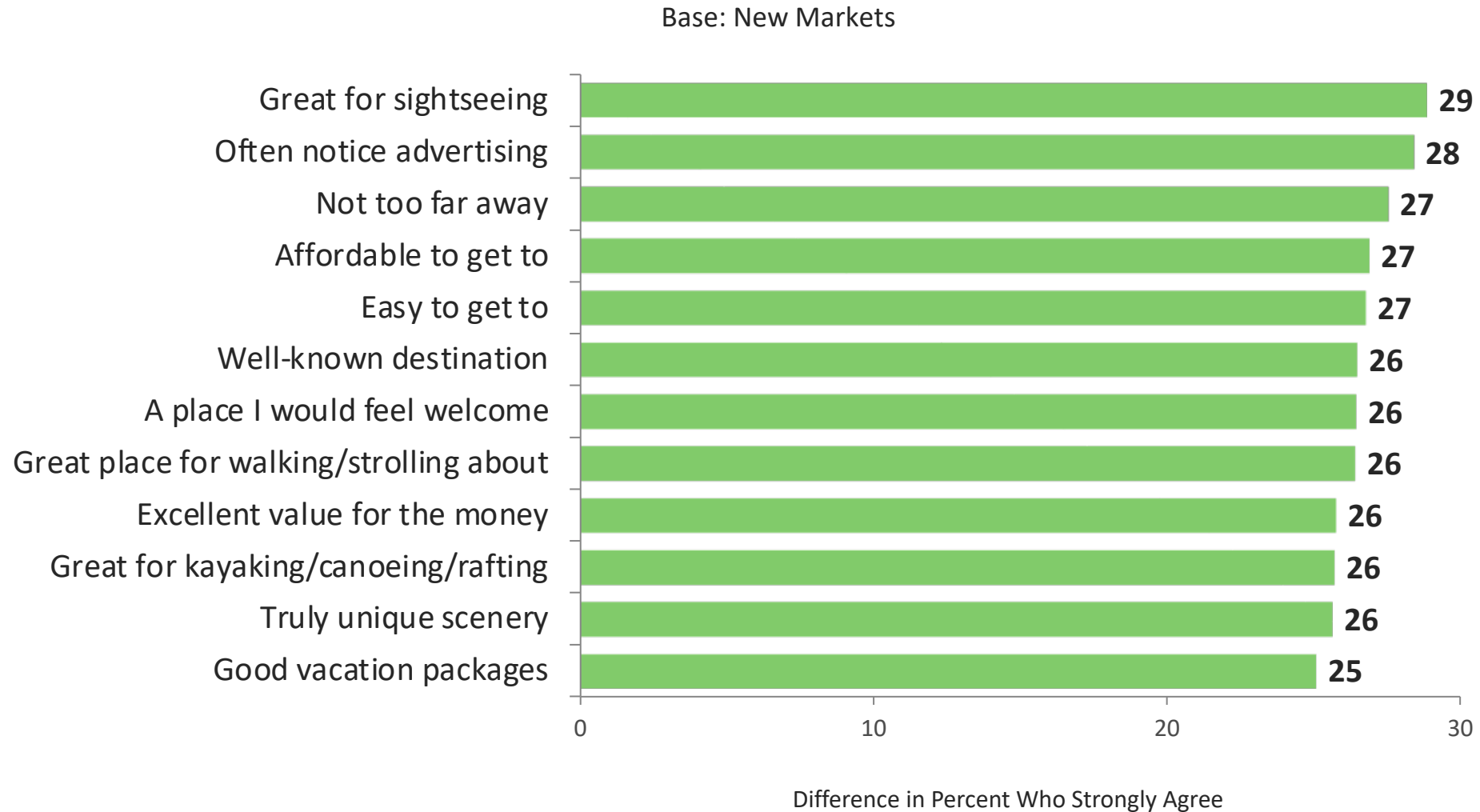
* Visited in the past 2 years

Top Product Strengths vs. Image – Hot Buttons

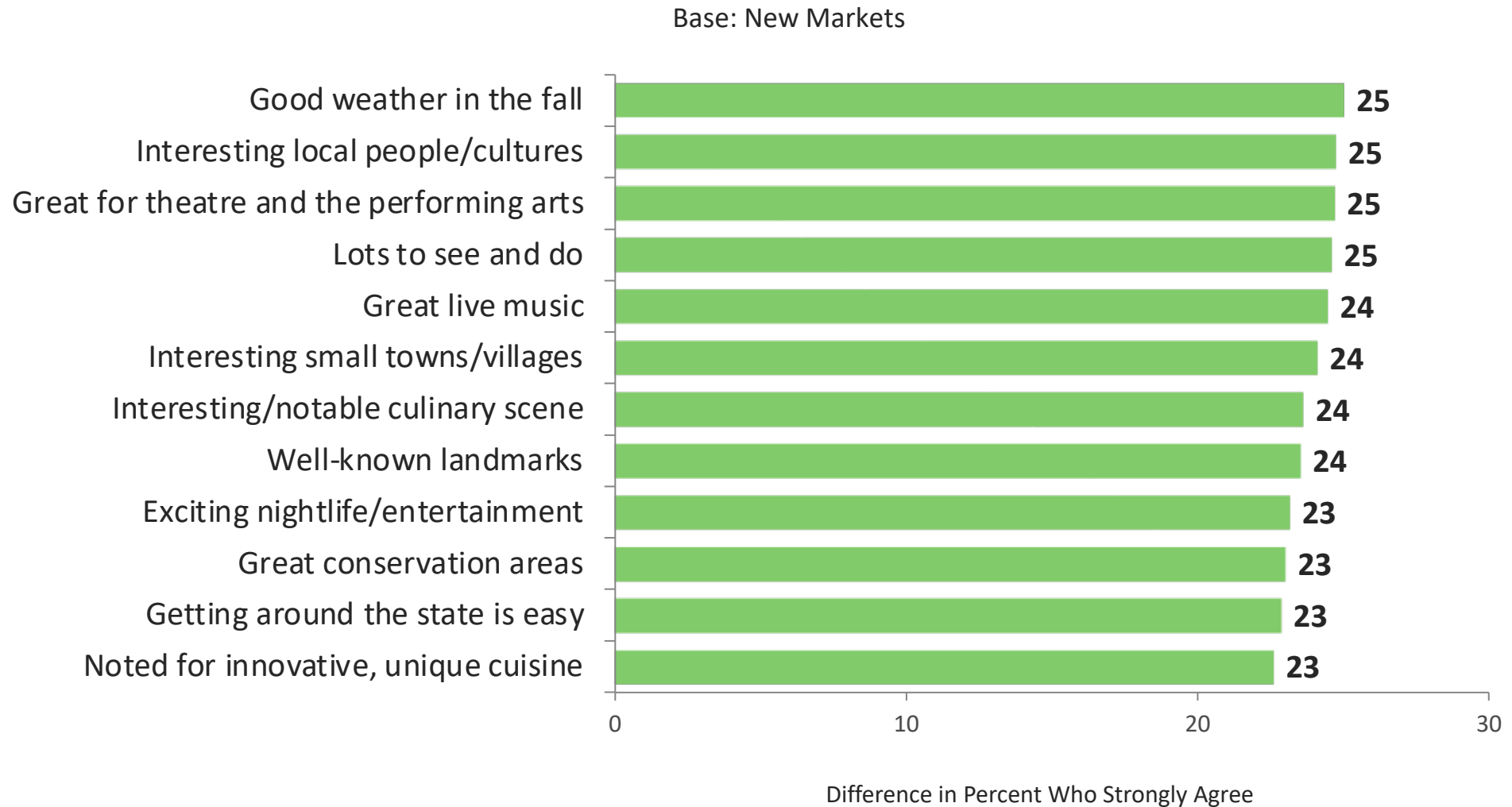
Base: New Markets



Top Product Strengths vs. Image



Top Product Strengths vs. Image (Cont'd)

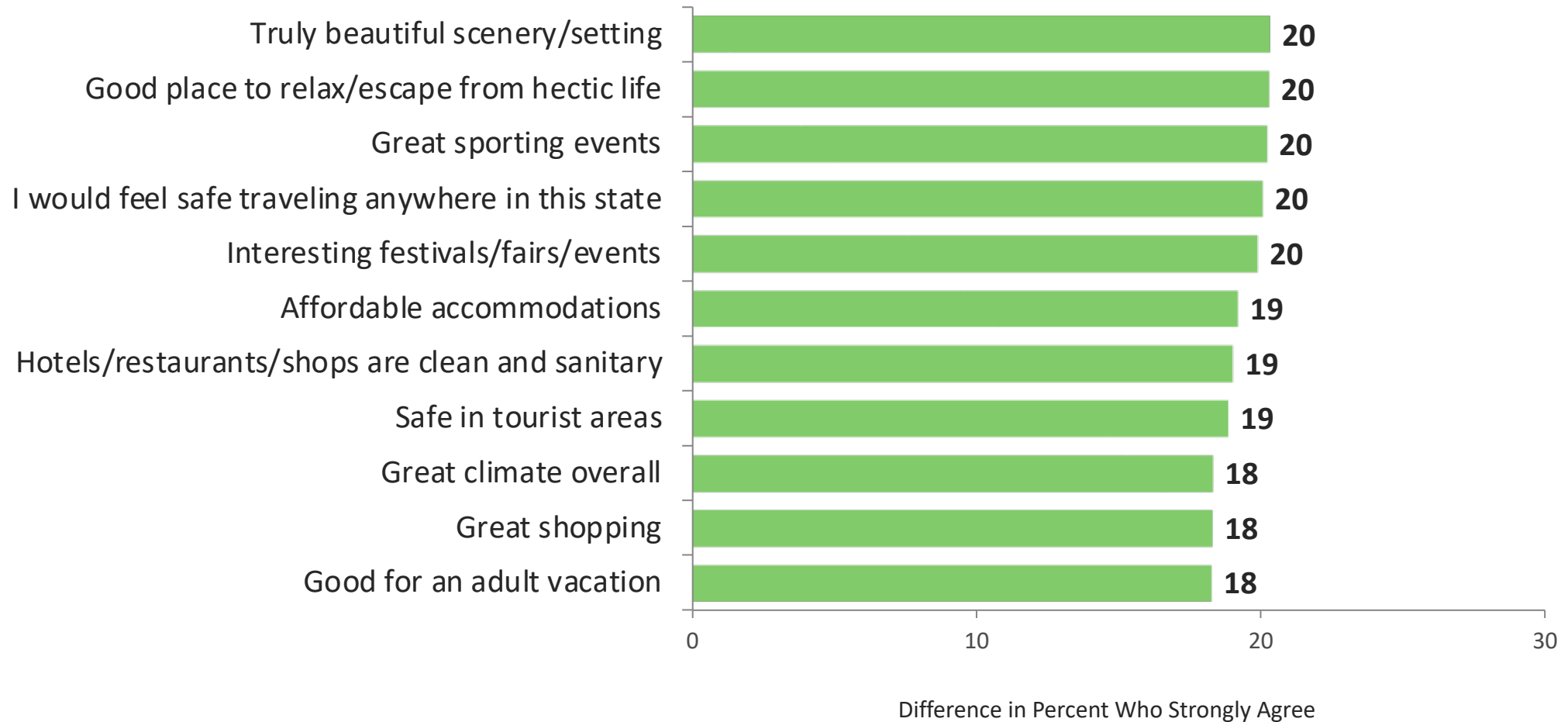


Top Product Strengths vs. Image (Cont'd)



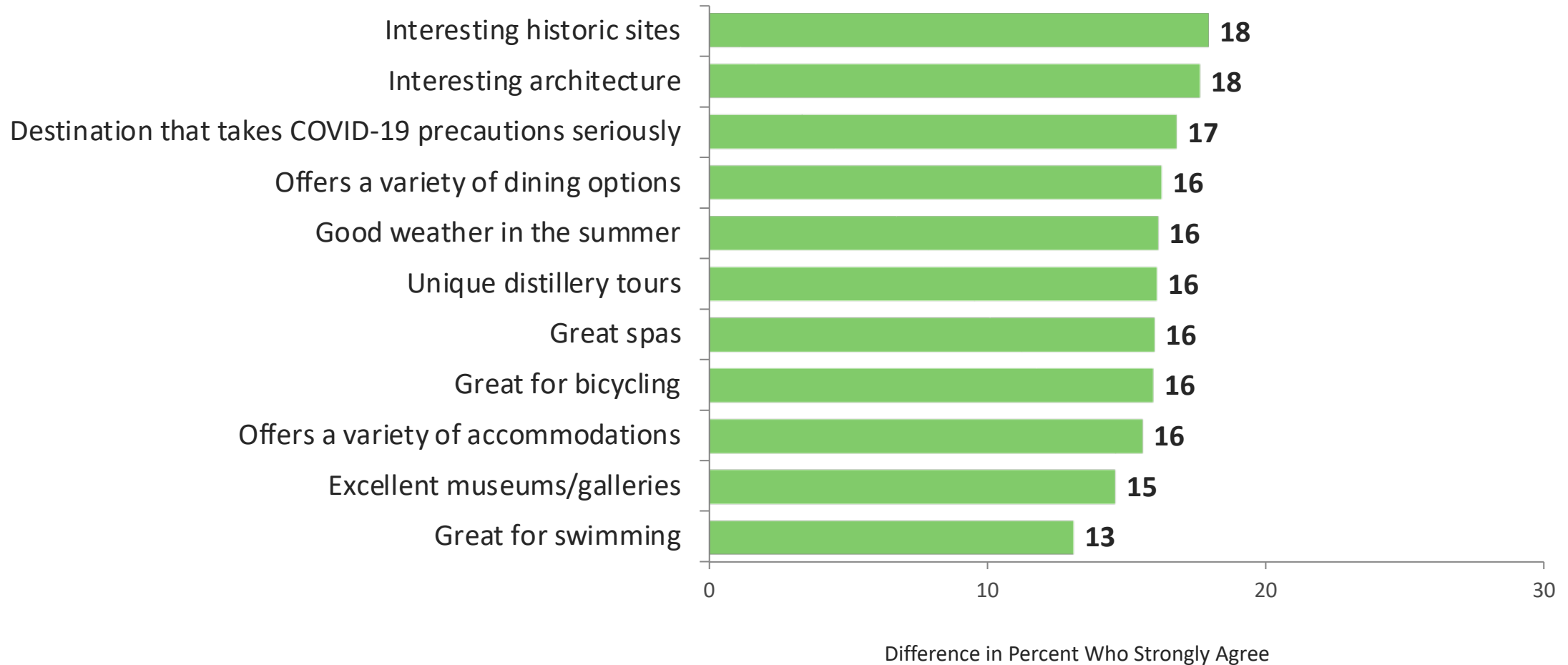
Top Product Strengths vs. Image (Cont'd)

Base: New Markets



Top Product Strengths vs. Image (Cont'd)

Base: New Markets



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



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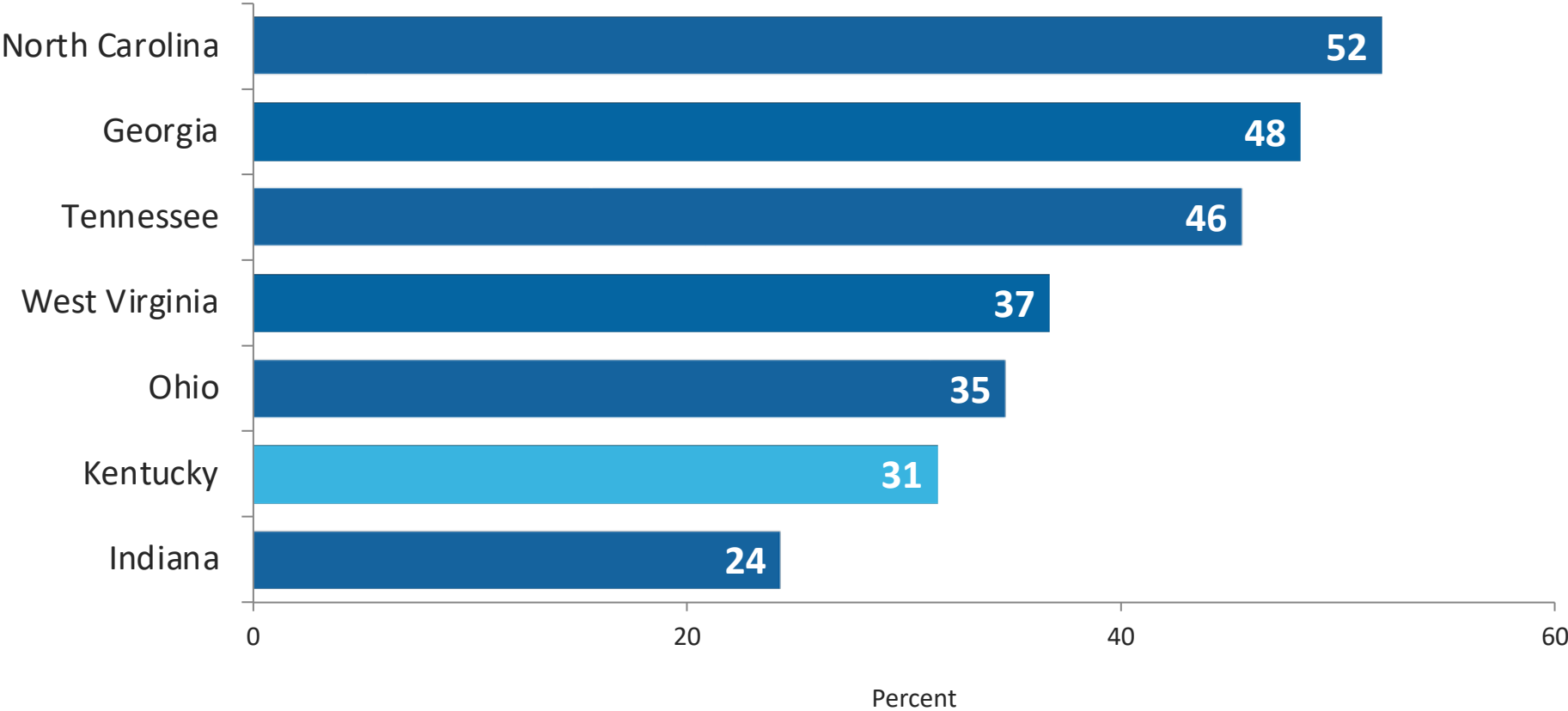
Destination
Visitation
& Interest

Destination Visitation & Intent

- Three in ten (31%) travelers within the new advertising markets have visited Kentucky during their lifetimes.
- Over one in ten (16%) travelers within the new advertising markets have visited Kentucky during the past 2 years
- A third (32%) of travelers within the new advertising markets intend to visit Kentucky during the next 12 months.
- Among travelers who visited Kentucky overnight, the two most popular activities were shopping and trying unique/local foods.

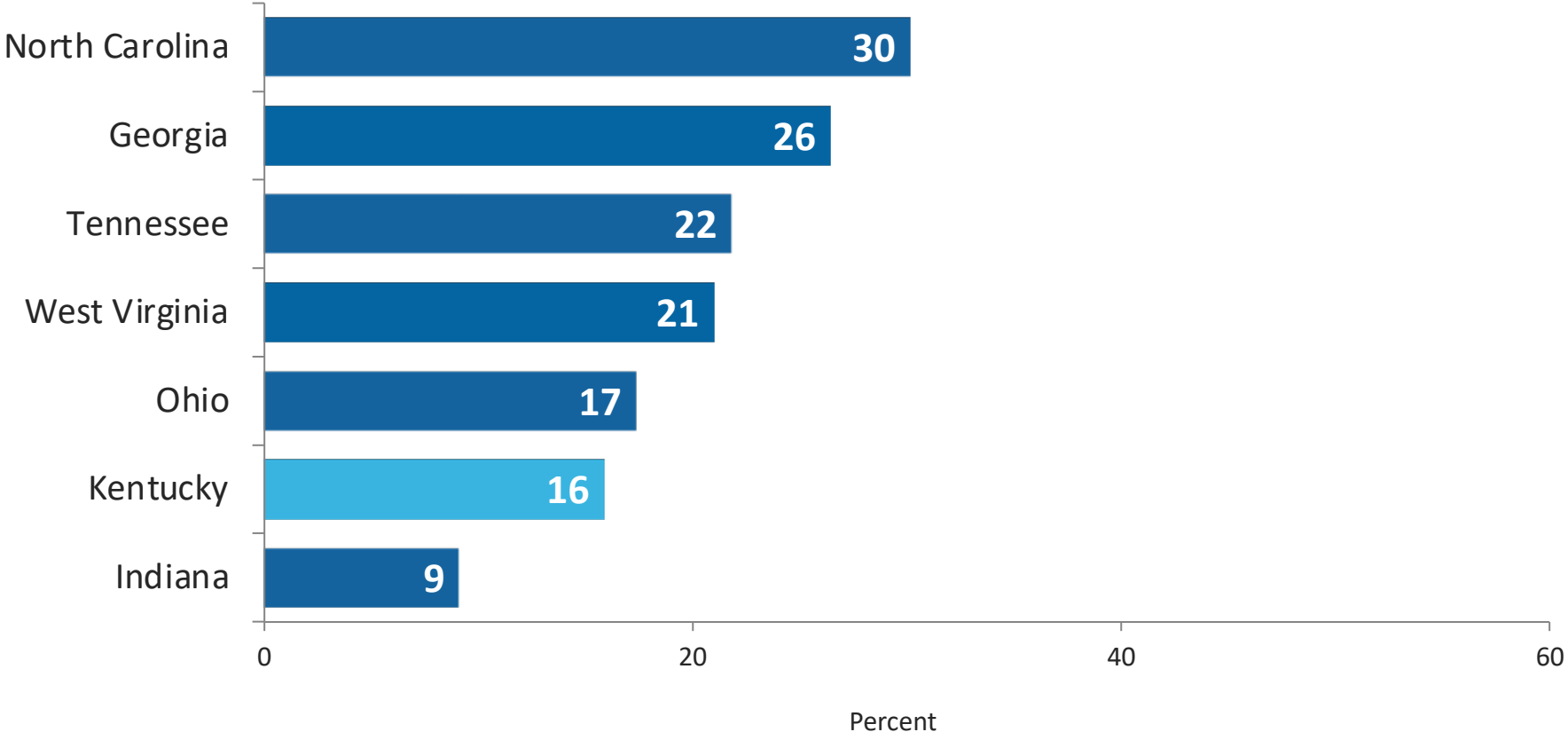
Destinations Ever Visited

Base: New Markets



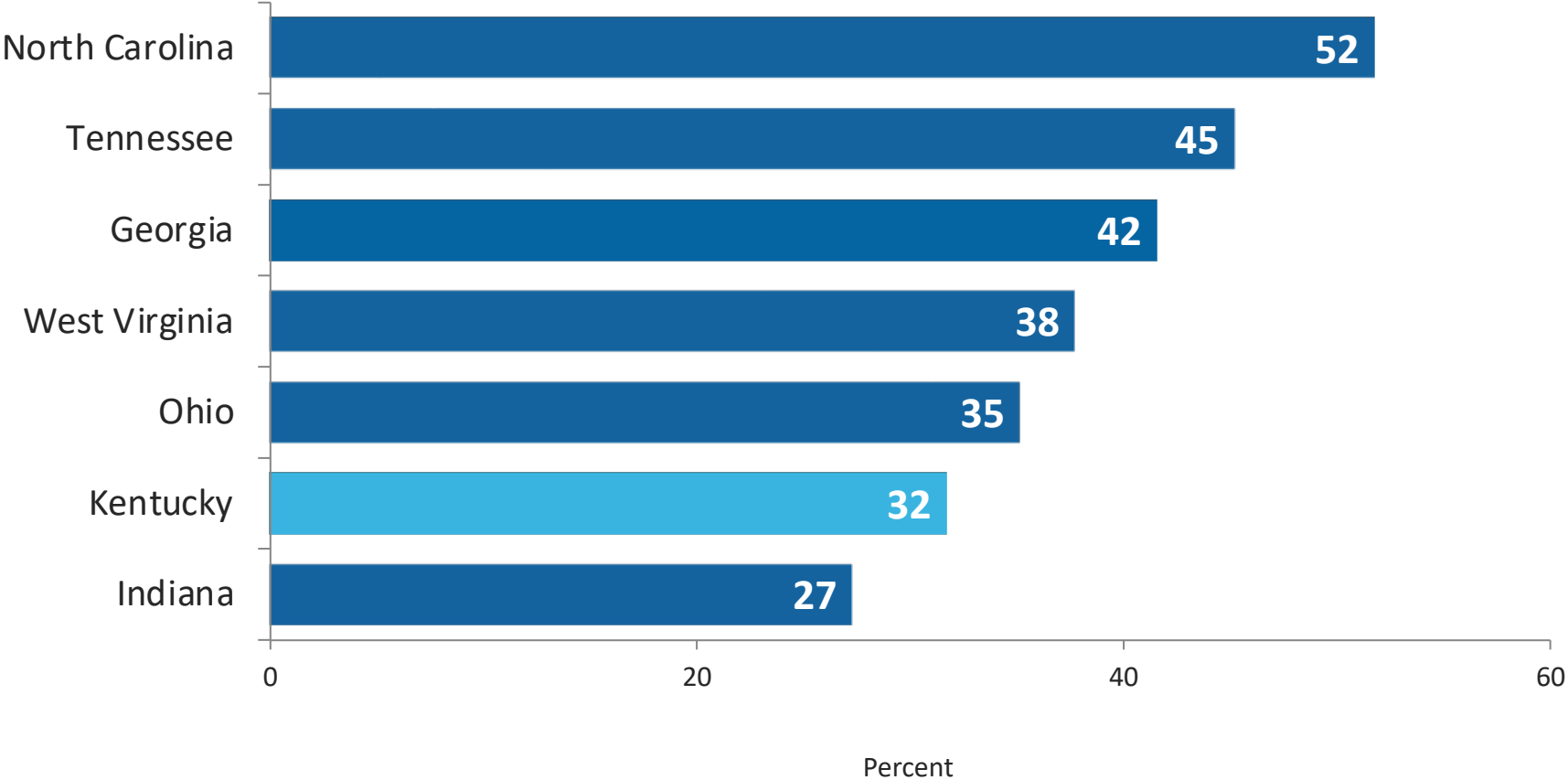
Destinations Visited in Past 2 Years

Base: New Markets



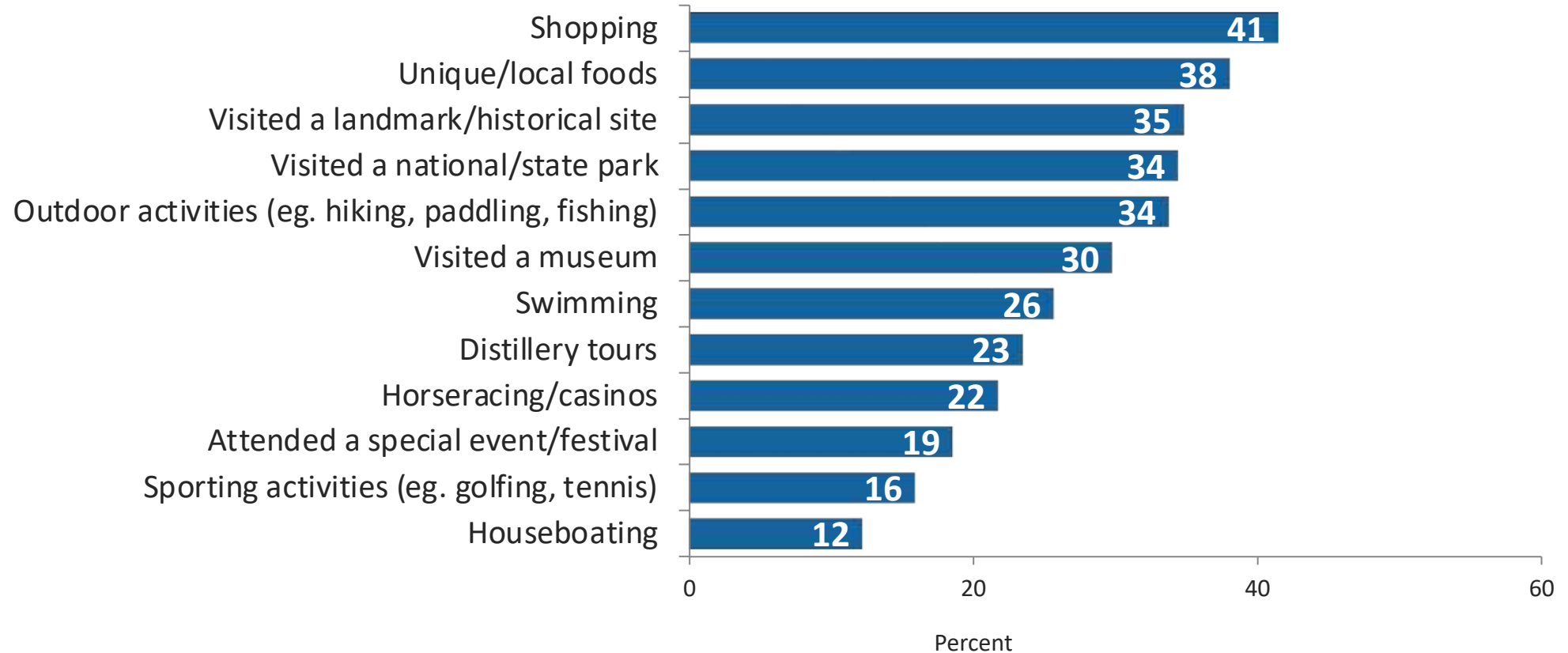
Destinations Intend to Visit in Next 12 Months

Base: New Markets



Activities Participated on Overnight Trip to Kentucky

Base: New Markets





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Kentucky's Image vs. Competition

Kentucky's Image

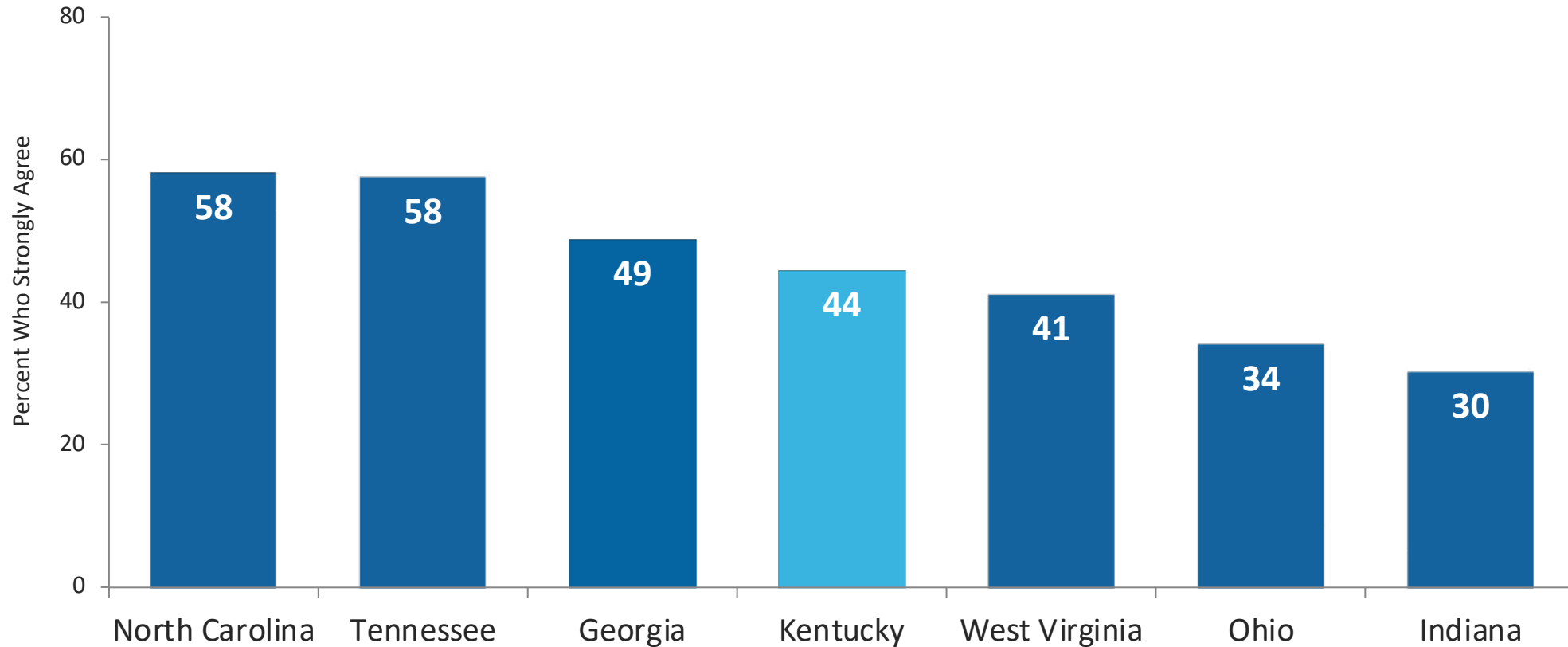
- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their new advertising markets:
 - Across the new markets surveyed, over four in ten (44%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
 - Ahead of West Virginia, Ohio, and Indiana.
 - Behind North Carolina, Tennessee and Georgia.
- On the other overall image measure, perceptions as being “excellent value for money”, the rank ordering is different:
 - Kentucky (44%) is tied for first with West Virginia, Georgia, and Tennessee.
 - North Carolina, Indiana, and Ohio trail.
- When comparing Kentucky's image versus the image of the combined competition, Kentucky's one image strength is unique distillery tours.

Kentucky's Image

- There are 10 weakness Kentucky had in comparison to the combined competitive set:
 - Great for theatre and the performing arts
 - First-class hotels/resorts
 - Popular with travelers (Hot Button)
 - Exciting nightlife/entertainment
 - Well-known destination
 - Great place to experience fine dining
 - Often notice advertising
 - Great shopping
 - Excellent museums/galleries
 - Great for swimming

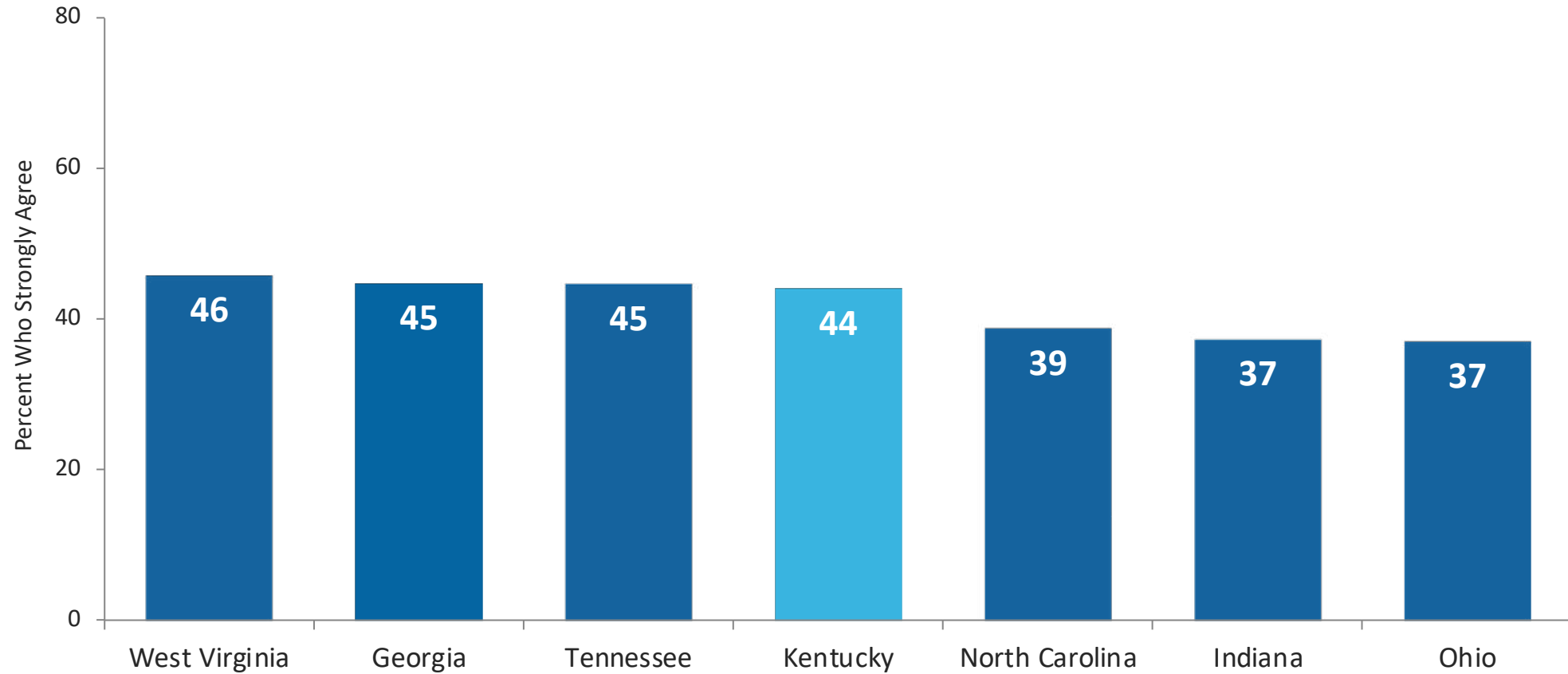
Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”

Base: New Markets



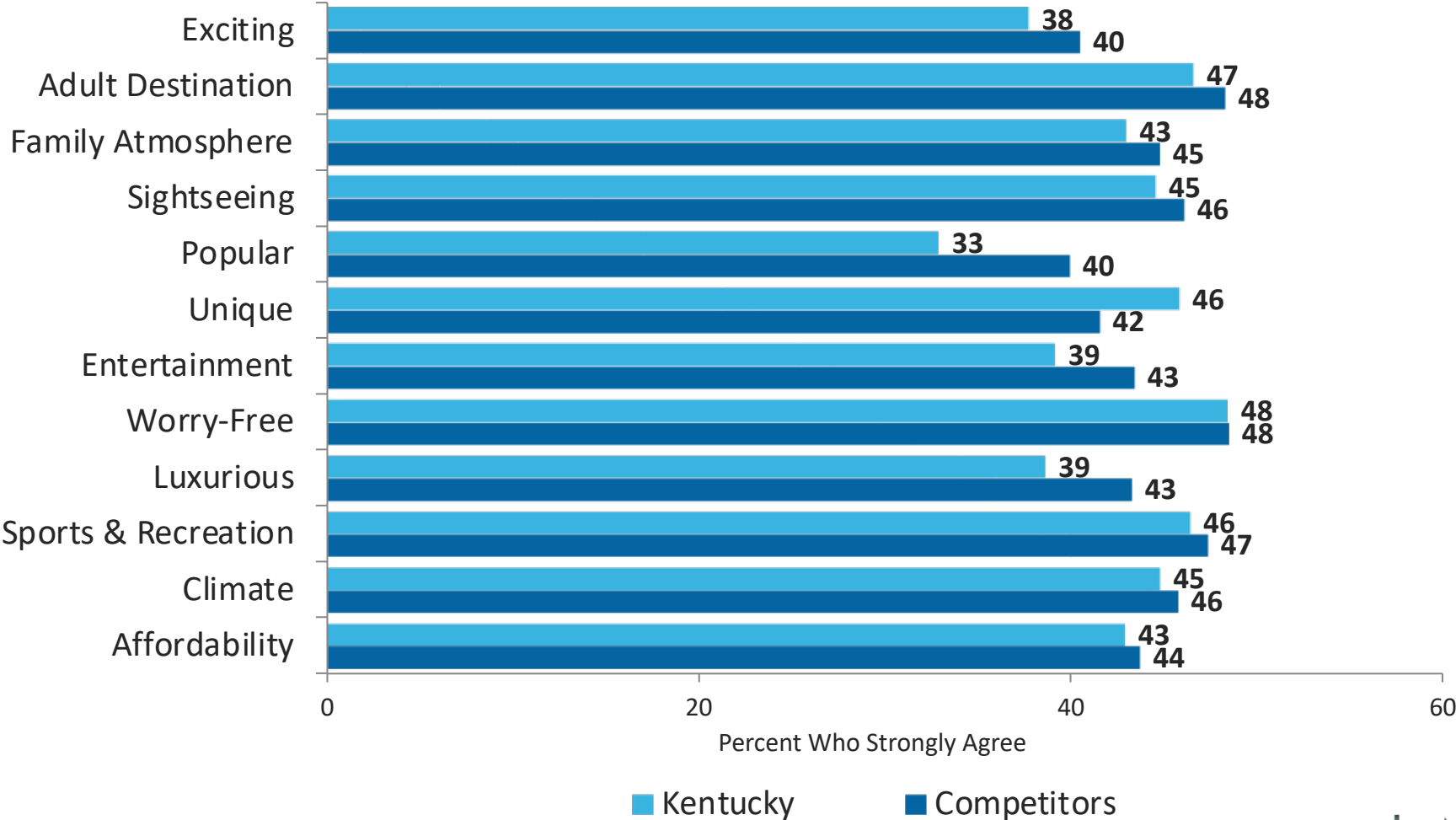
Kentucky Overall Image vs. Competition — “Excellent Value For the Money”

Base: New Markets



Kentucky's Overall Image vs. Competition

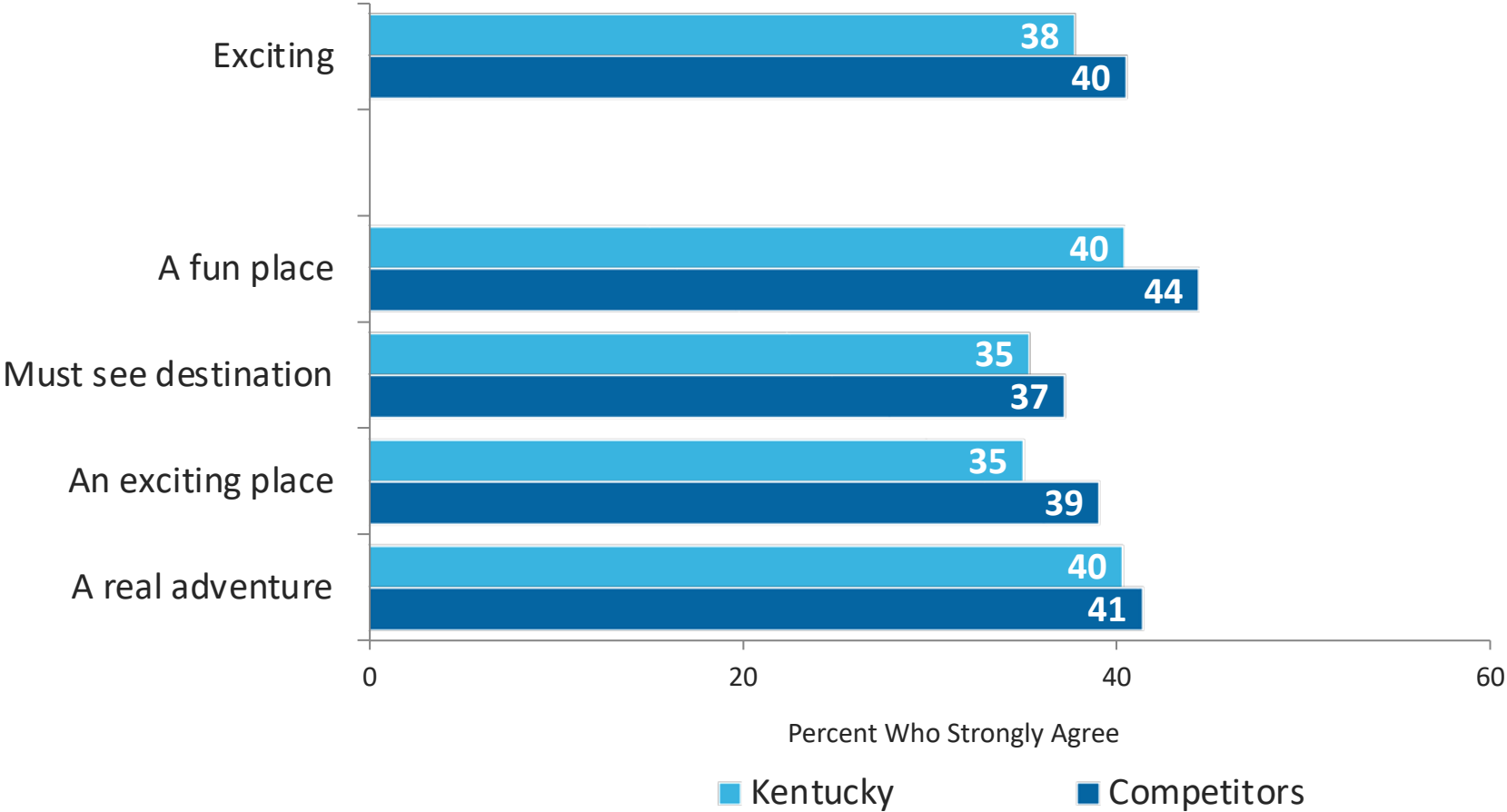
Base: New Markets



* Includes Tennessee, North Carolina, Georgia, Indiana, Ohio, West Virginia

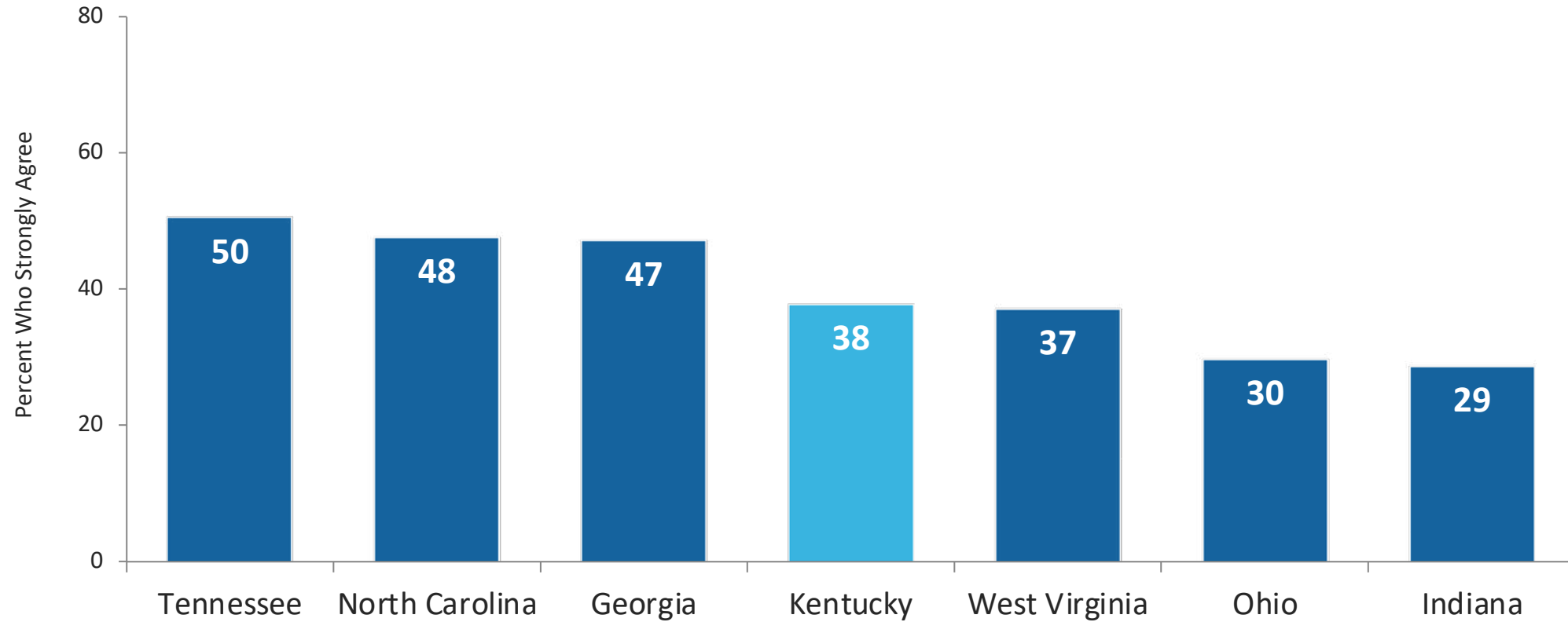
Kentucky's Image vs. Competition — Exciting

Base: New Markets



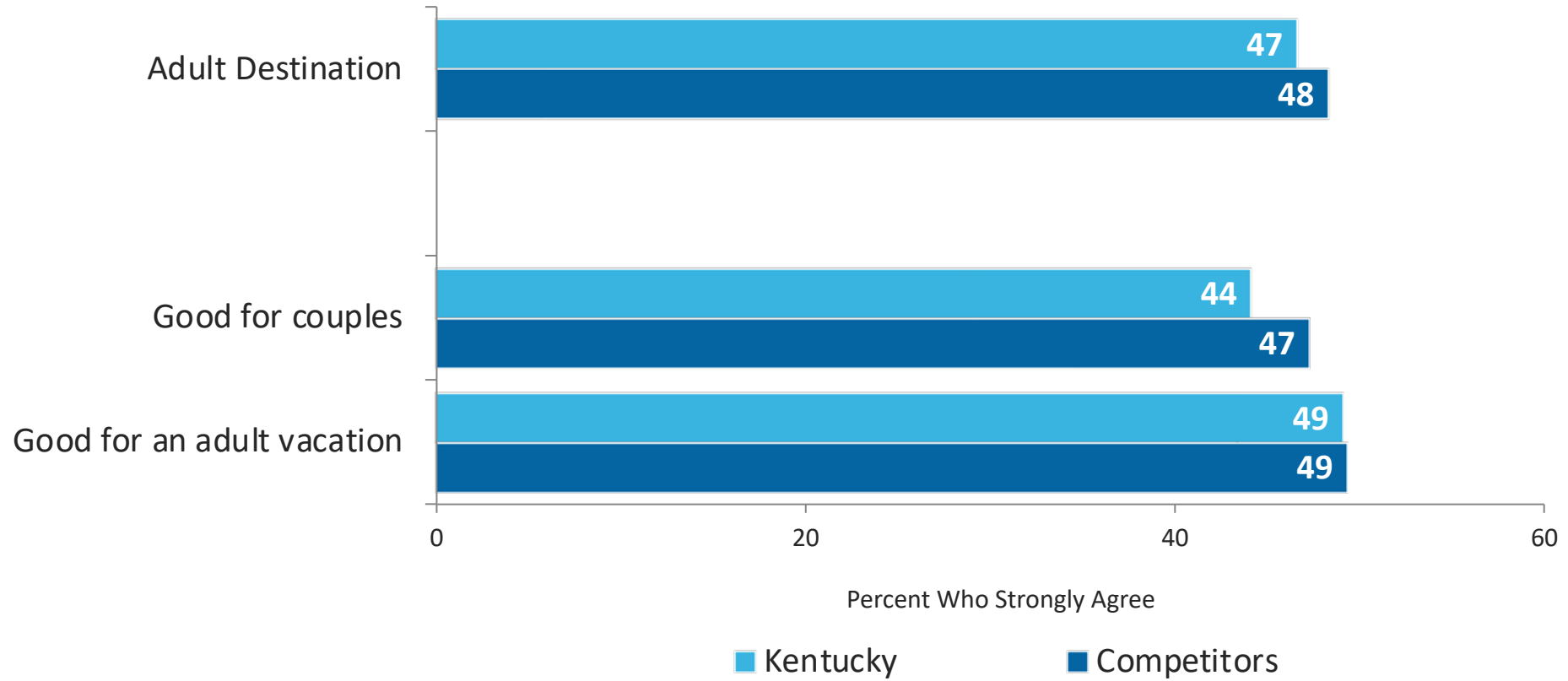
Kentucky's Image vs. Competition — Exciting

Base: New Markets



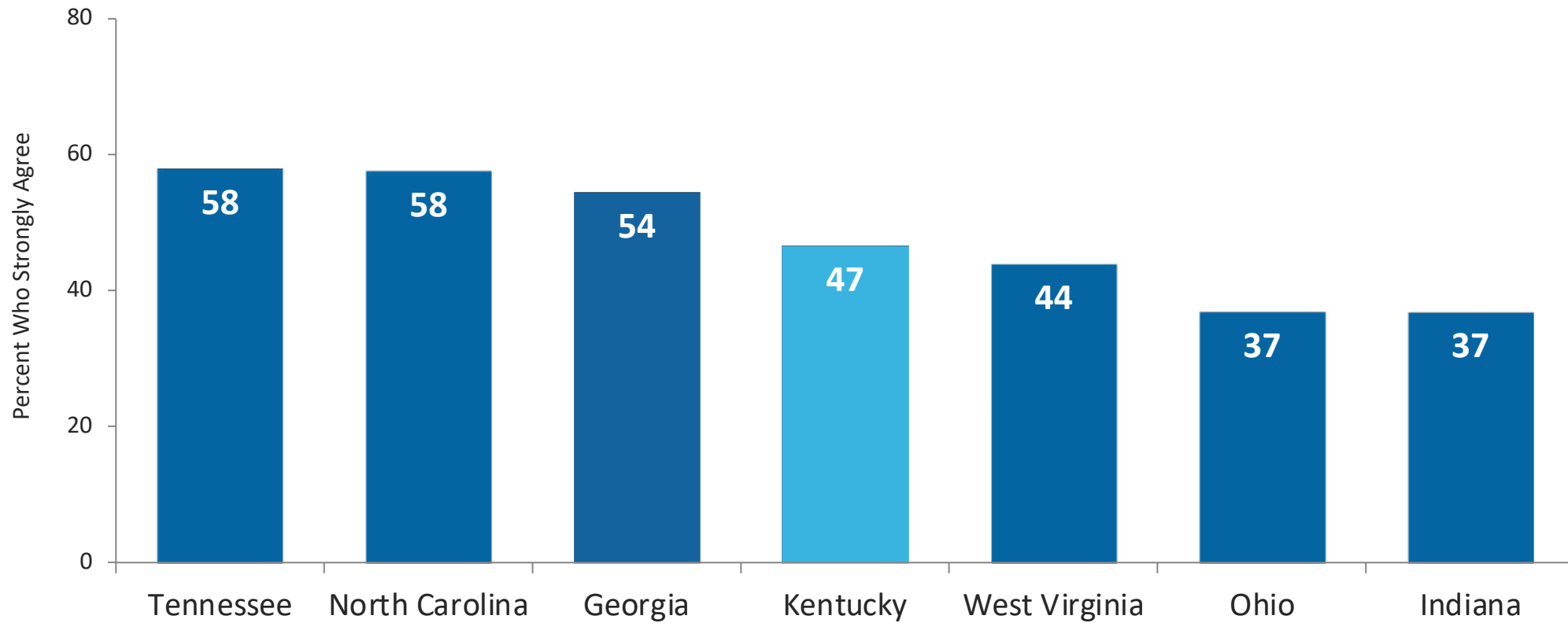
Kentucky's Image vs. Competition — Adult Destination

Base: New Markets



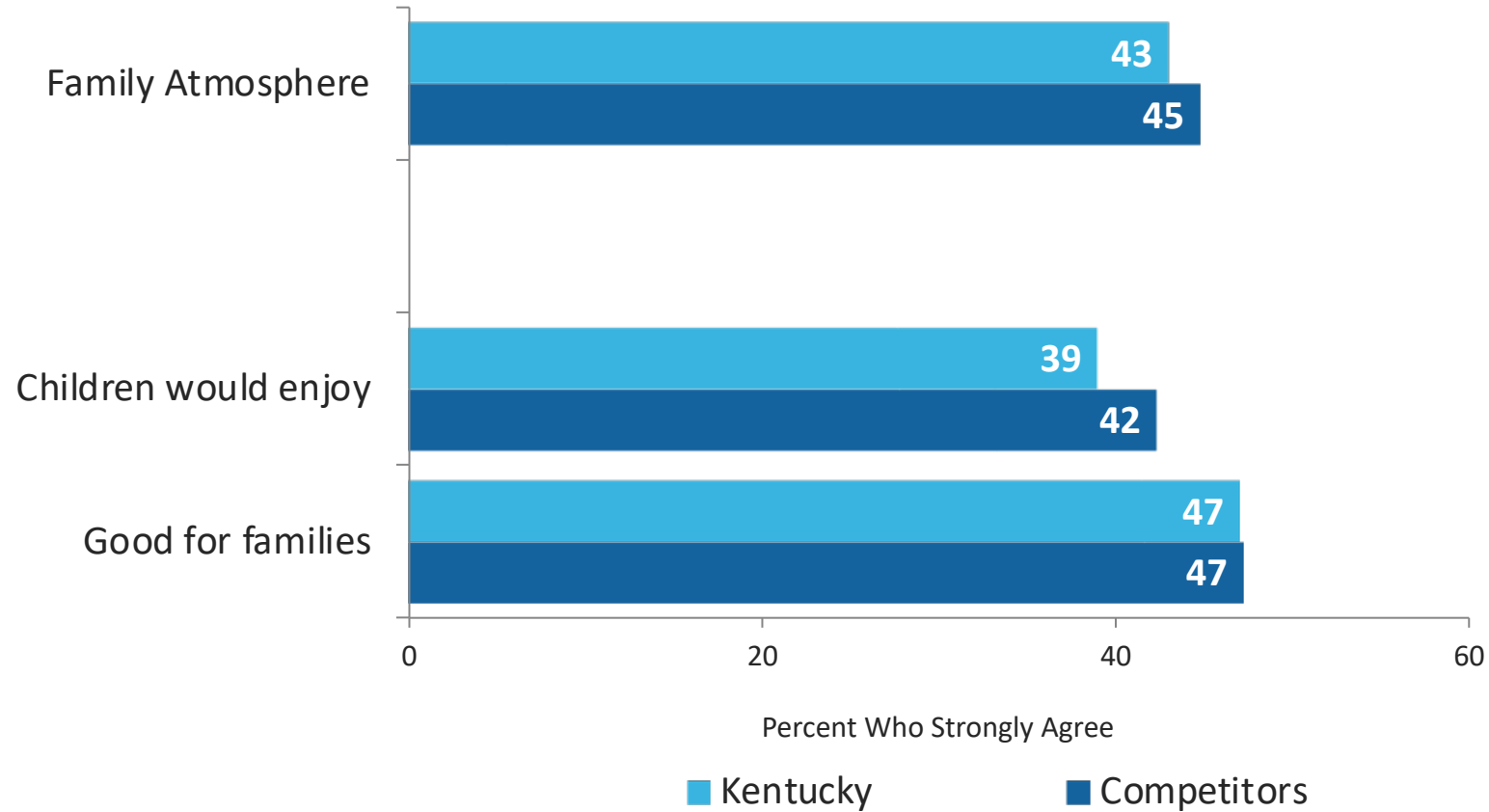
Kentucky's Image vs. Competition — Adult Destination

Base: New Markets



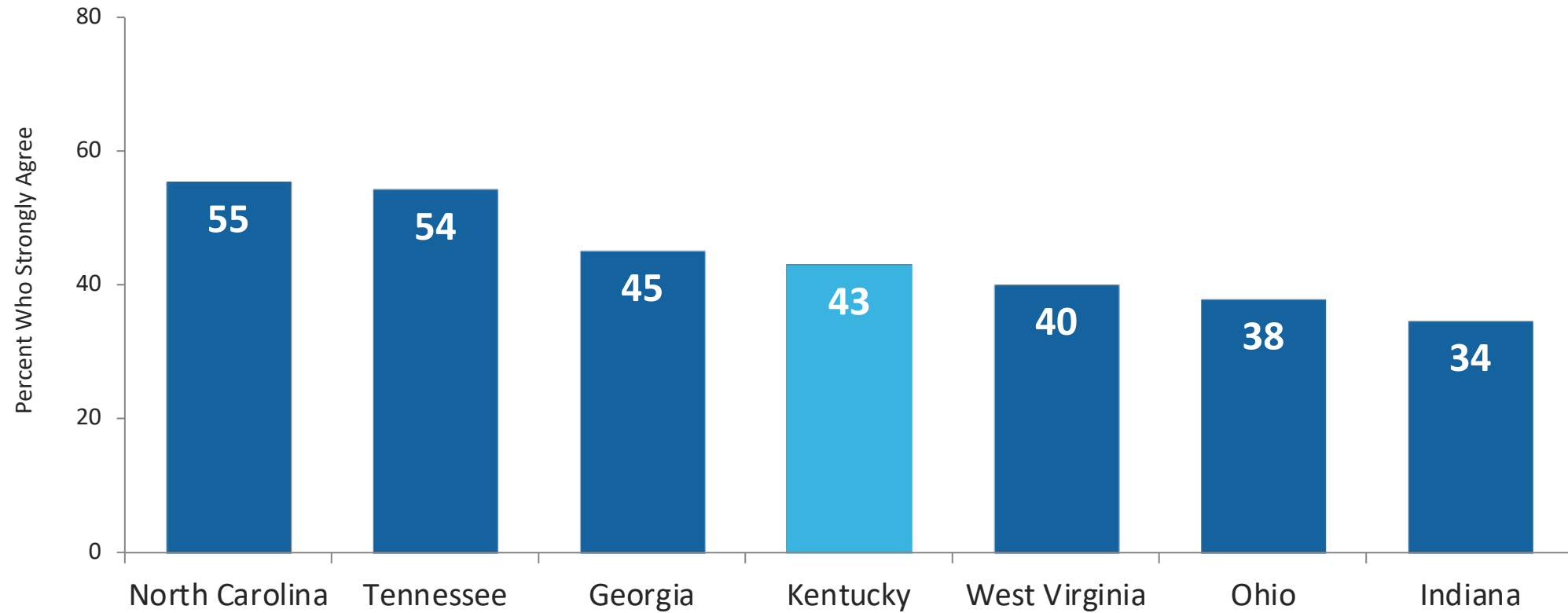
Kentucky's Image vs. Competition — Family Atmosphere

Base: New Markets



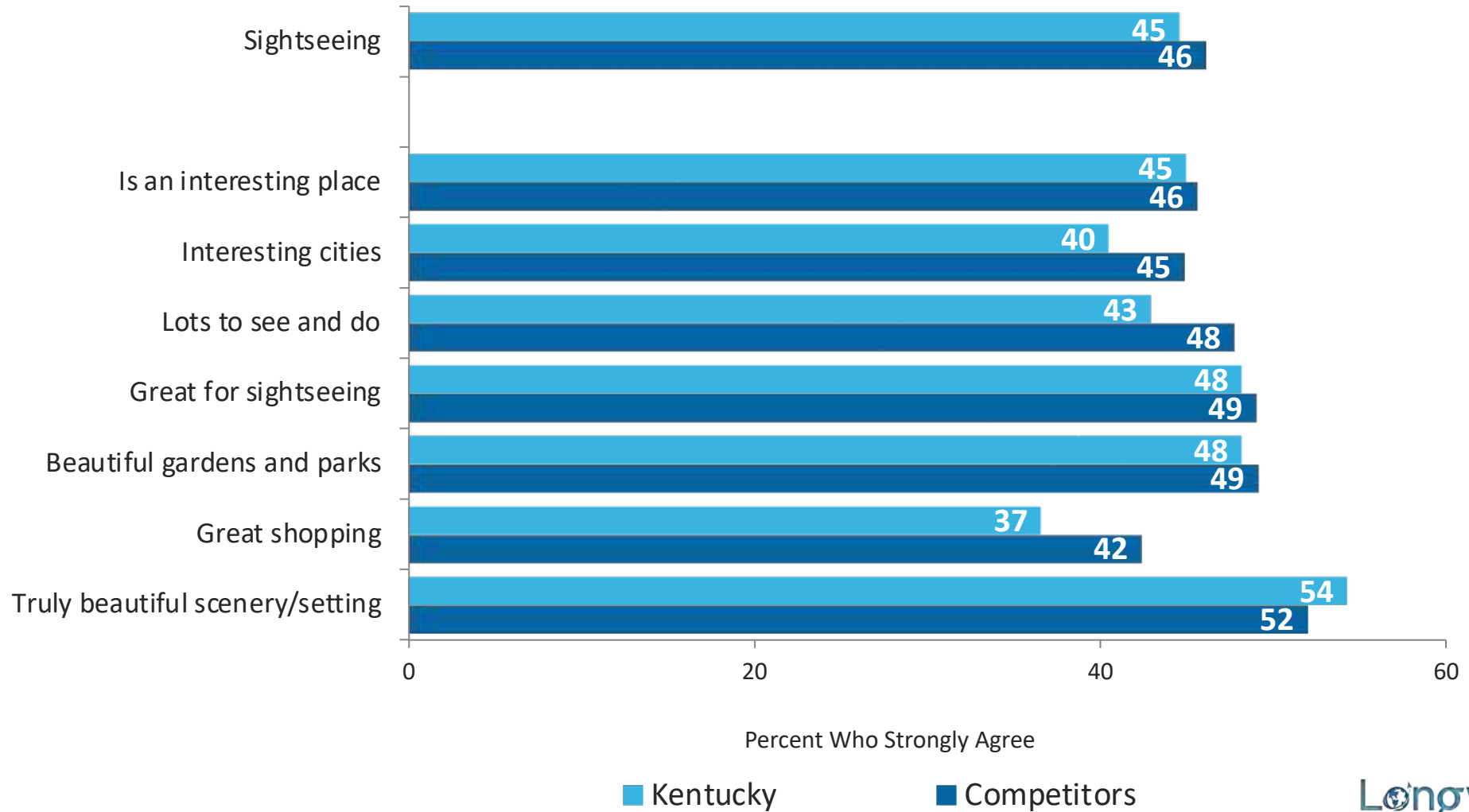
Kentucky's Image vs. Competition — Family Atmosphere

Base: New Markets



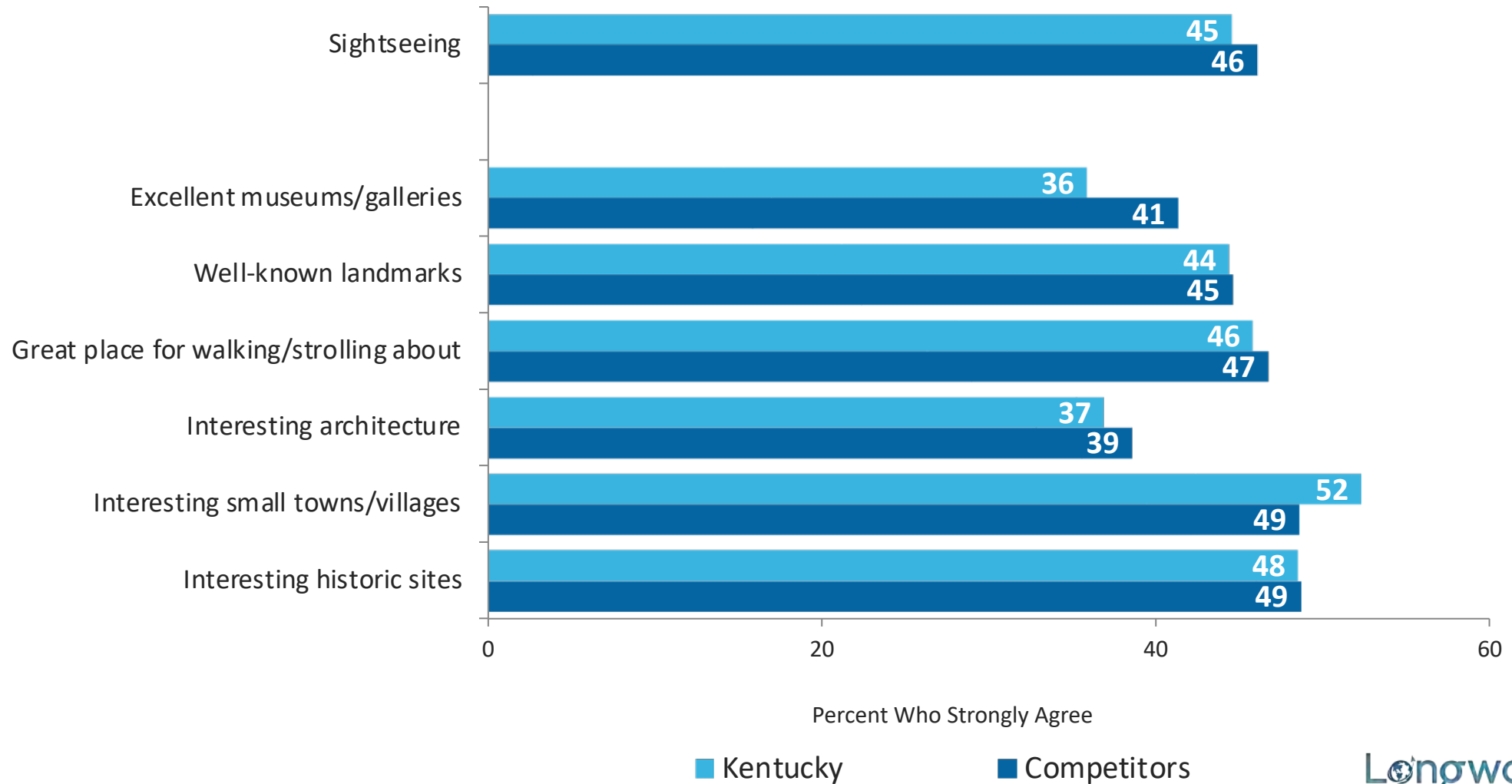
Kentucky's Image vs. Competition — Sightseeing

Base: New Markets



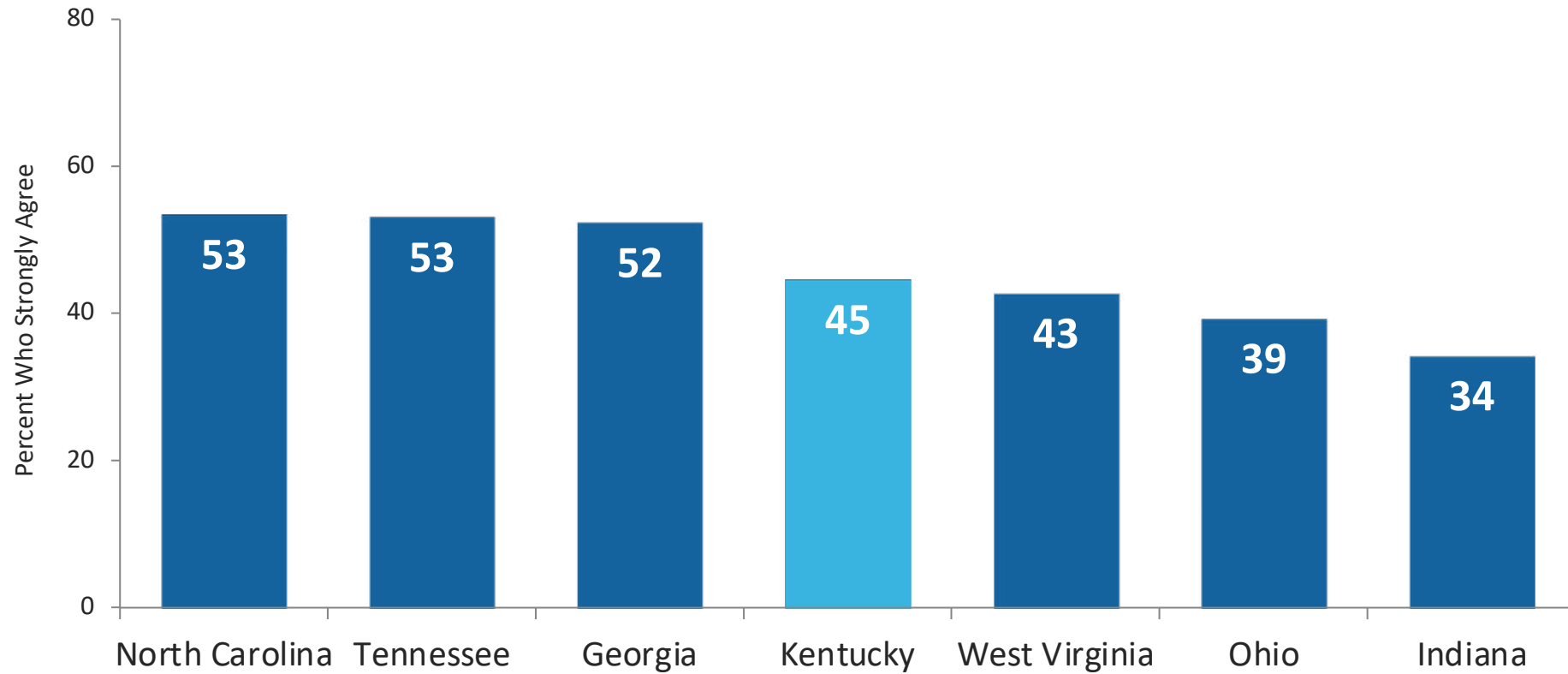
Kentucky's Image vs. Competition — Sightseeing (Cont'd)

Base: New Markets



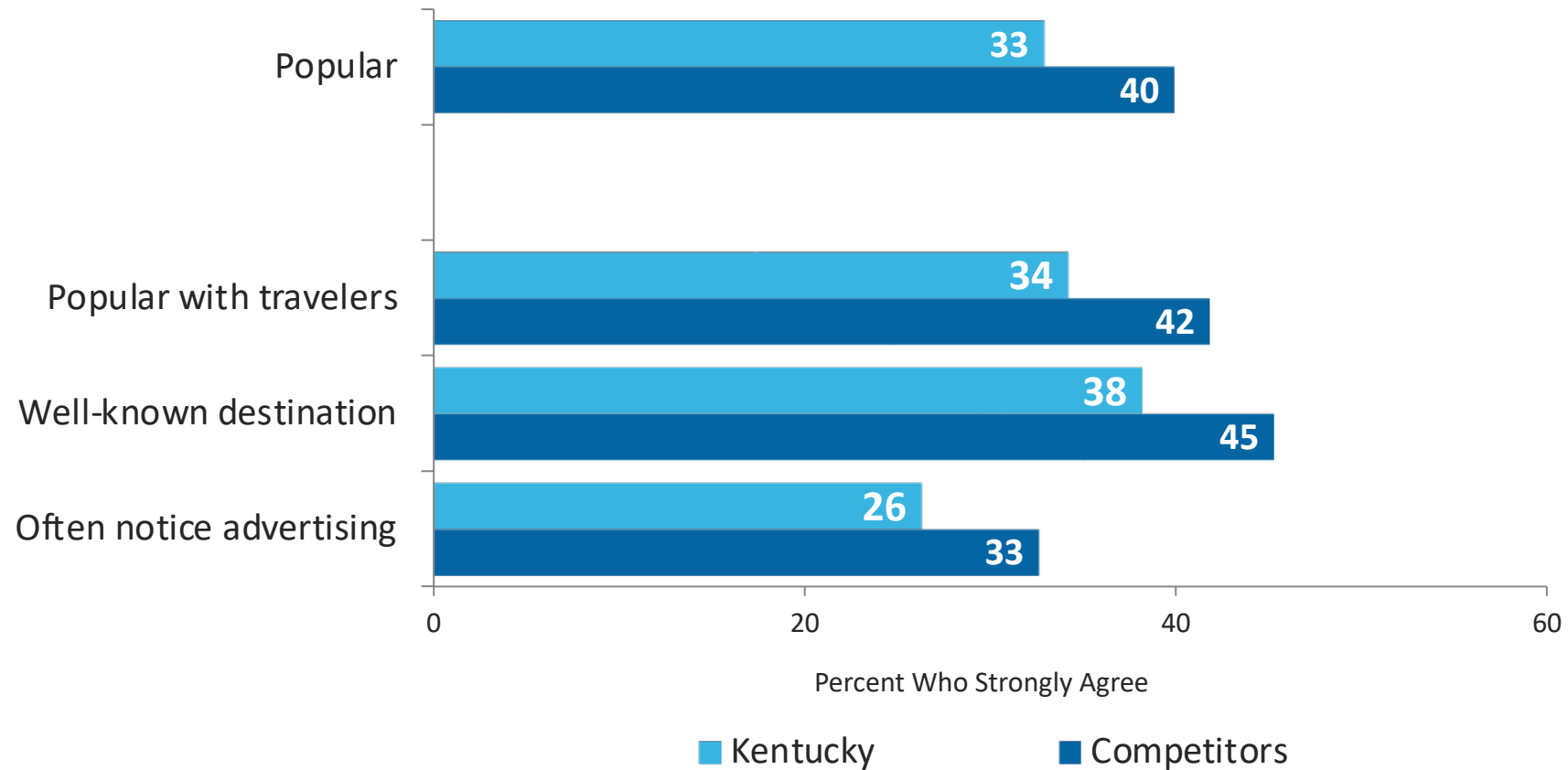
Kentucky's Image vs. Competition — Sightseeing

Base: New Markets



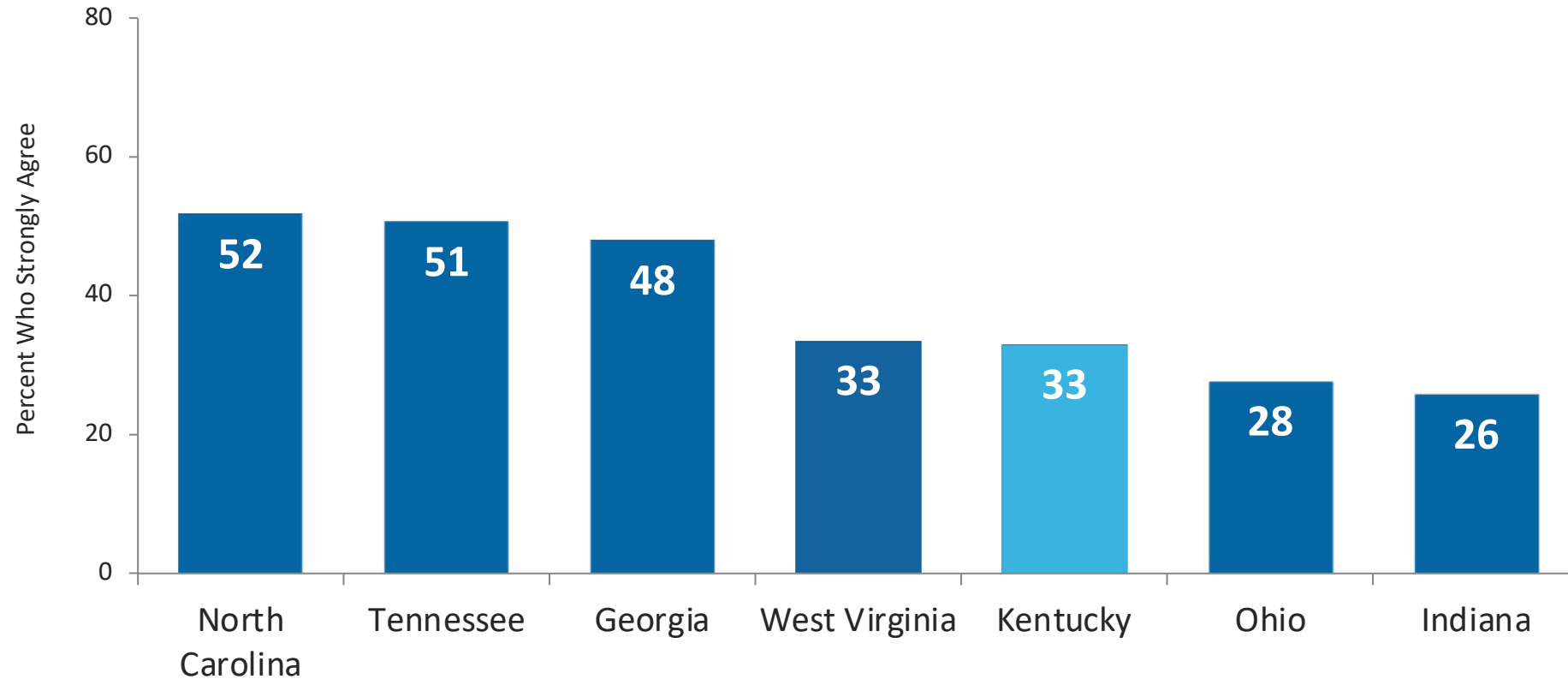
Kentucky's Image vs. Competition — Popular

Base: New Markets



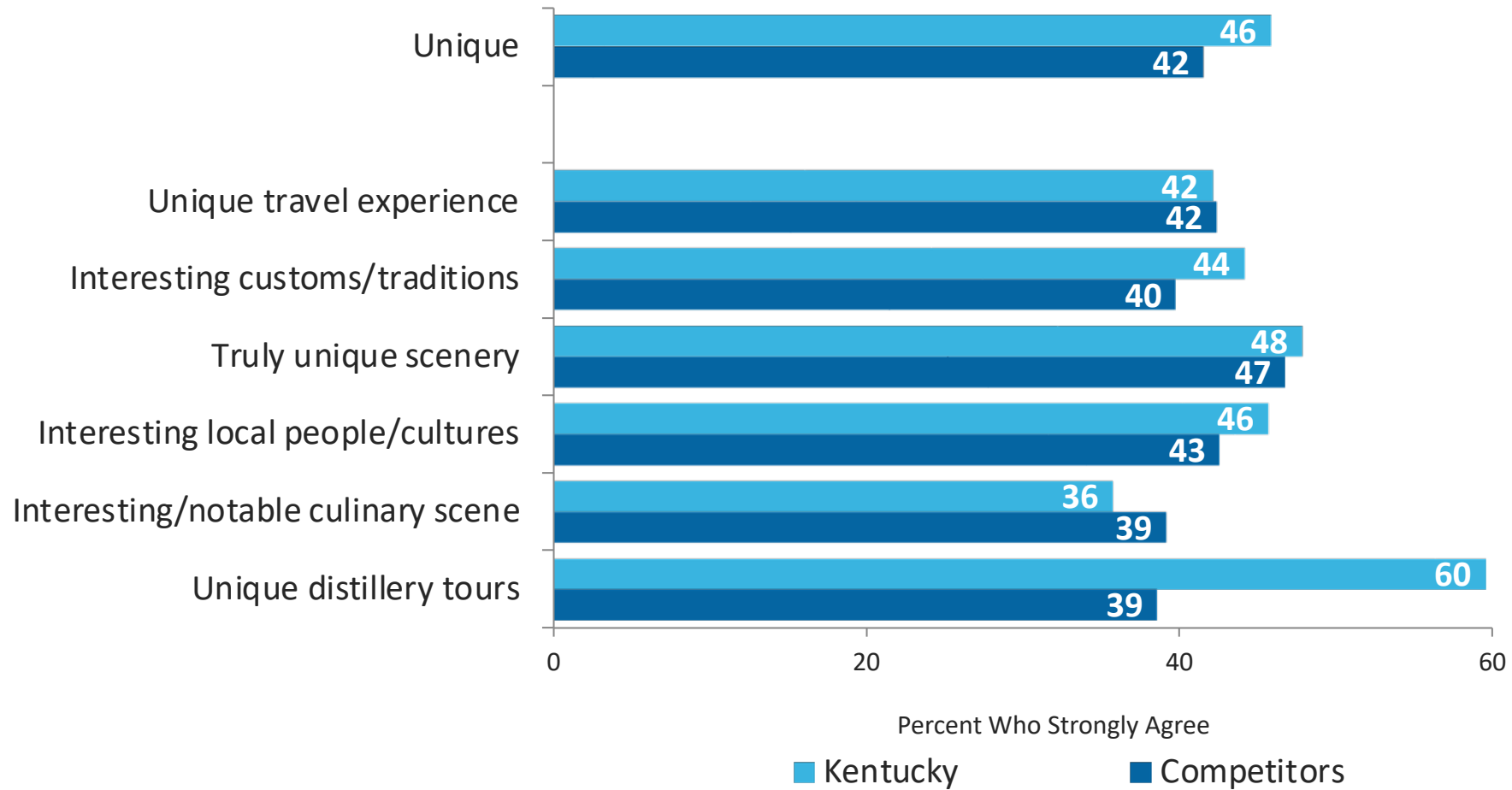
Kentucky's Image vs. Competition — Popular

Base: New Markets



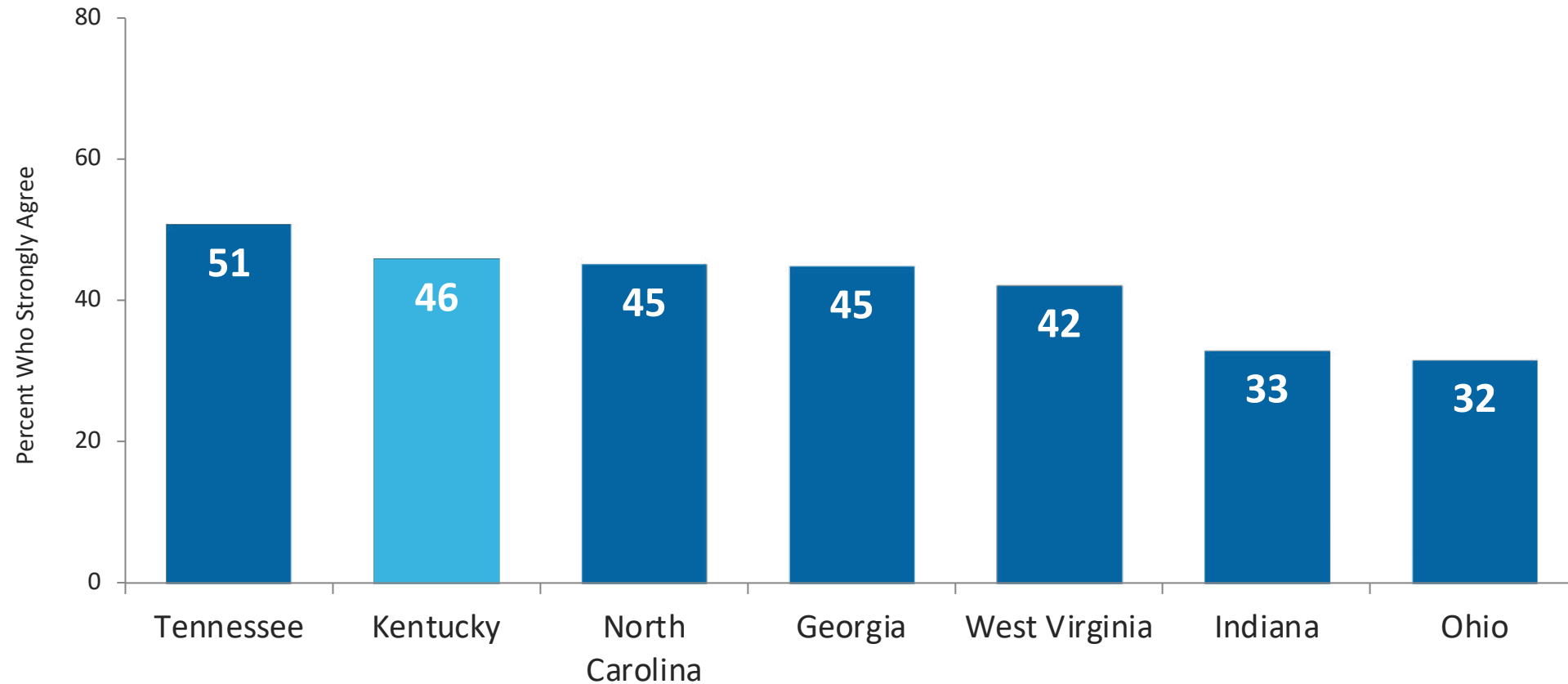
Kentucky's Image vs. Competition — Unique

Base: New Markets



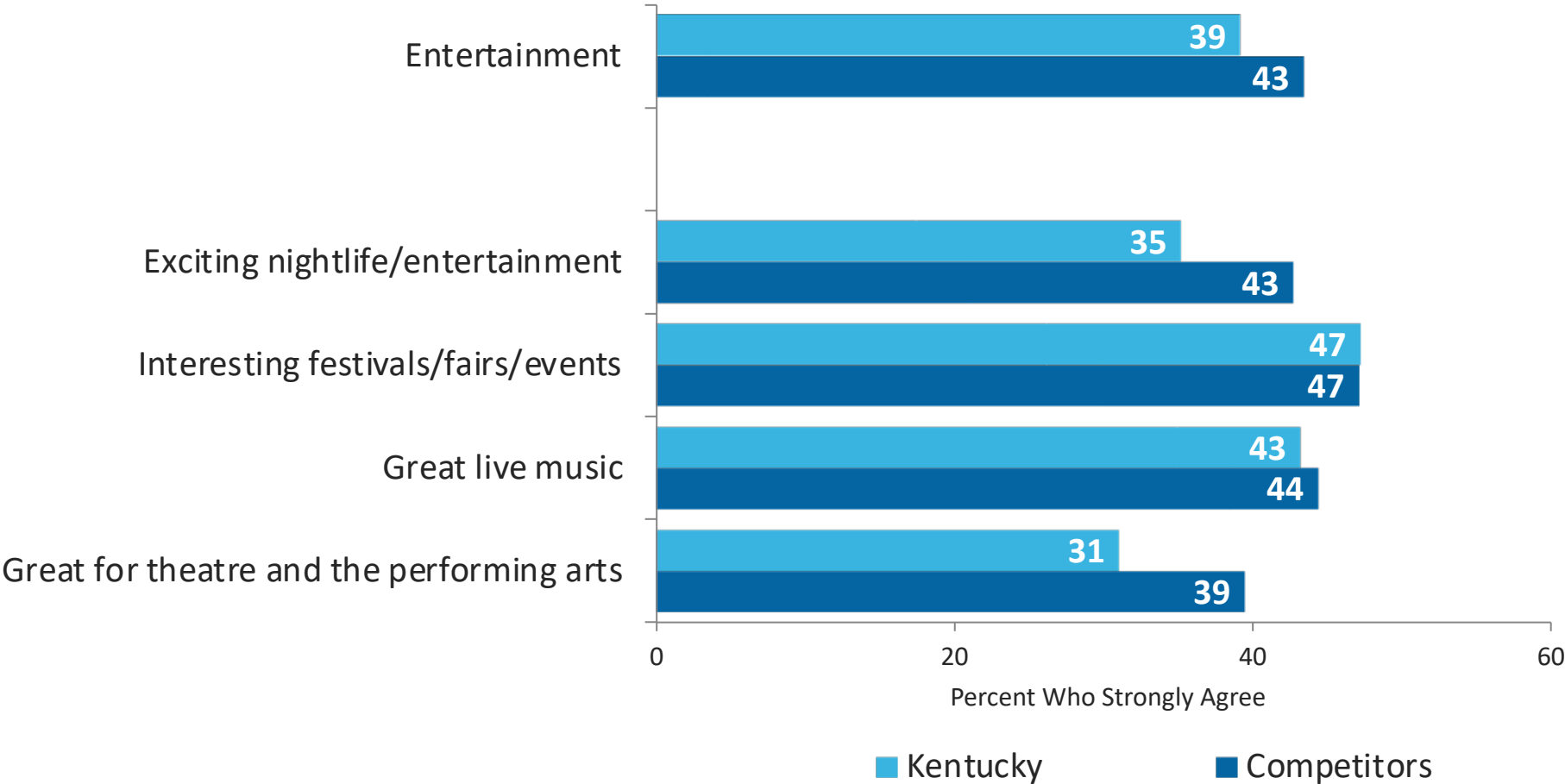
Kentucky's Image vs. Competition — Unique

Base: New Markets



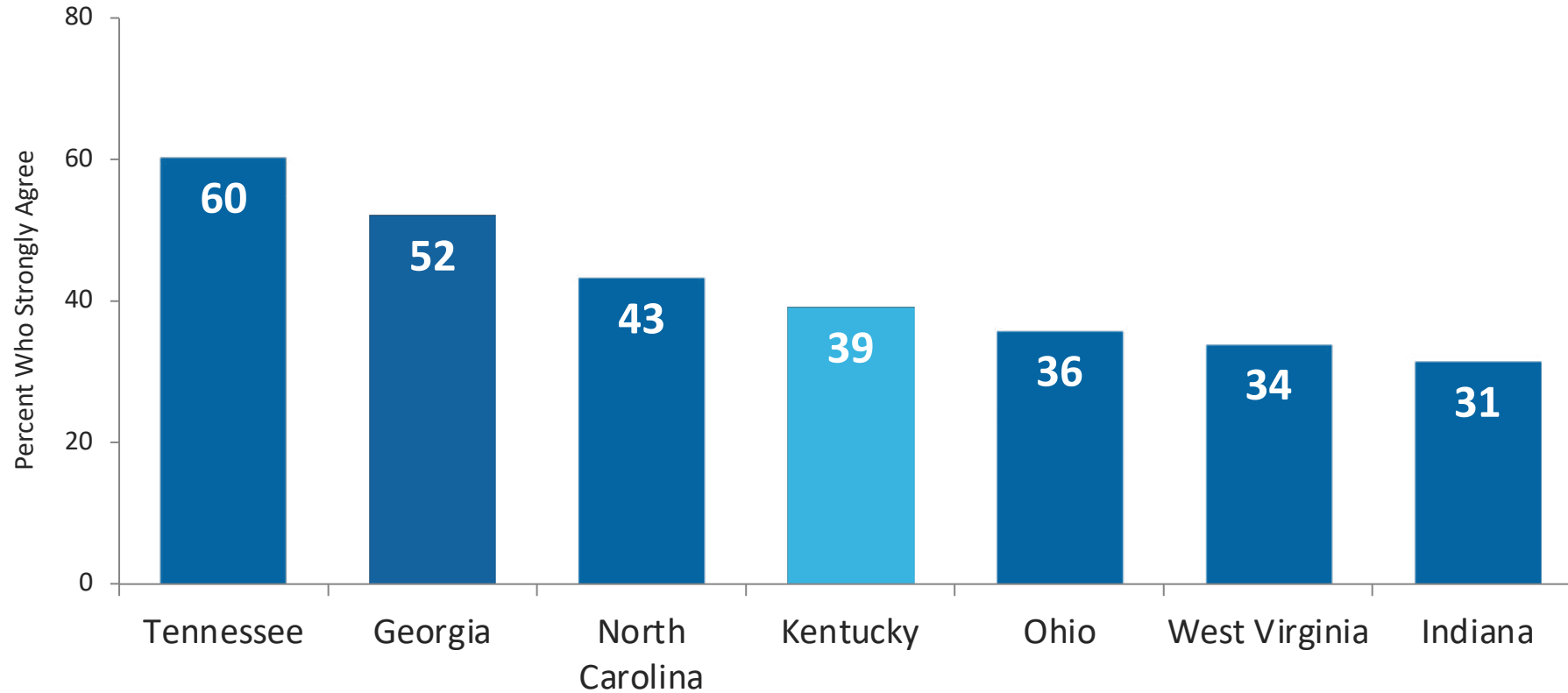
Kentucky's Image vs. Competition — Entertainment

Base: New Markets

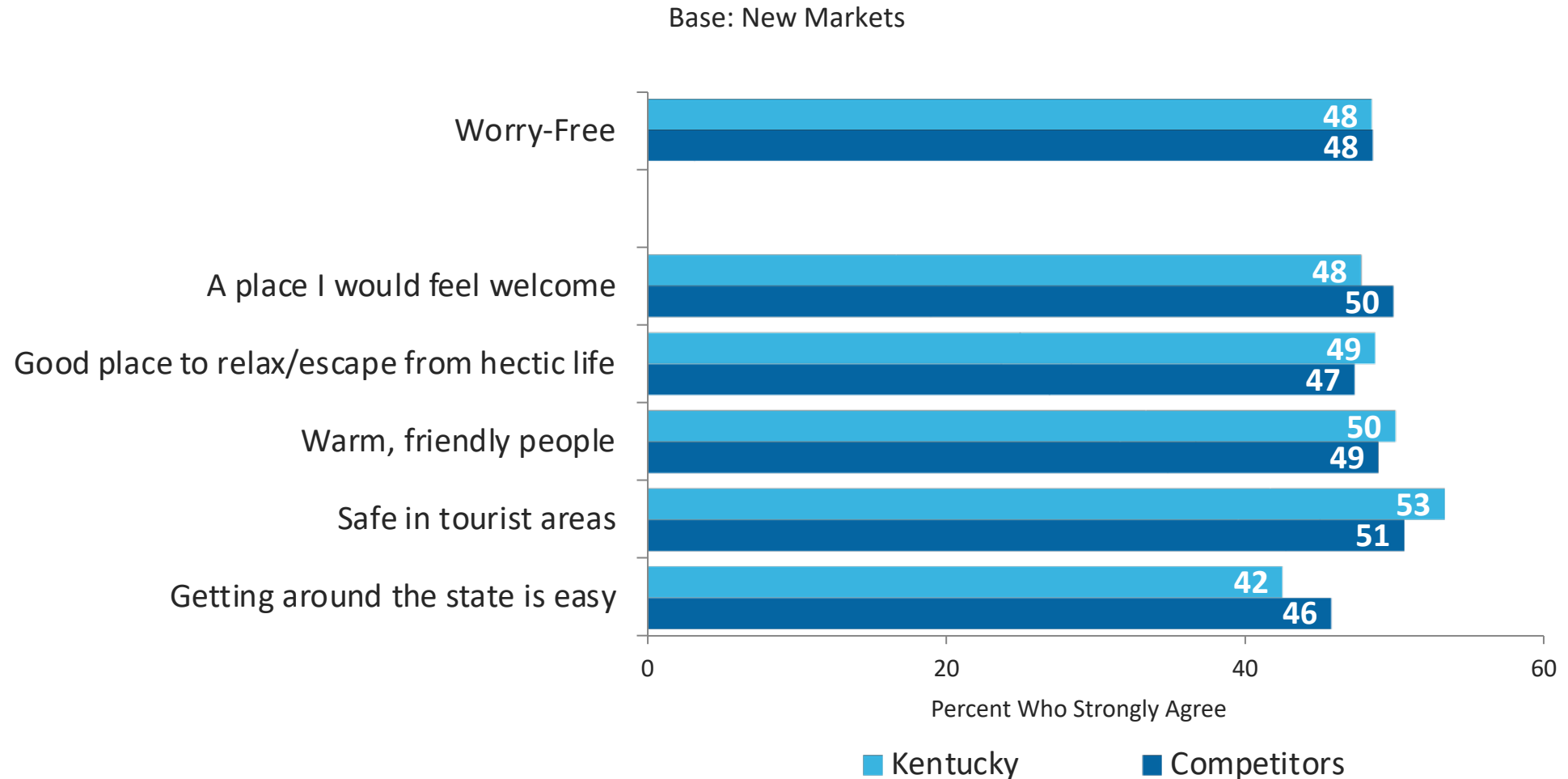


Kentucky's Image vs. Competition — Entertainment

Base: New Markets

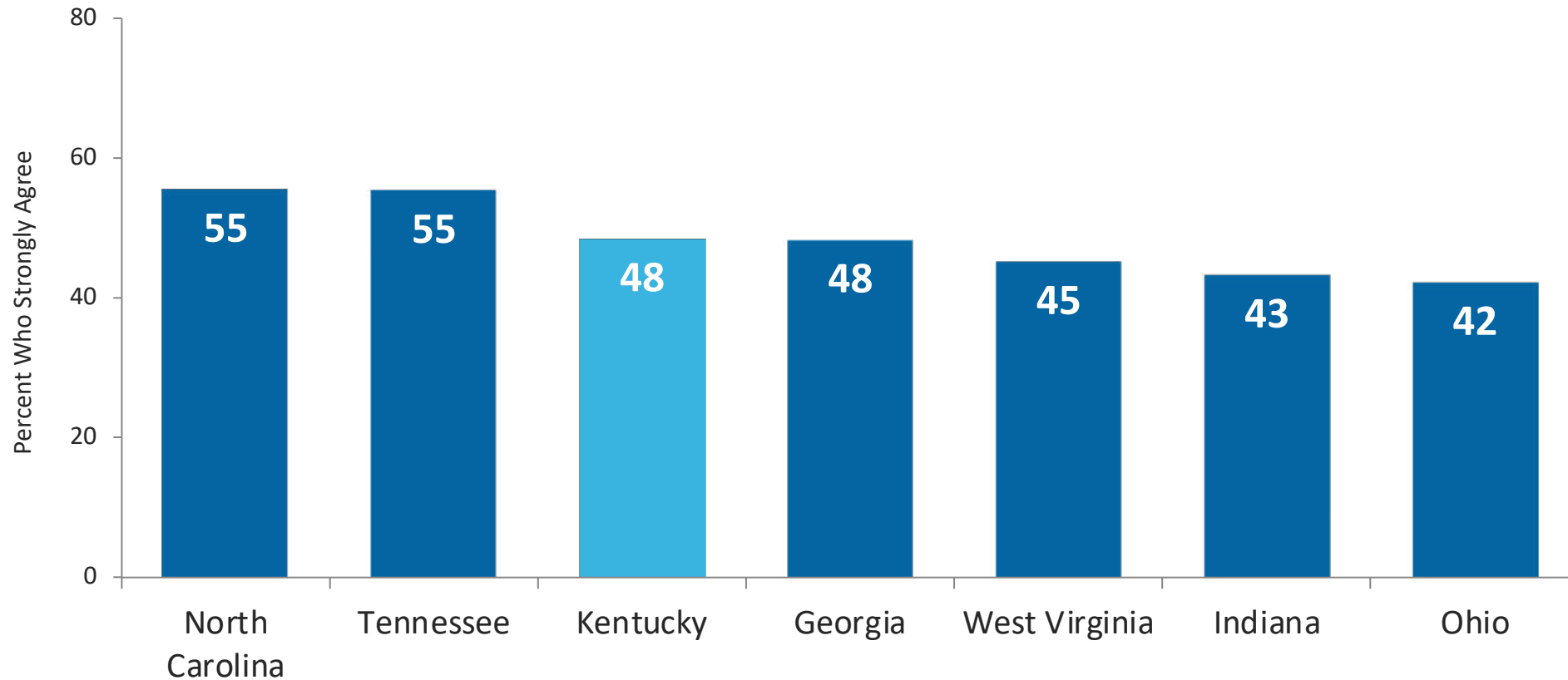


Kentucky's Image vs. Competition — Worry-Free



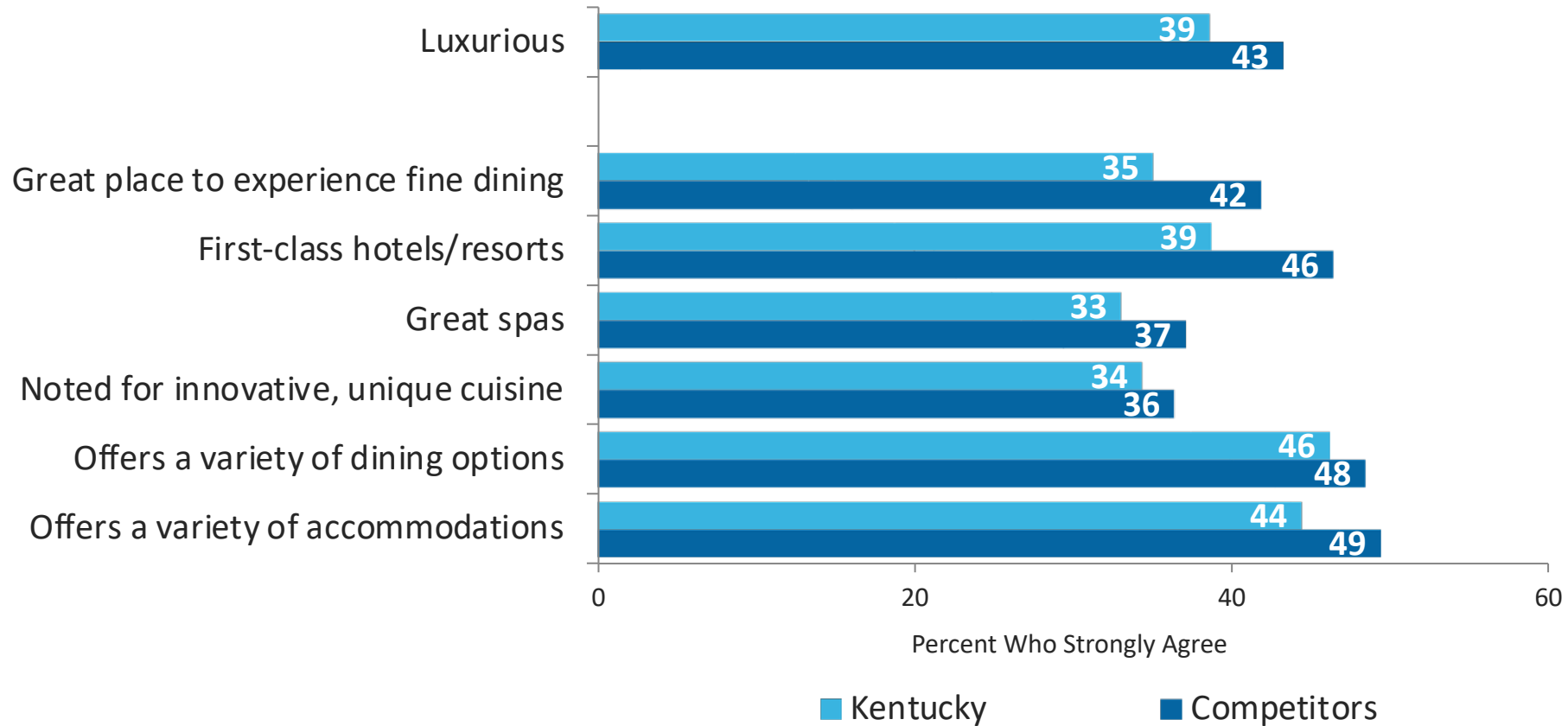
Kentucky's Image vs. Competition — Worry-Free

Base: New Markets



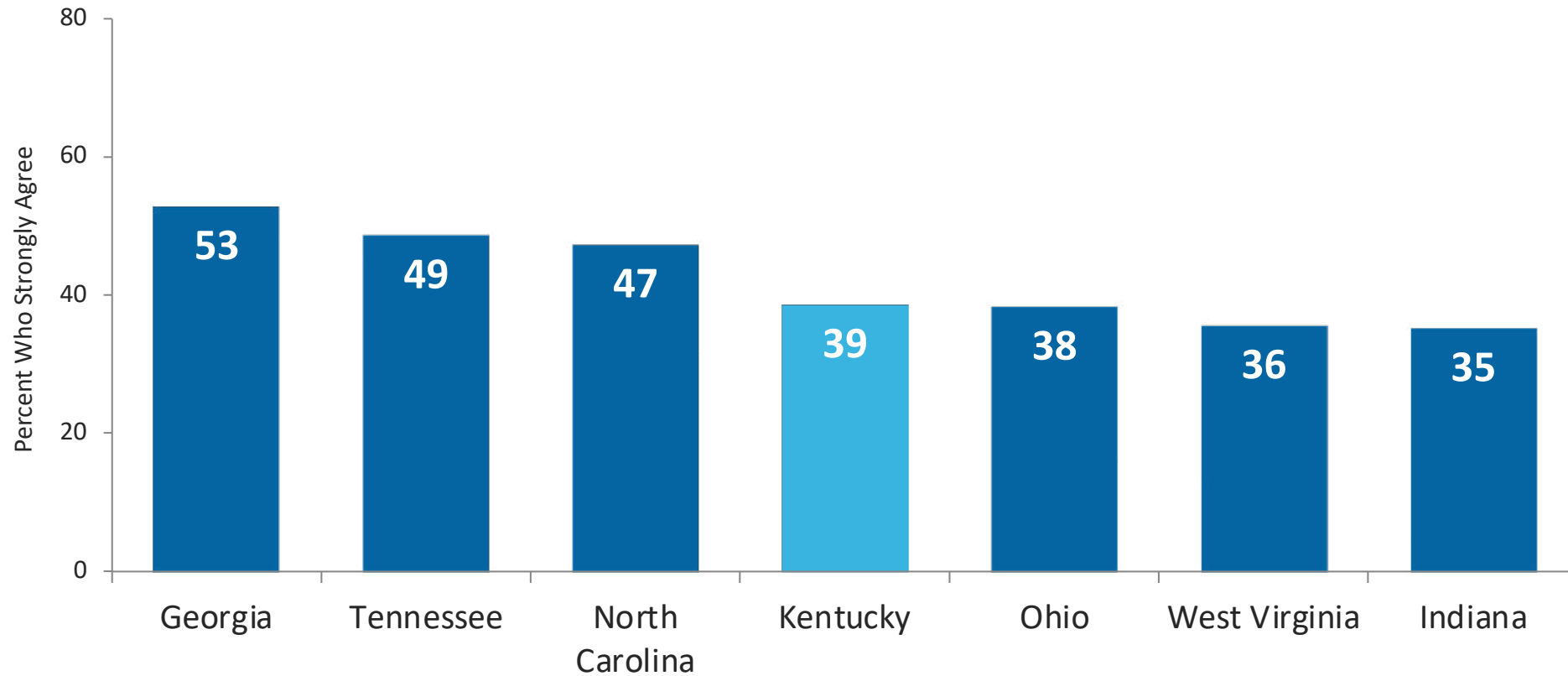
Kentucky's Image vs. Competition — Luxurious

Base: New Markets



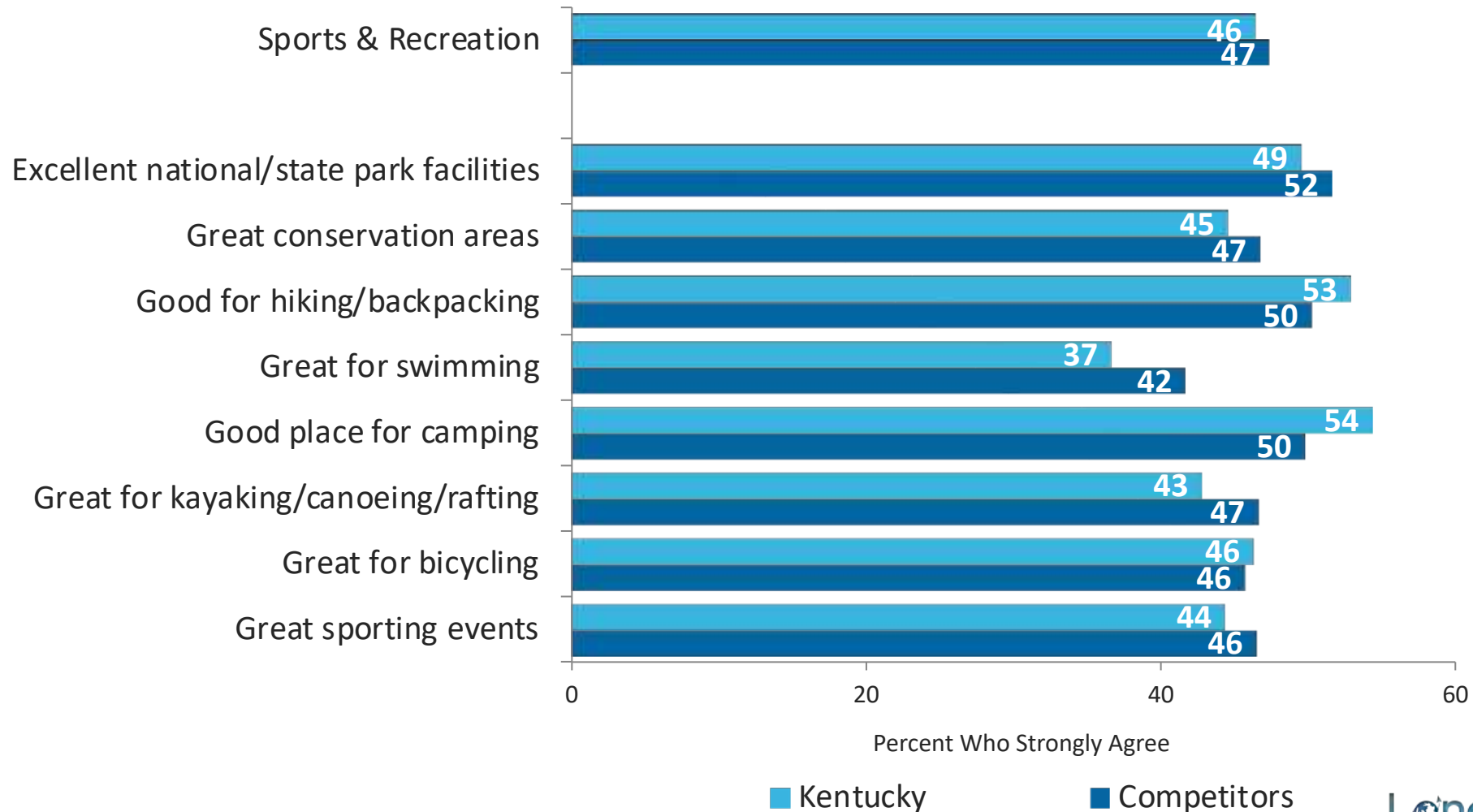
Kentucky's Image vs. Competition — Luxurious

Base: New Markets



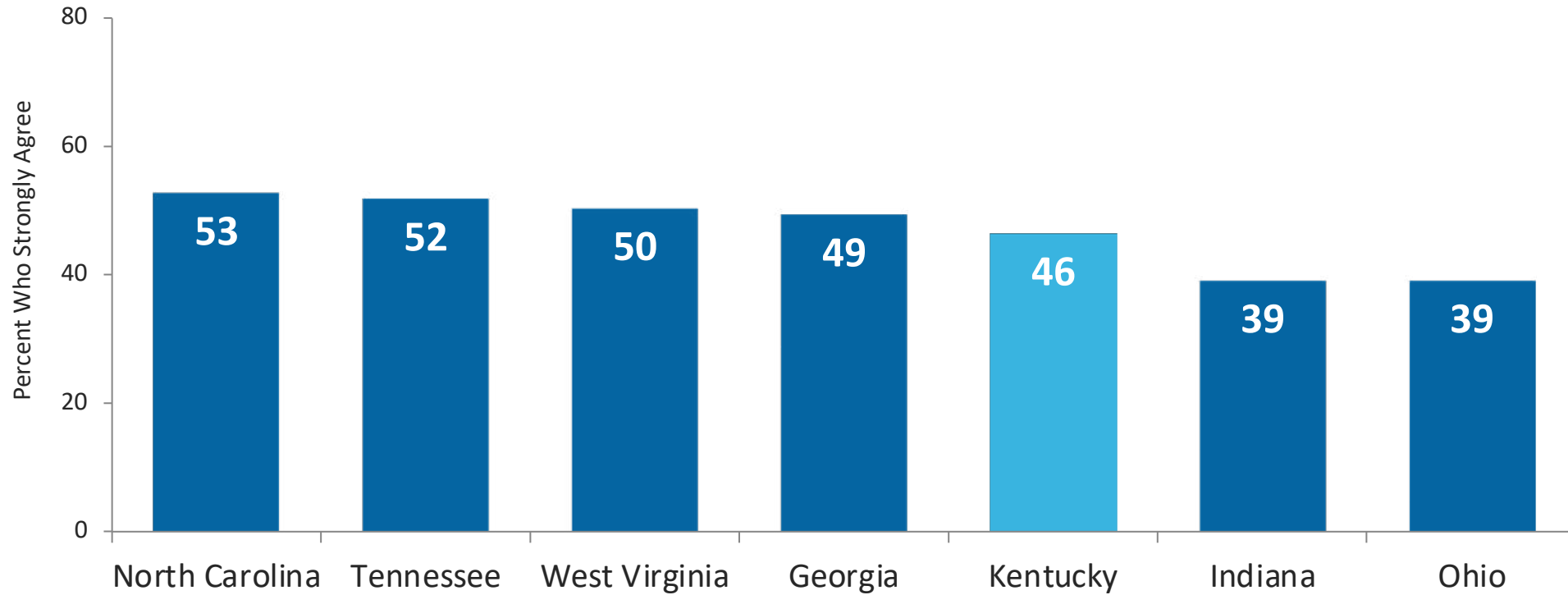
Kentucky's Image vs. Competition — Sports & Recreation

Base: New Markets



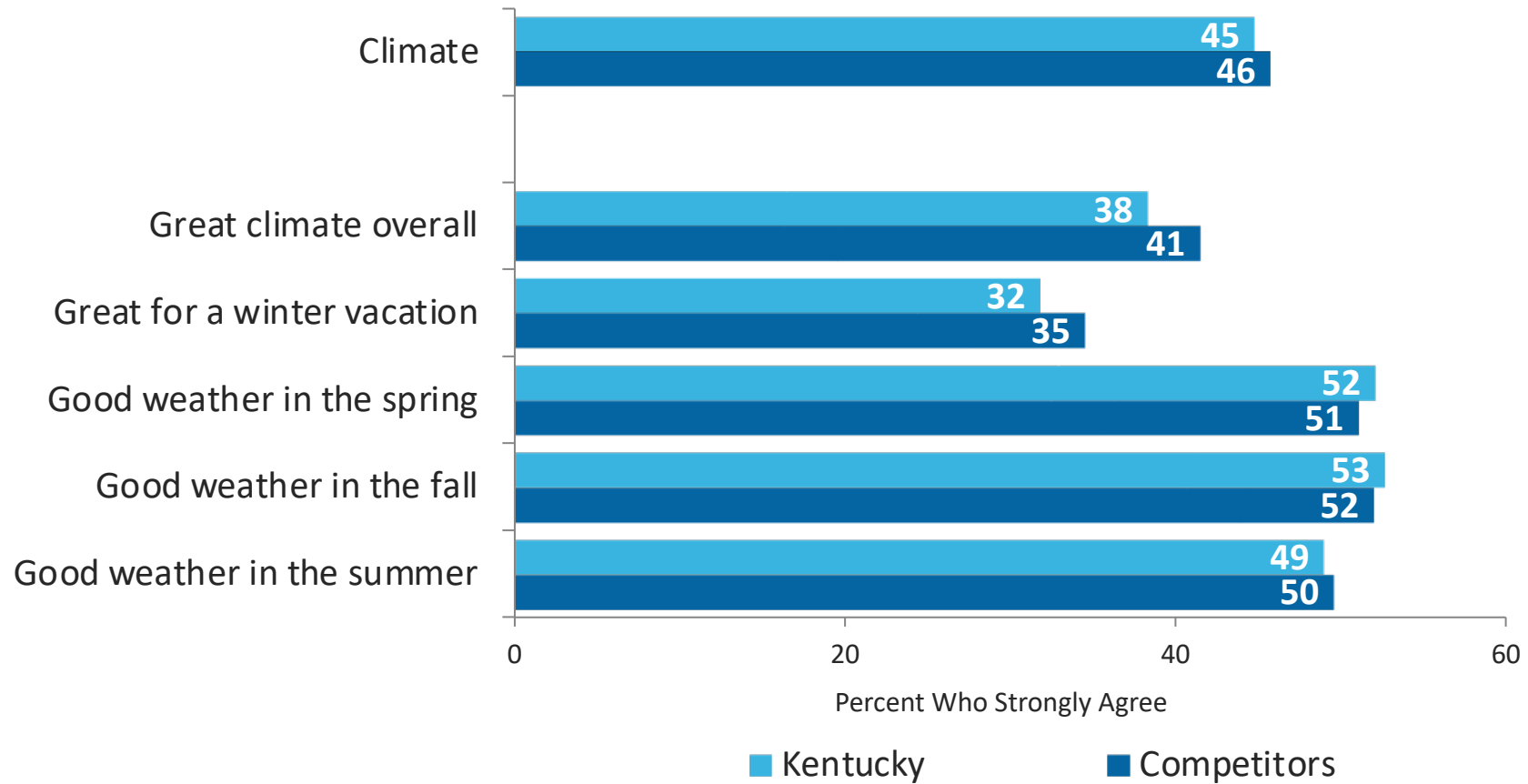
Kentucky's Image vs. Competition — Sports & Recreation

Base: New Markets



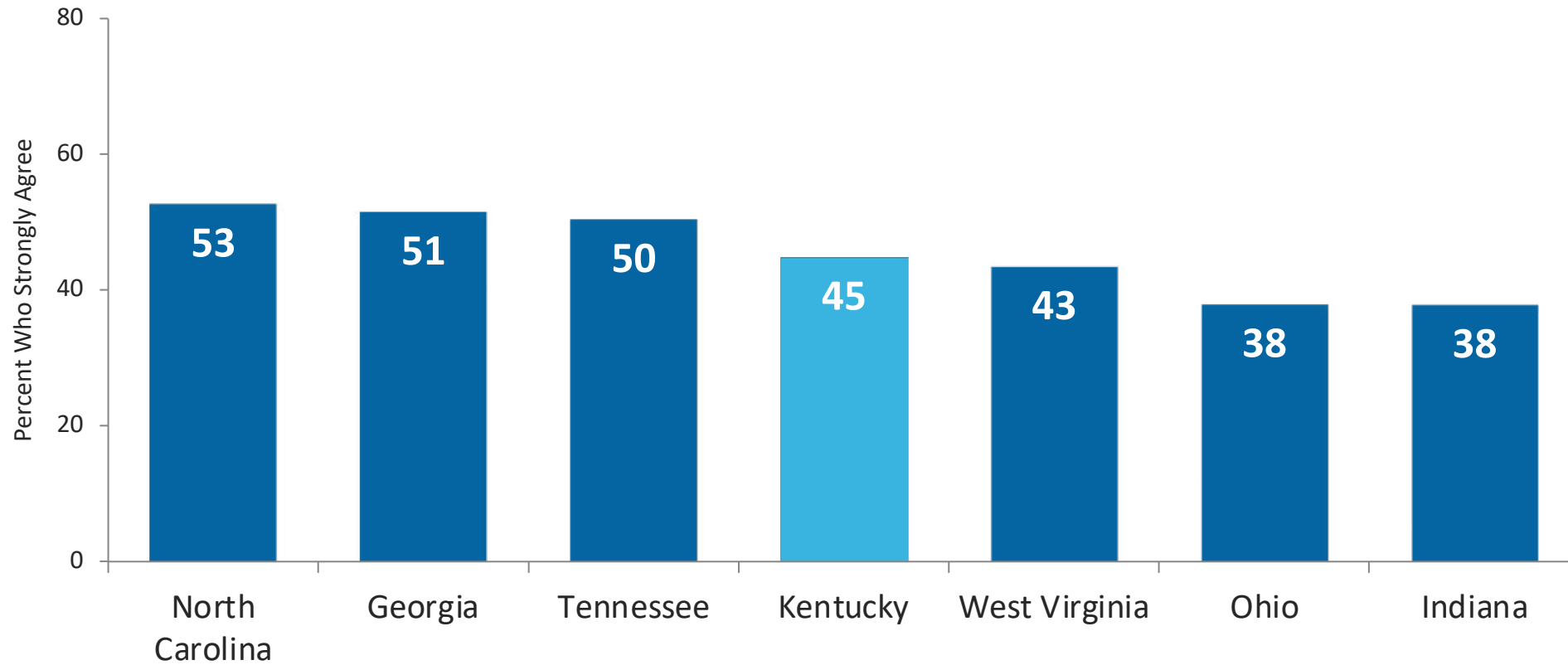
Kentucky's Image vs. Competition — Climate

Base: New Markets



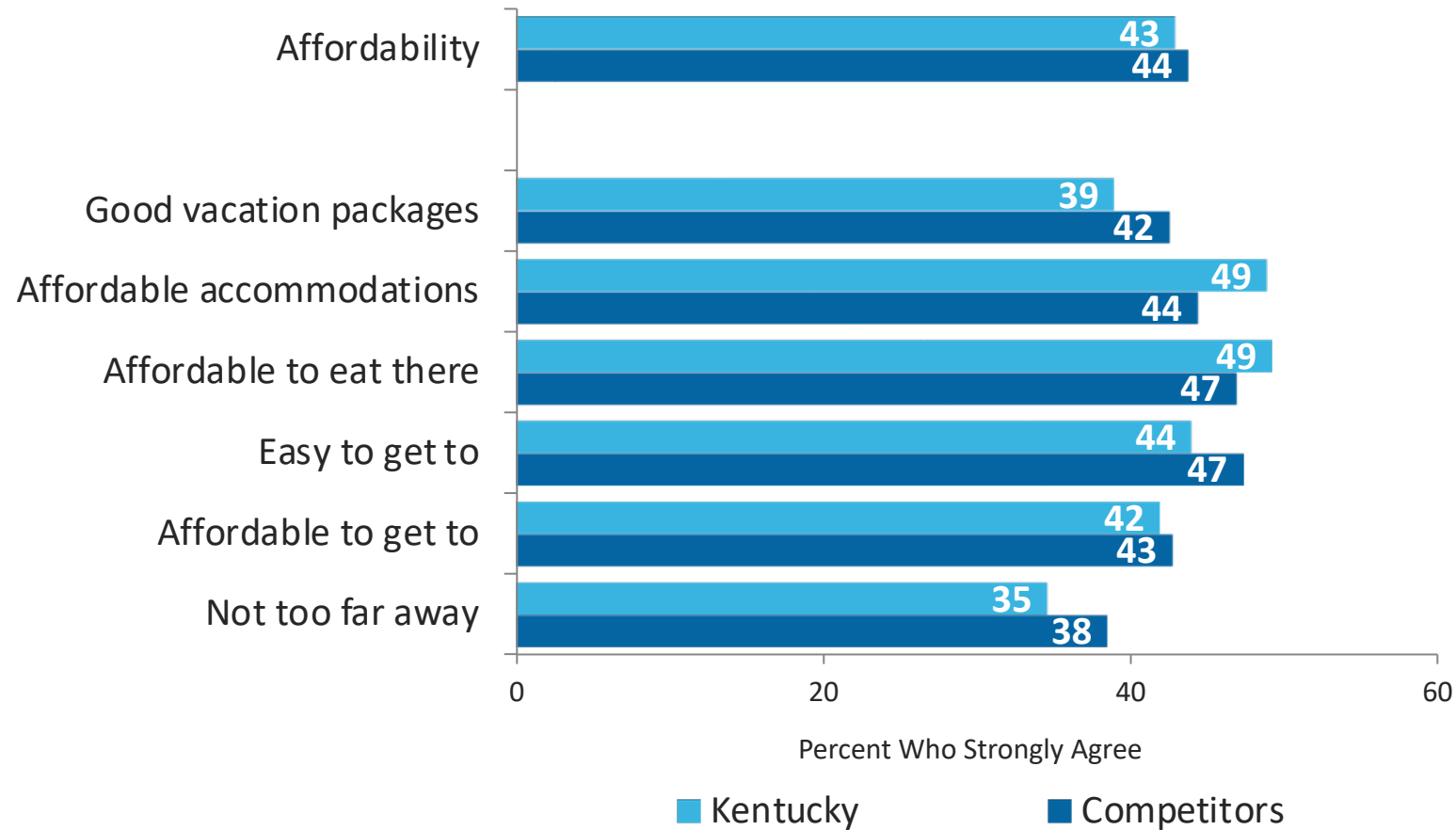
Kentucky's Image vs. Competition — Climate

Base: New Markets



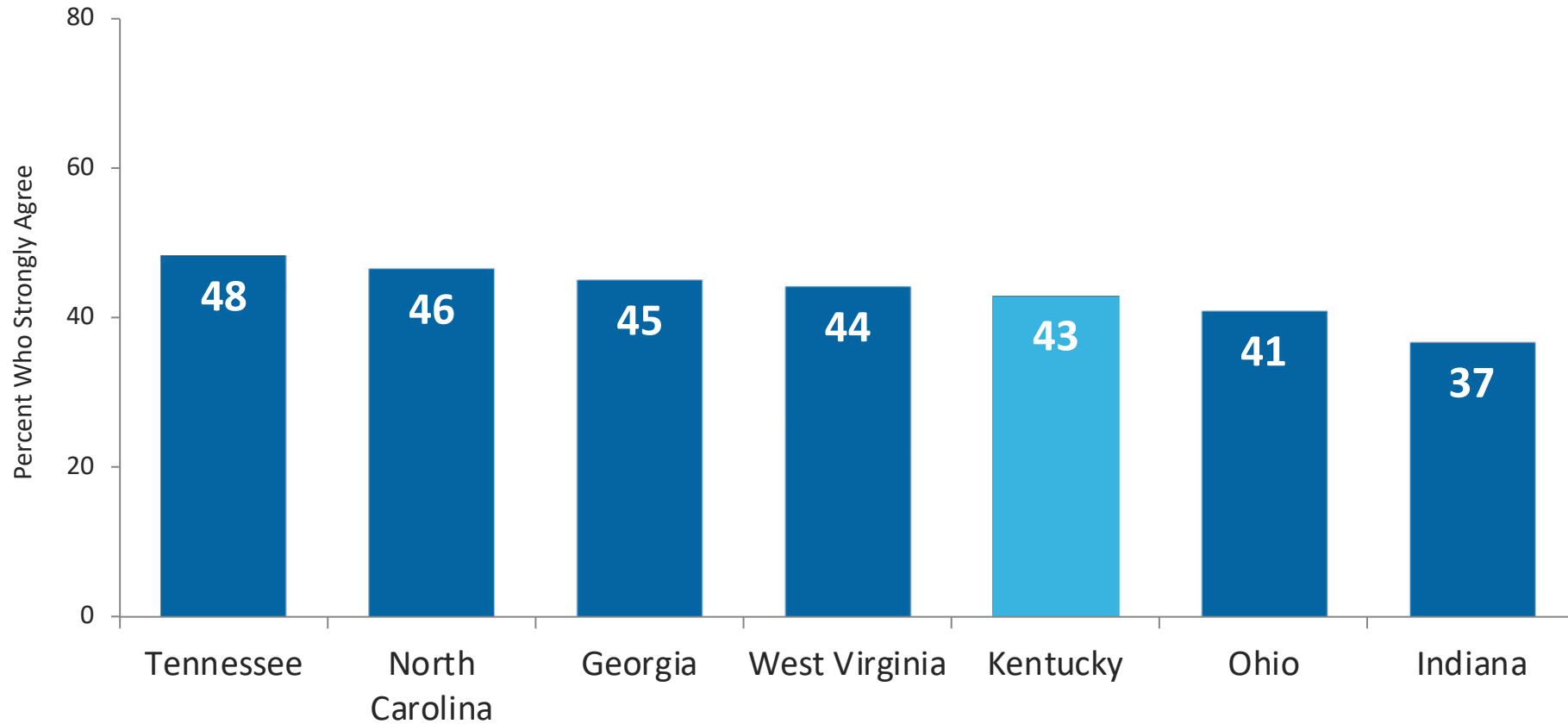
Kentucky's Image vs. Competition — Affordability

Base: New Markets



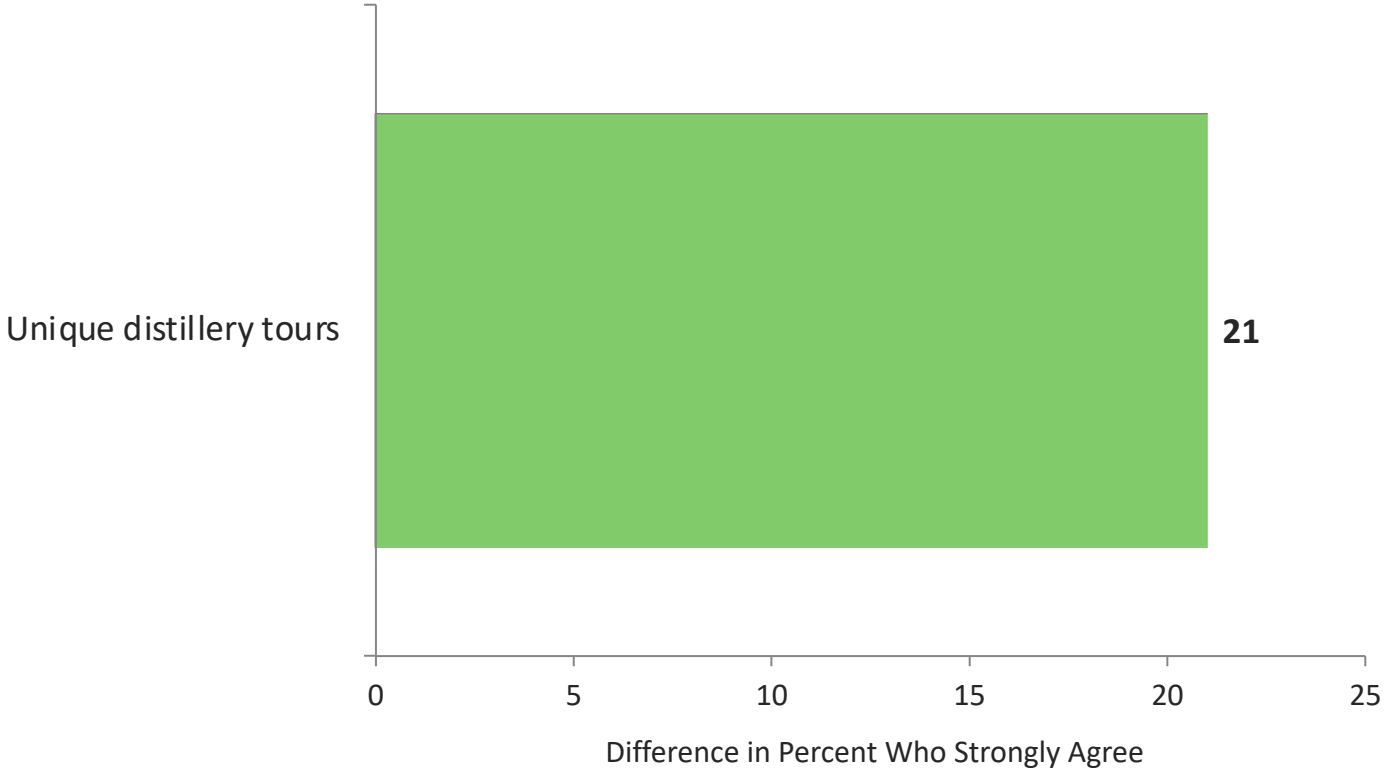
Kentucky's Image vs. Competition — Affordability

Base: New Markets



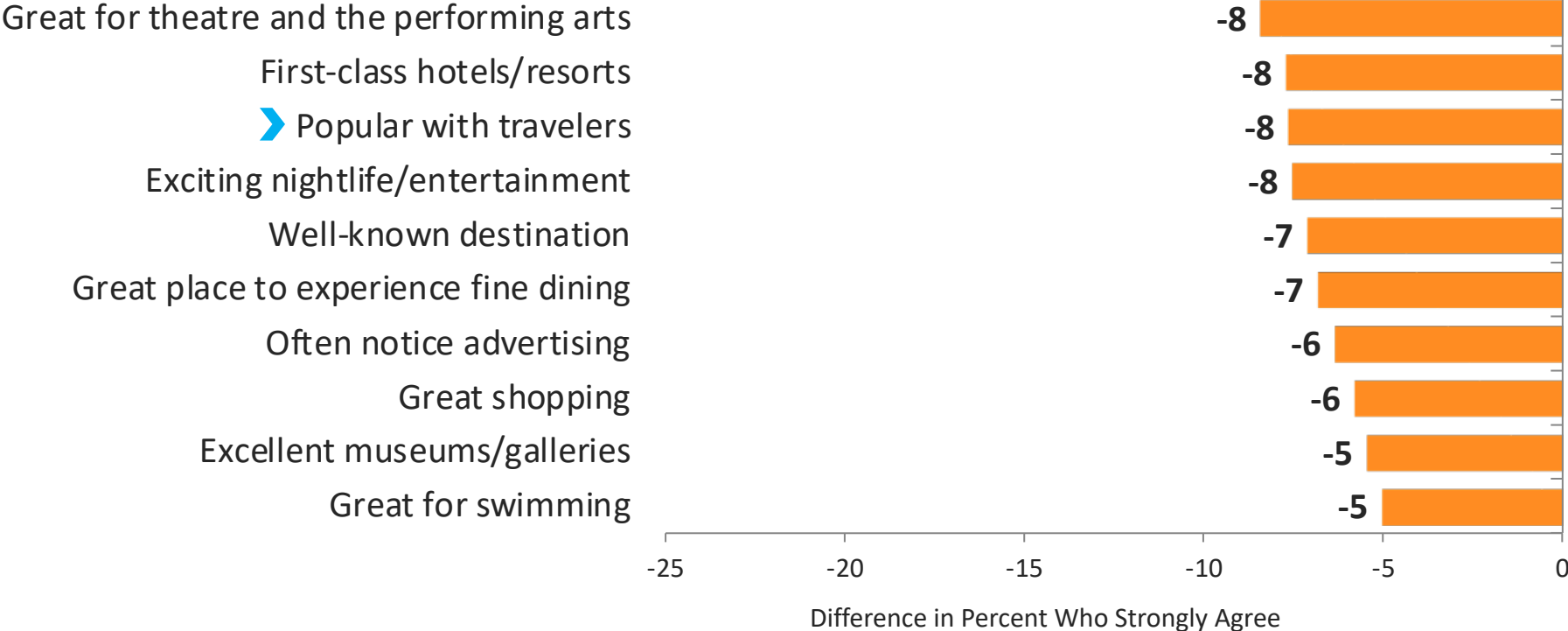
Kentucky's Image Strengths vs. Competition

Base: New Markets



Kentucky's Image Weaknesses vs. Competition

Base: New Markets



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



Halo Effect on Economic Development Image

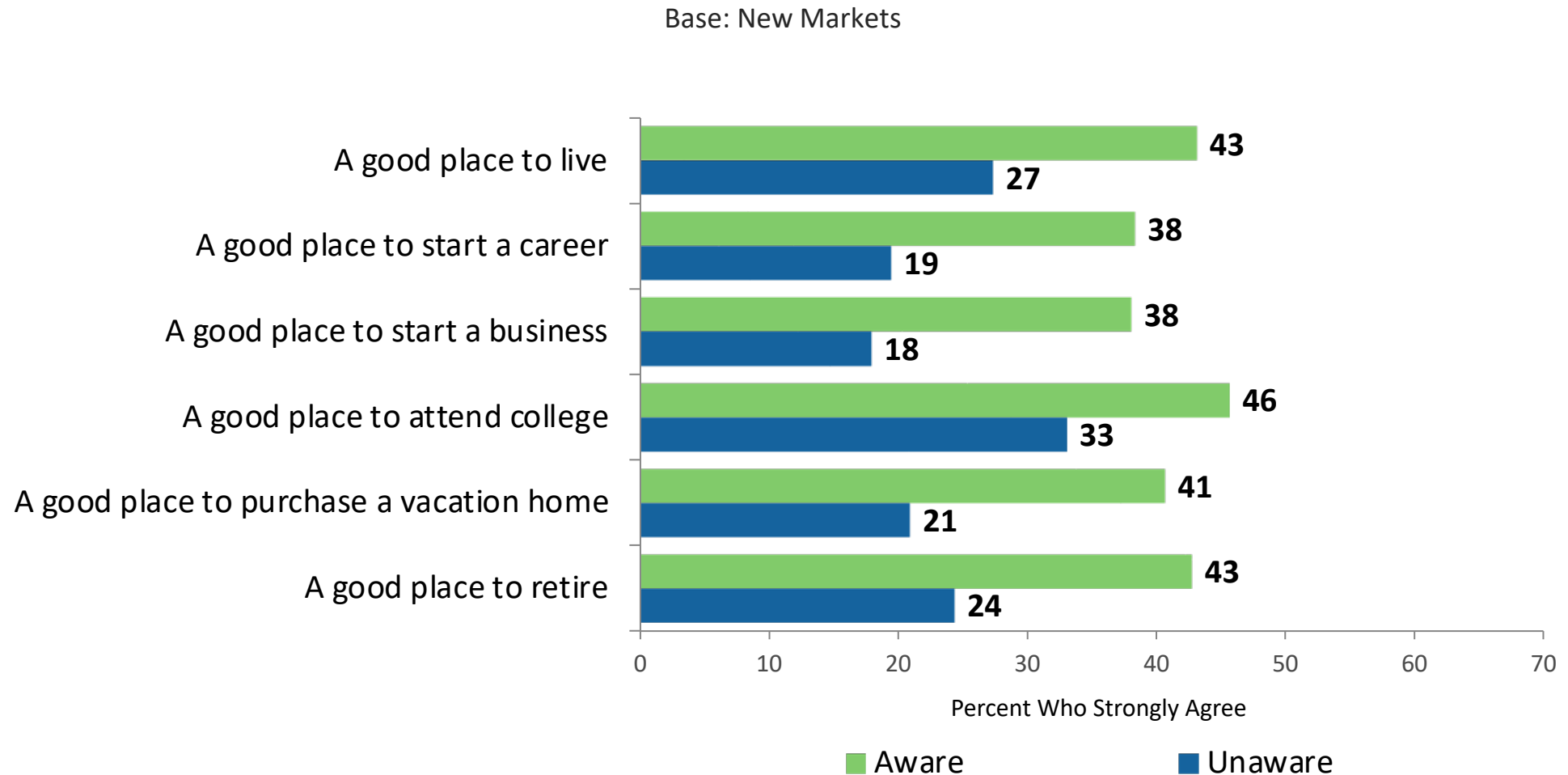
Halo Effect Analysis

- 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 new 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.

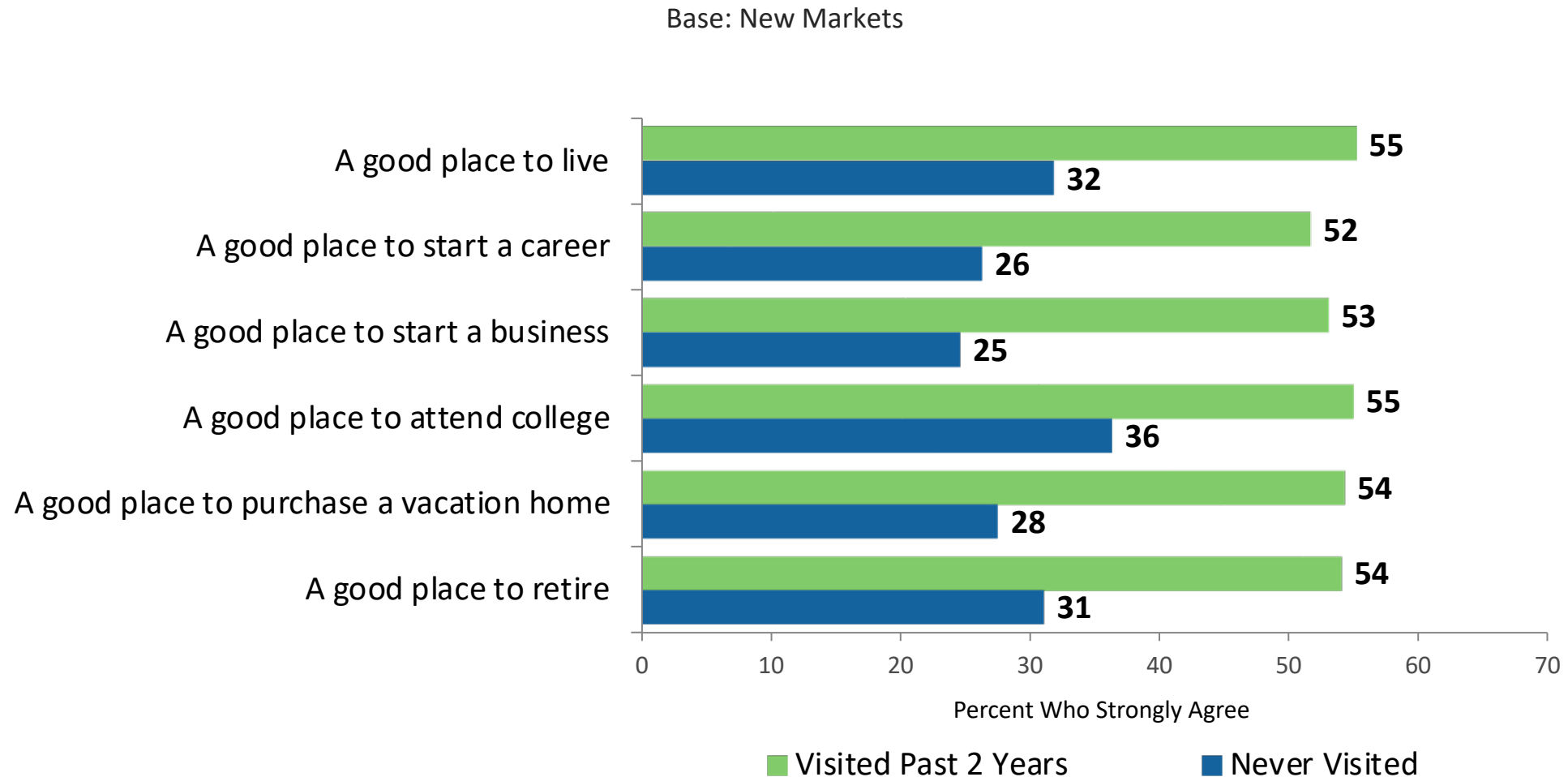
Halo Effect Analysis (Cont.)

- 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.

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

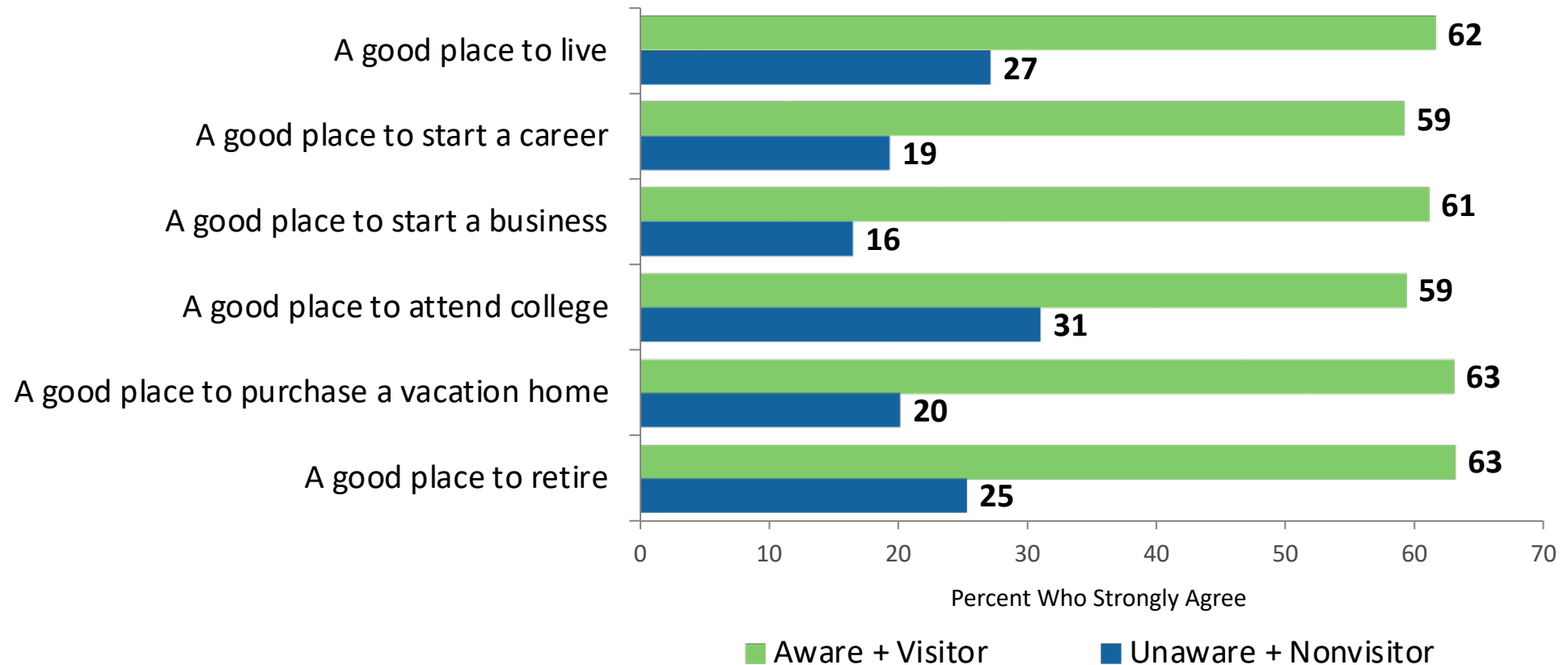


Impact of *Visitation* on Kentucky's Economic Development Image



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

Base: New Markets





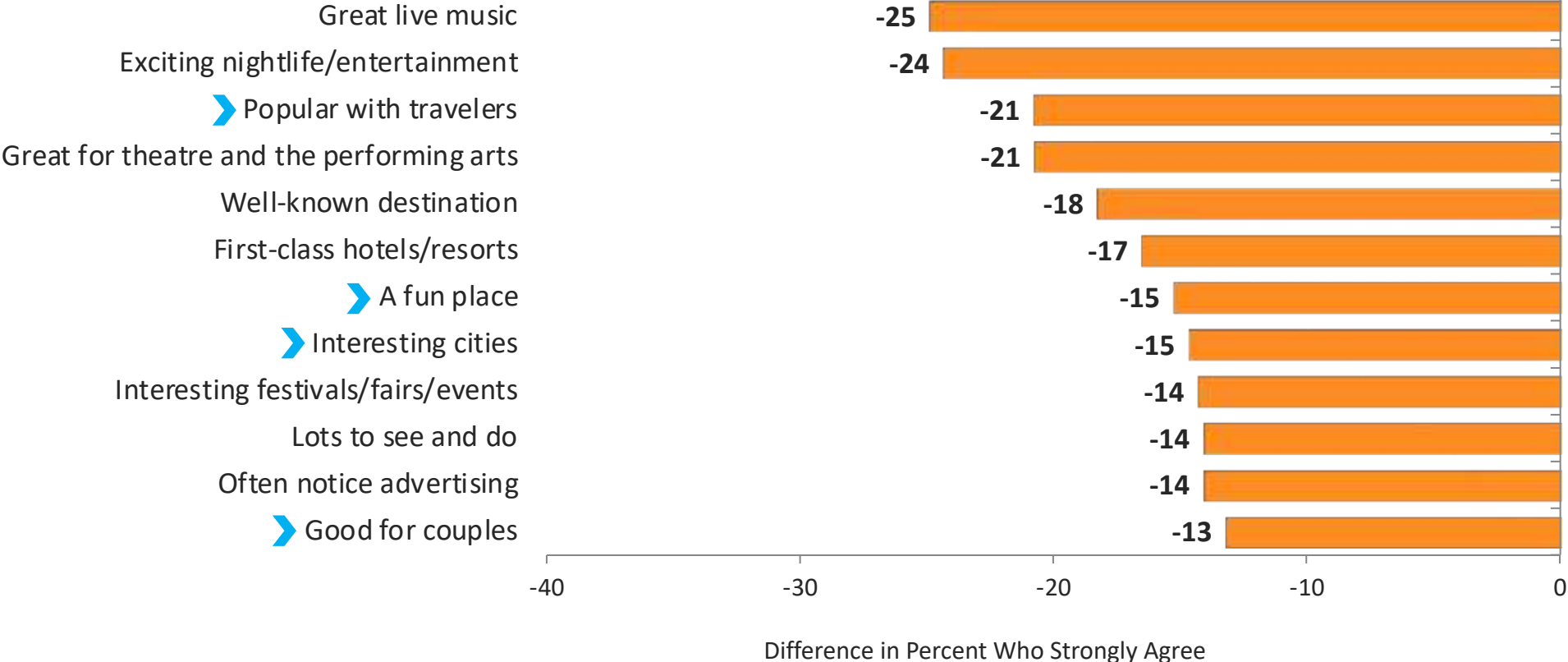
**Appendix: Kentucky's
Image Strengths &
Weaknesses vs.
Individual
Competitors**

Kentucky's Image Strengths vs. Tennessee

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

Kentucky's Image Weaknesses vs. Tennessee

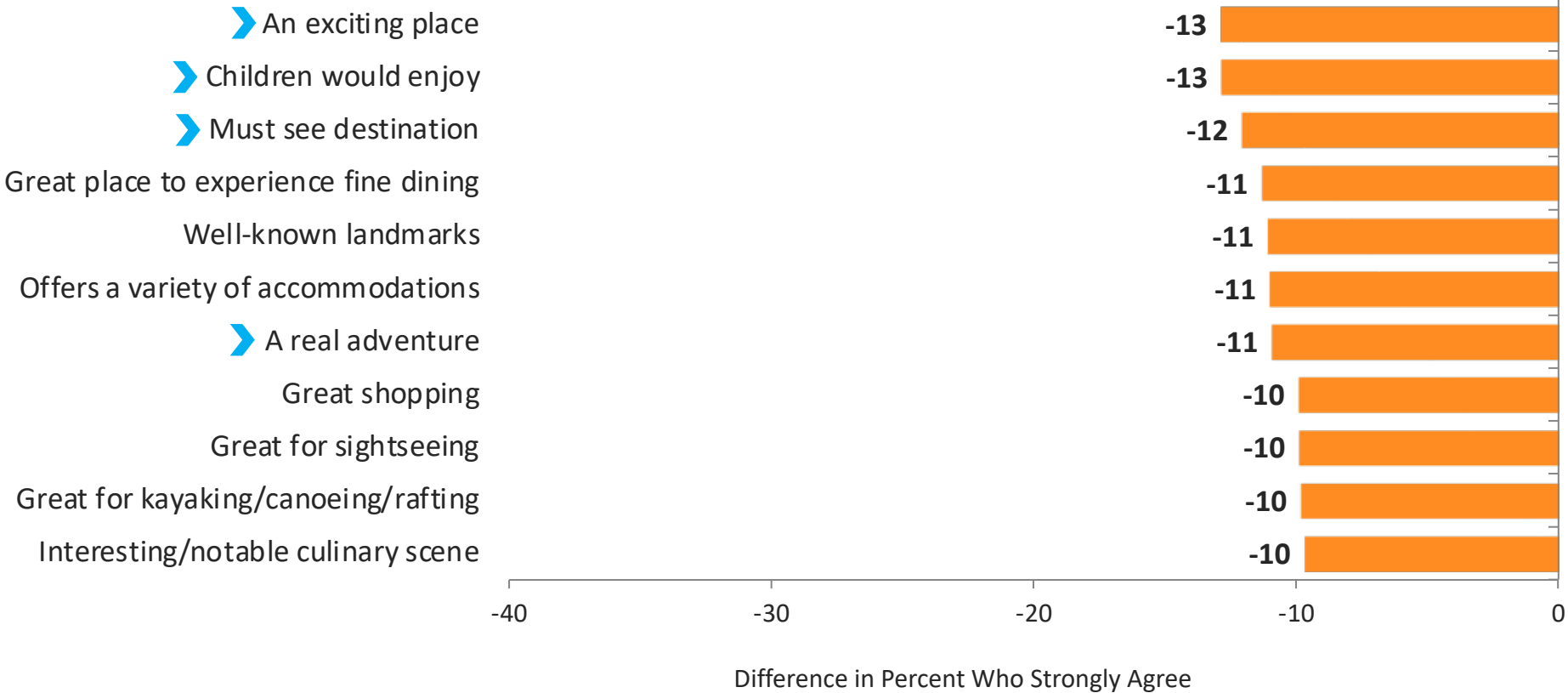
Base: New Markets



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

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

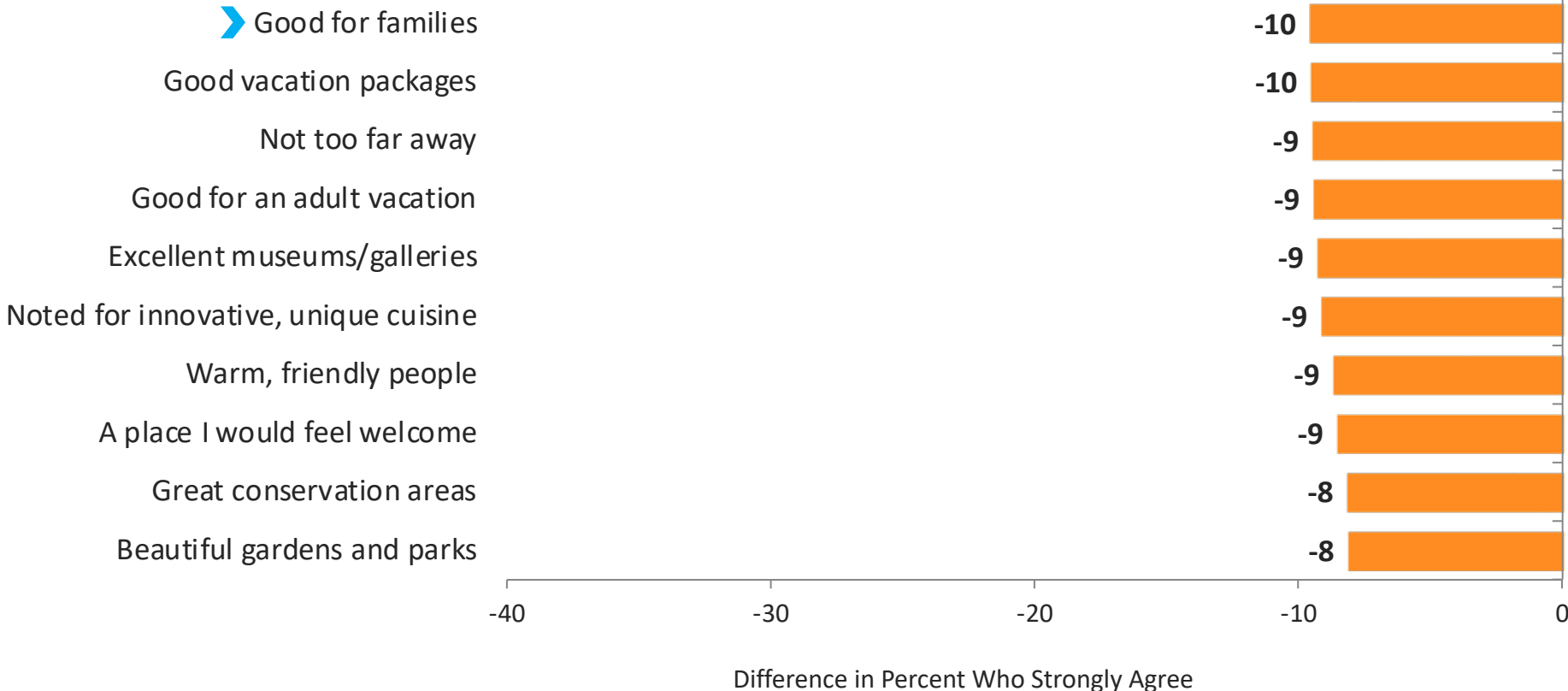
Base: New Markets



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

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

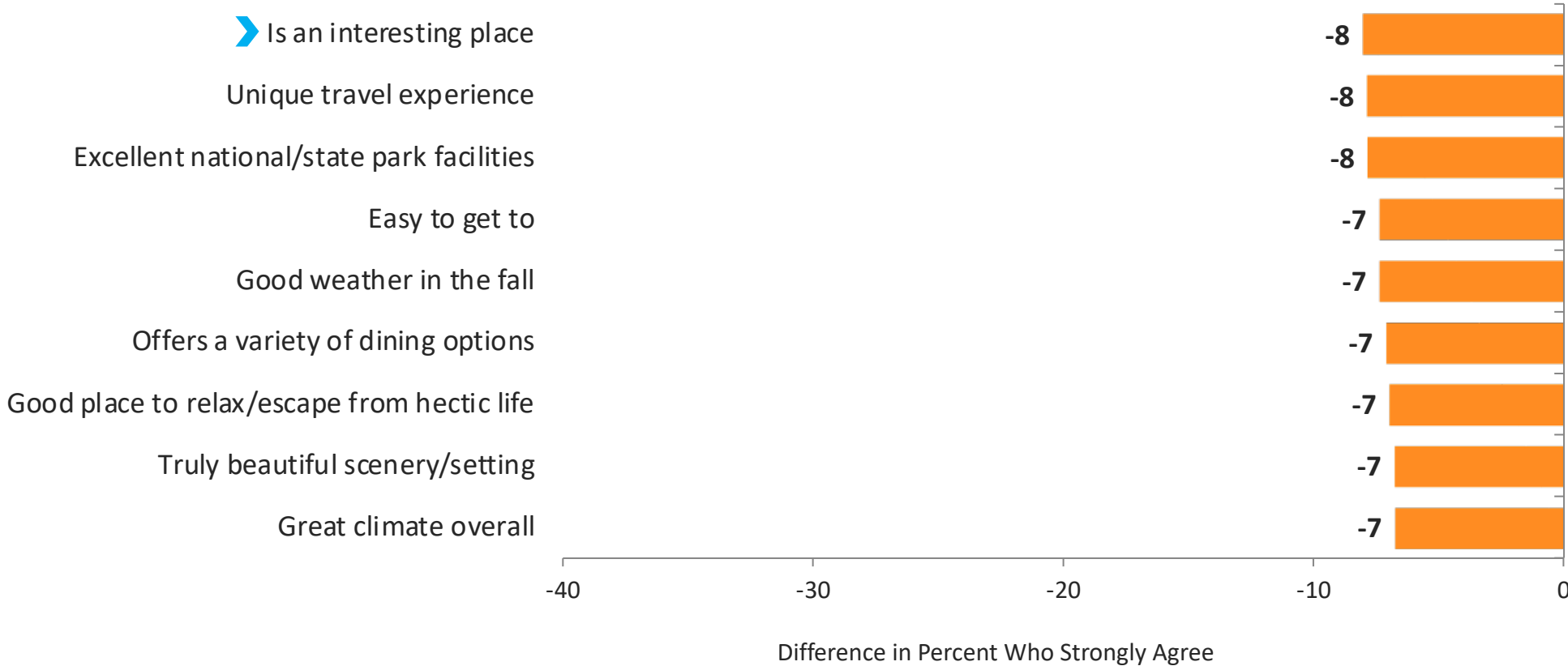
Base: New Markets



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

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

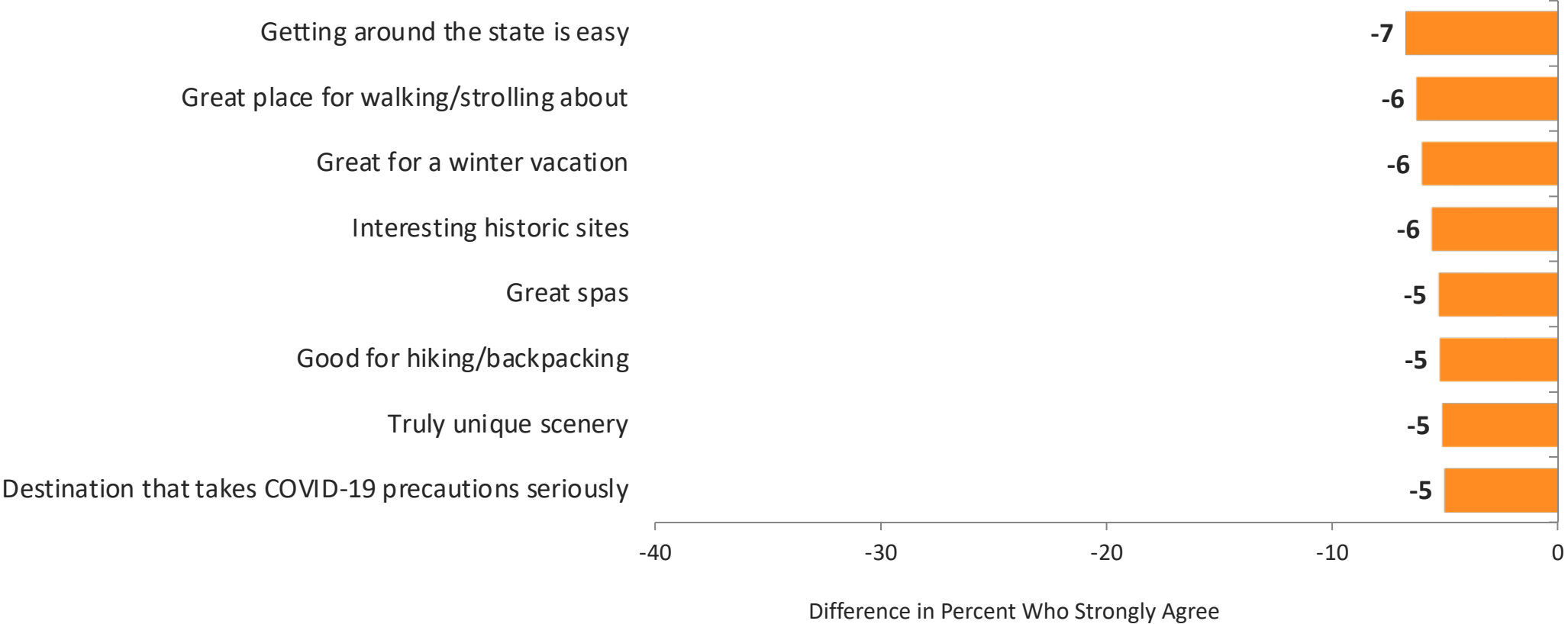
Base: New Markets



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

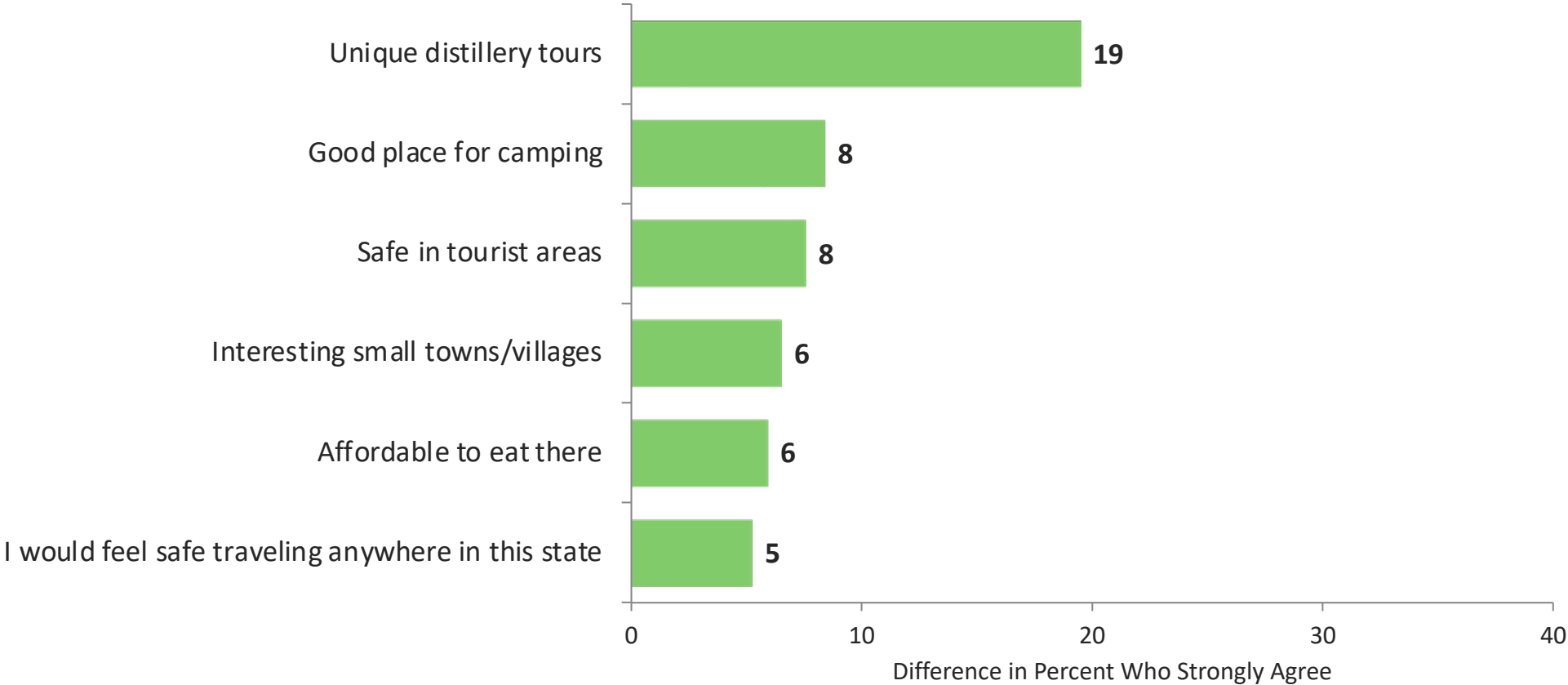
Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

Base: New Markets



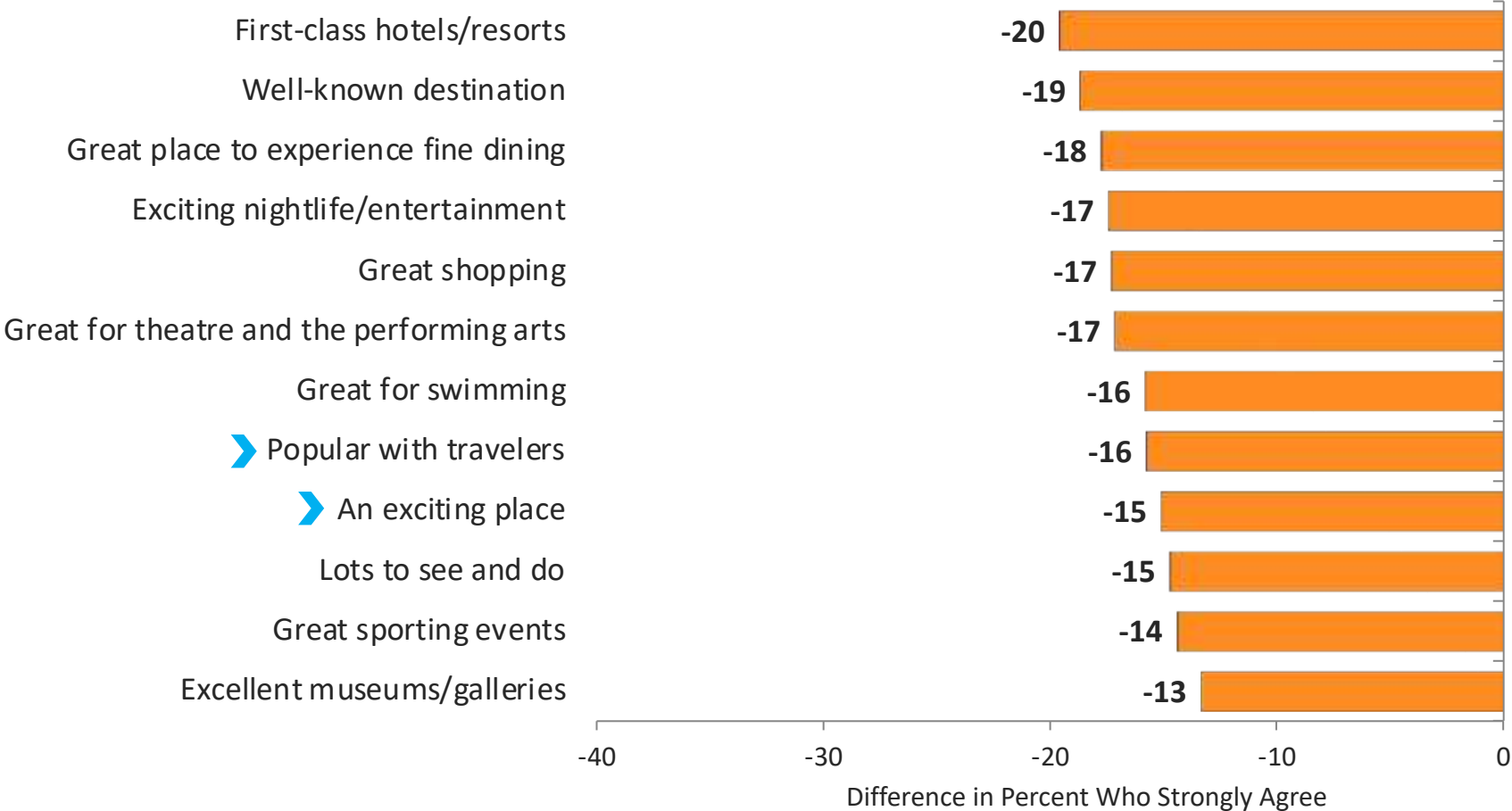
Kentucky's Image Strengths vs. Georgia

Base: New Markets



Kentucky's Image Weaknesses vs. Georgia

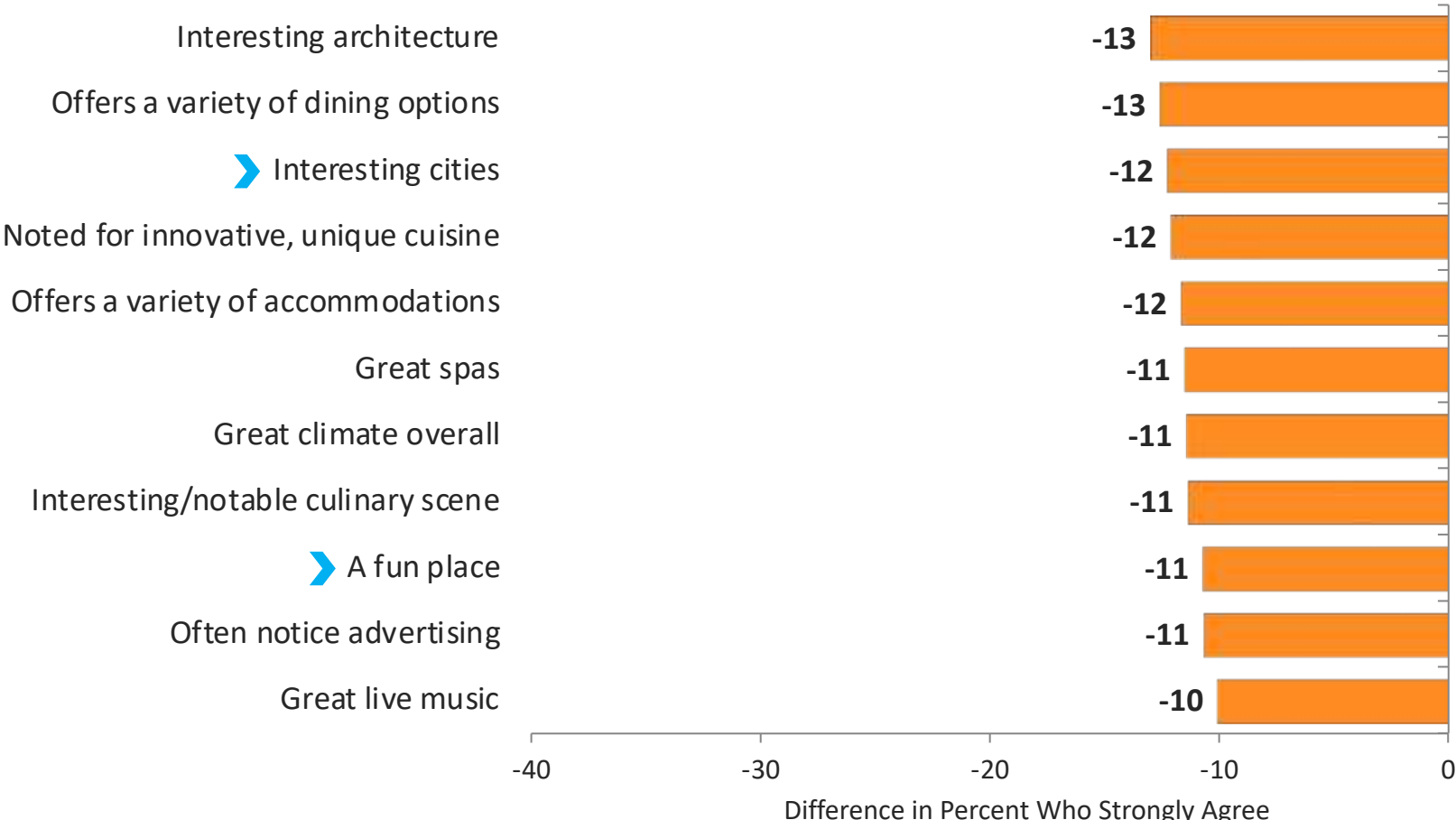
Base: New Markets



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

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

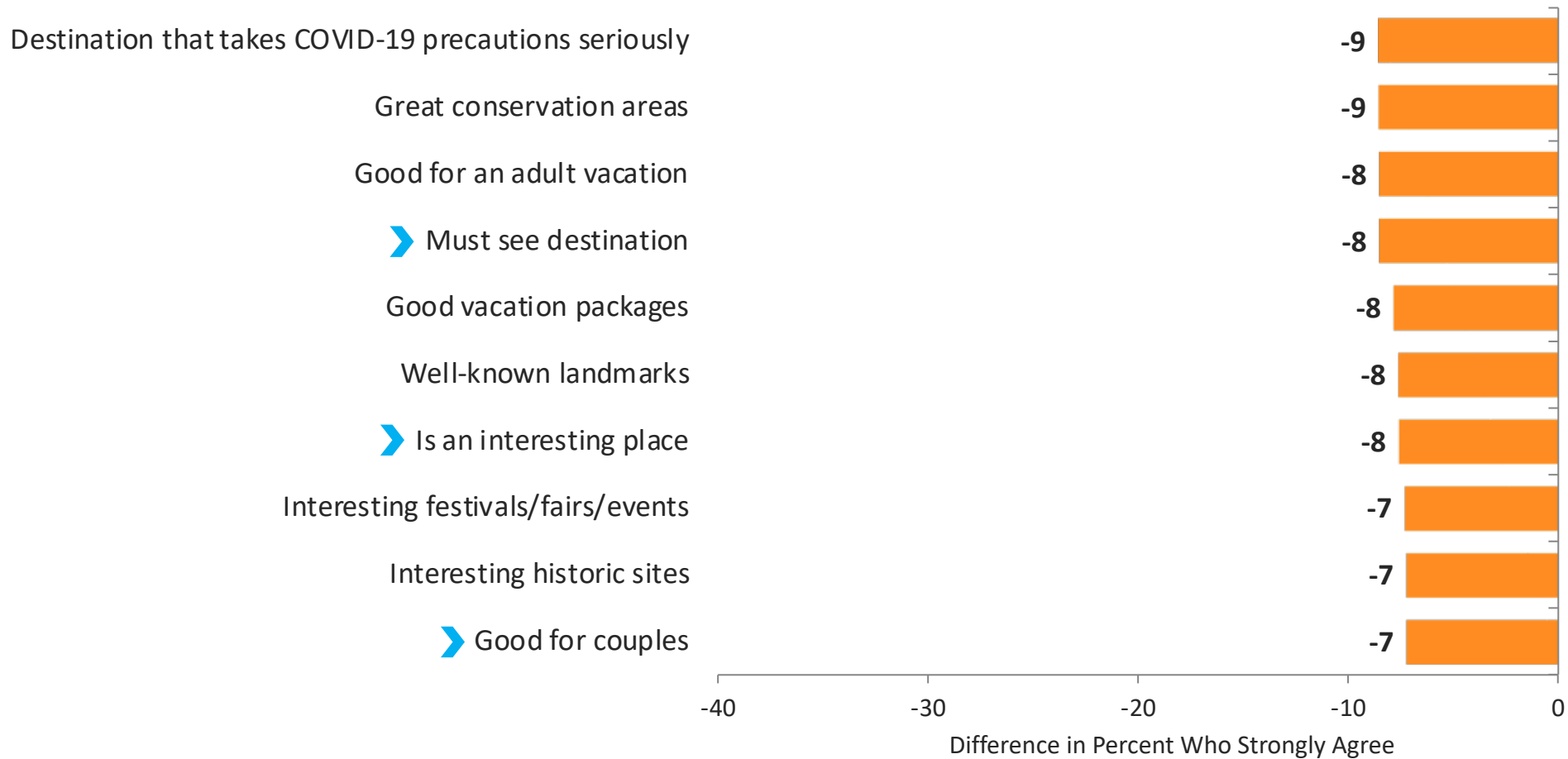
Base: New Markets



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

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

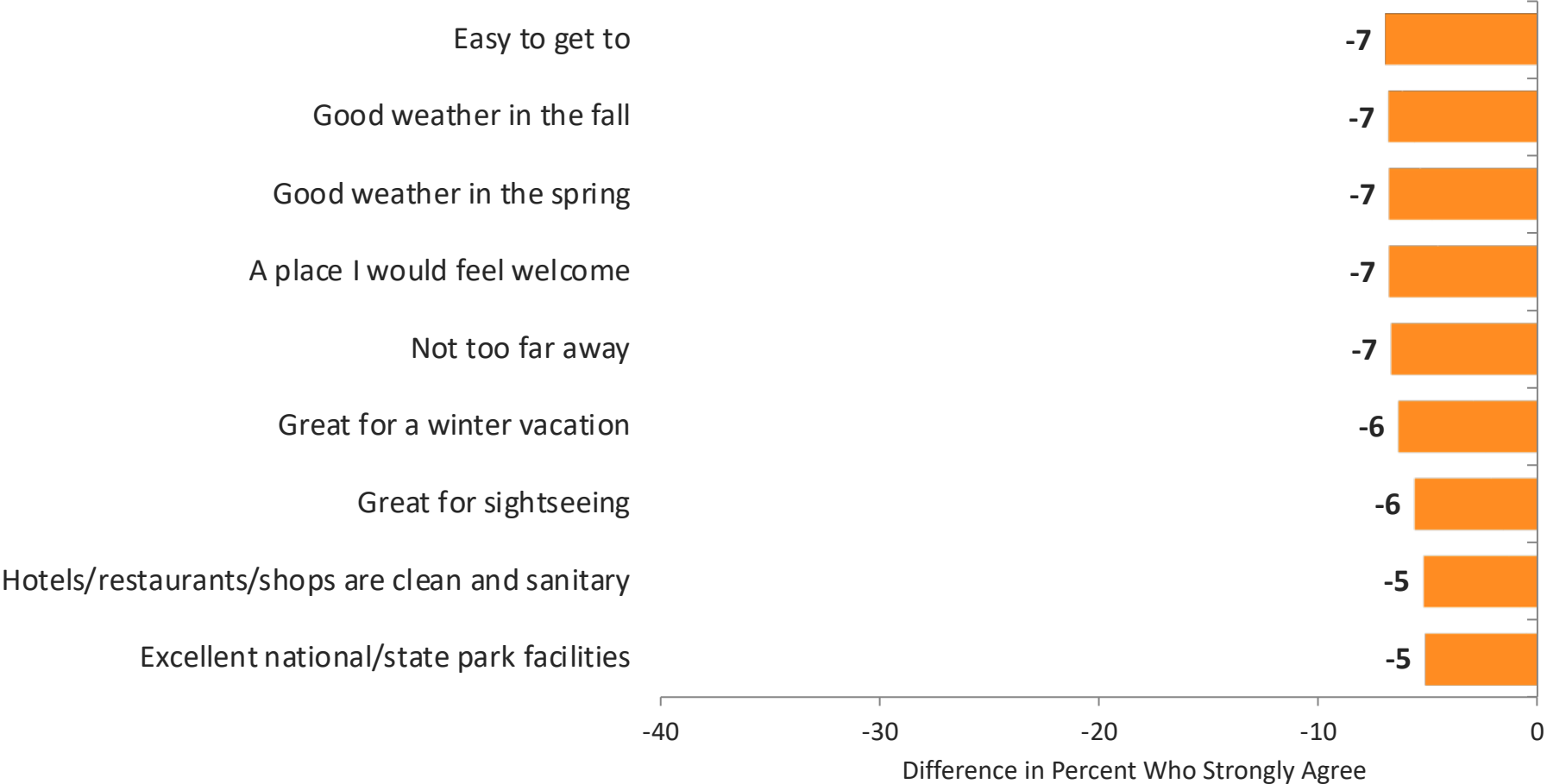
Base: New Markets



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

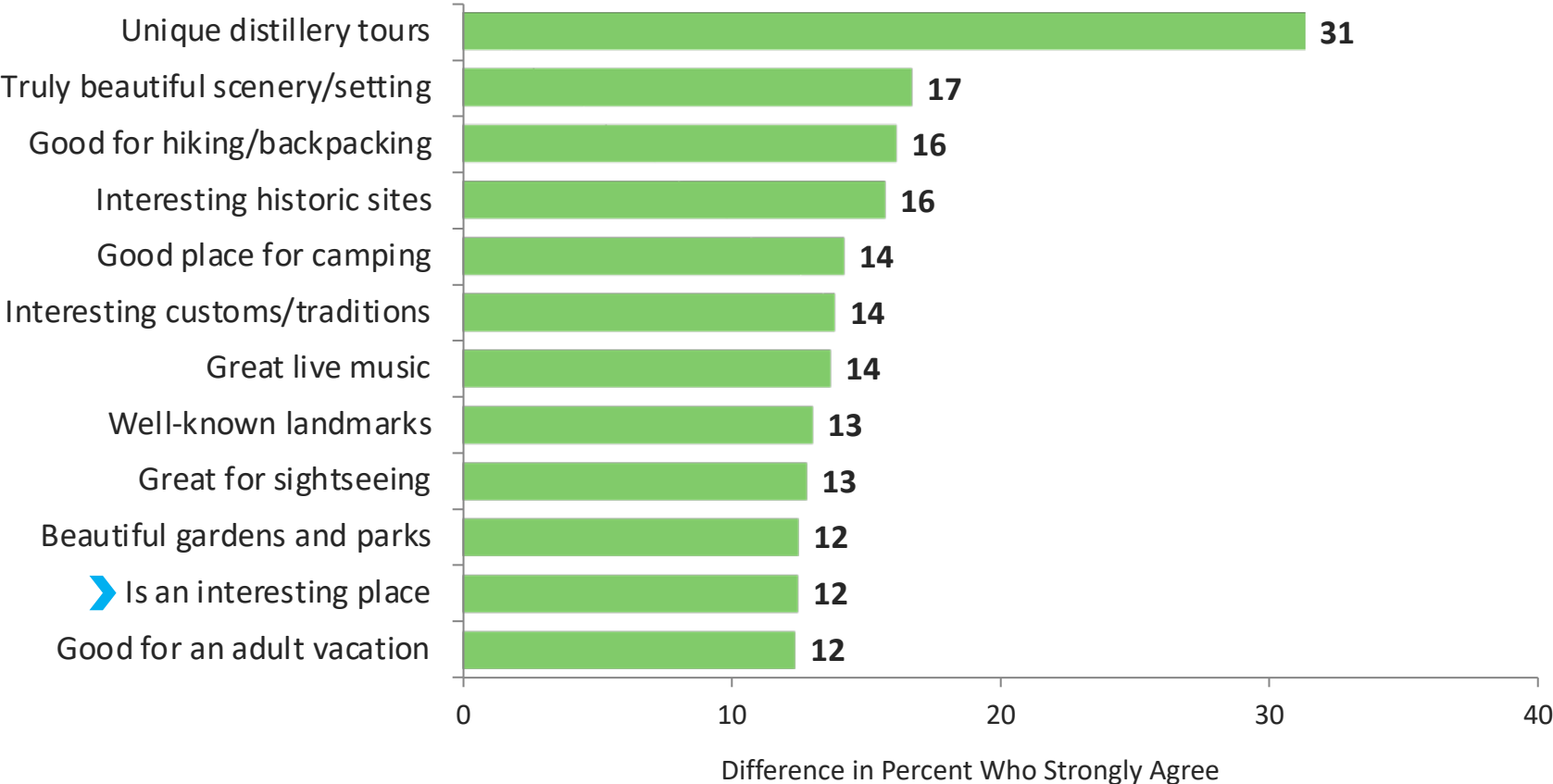
Kentucky's Image Weaknesses vs. Georgia (Cont'd)

Base: New Markets



Kentucky's Image Strengths vs. Indiana

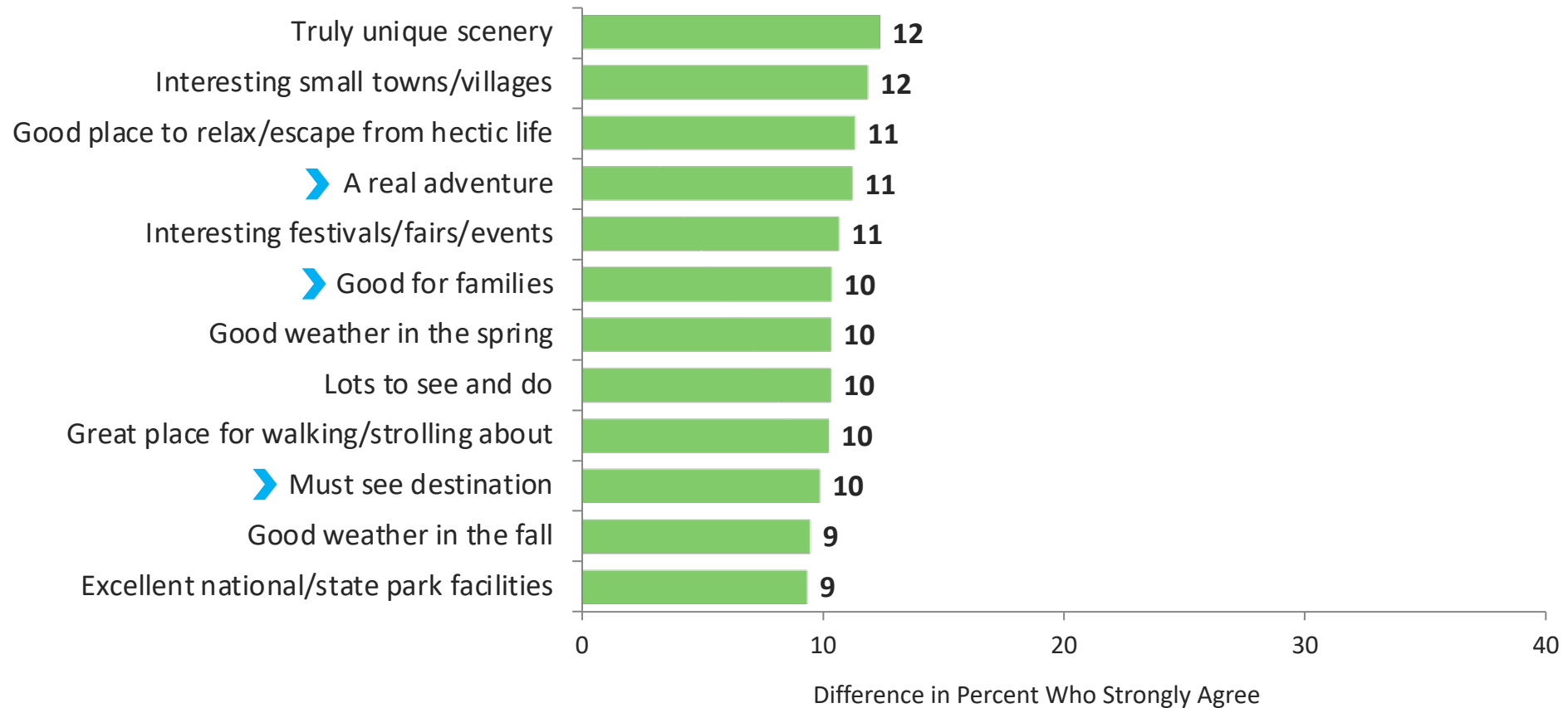
Base: New Markets



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

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

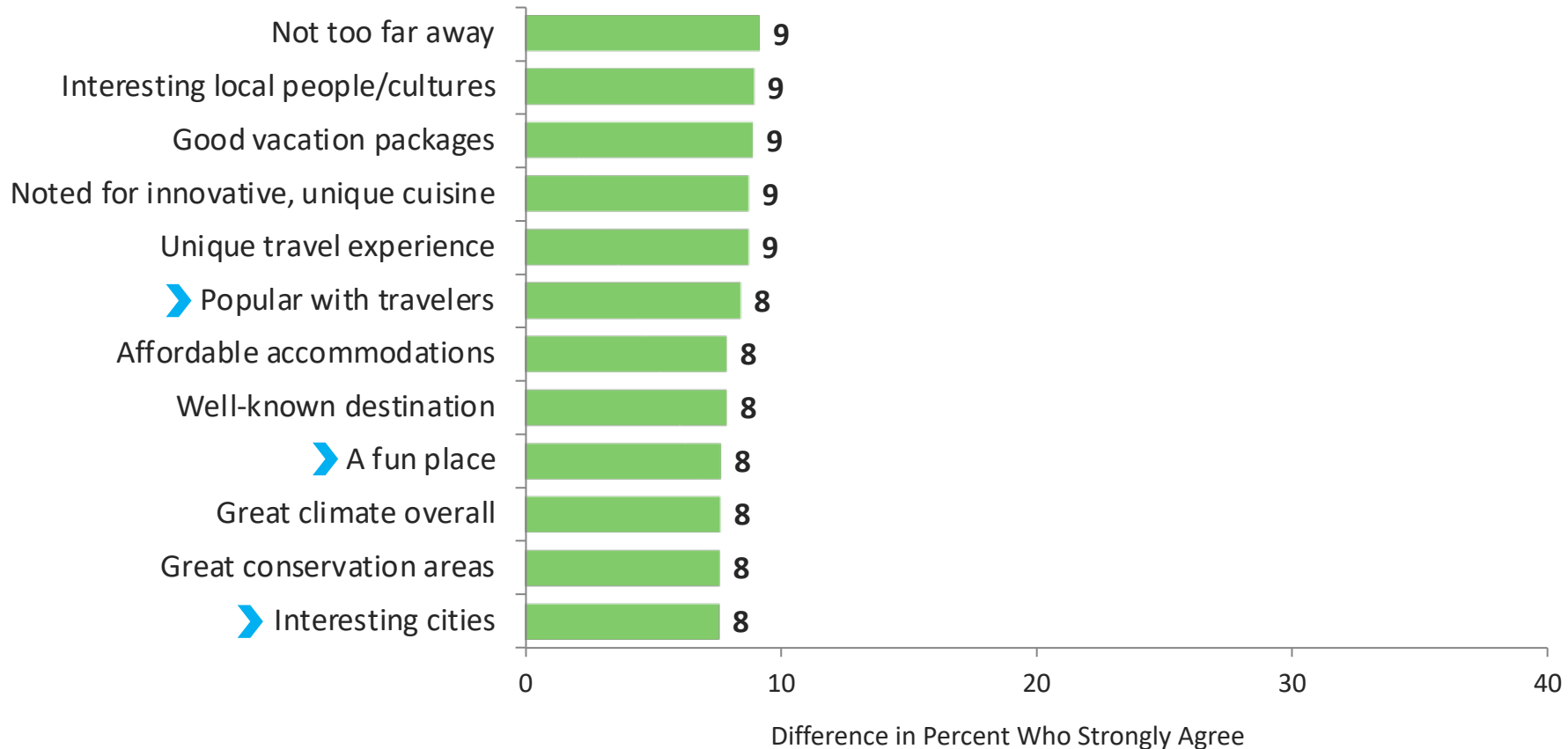
Base: New Markets



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

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

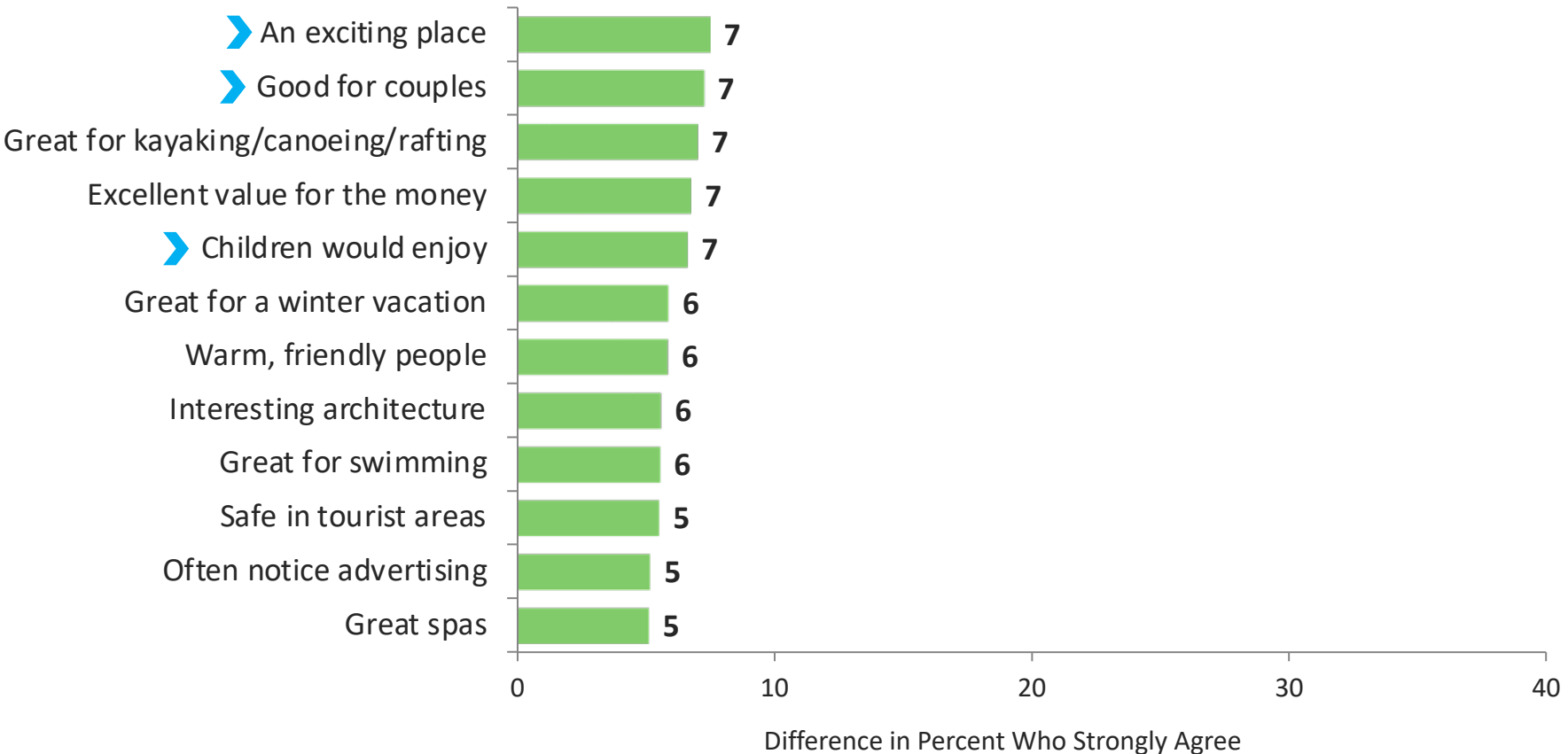
Base: New Markets



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

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

Base: New Markets

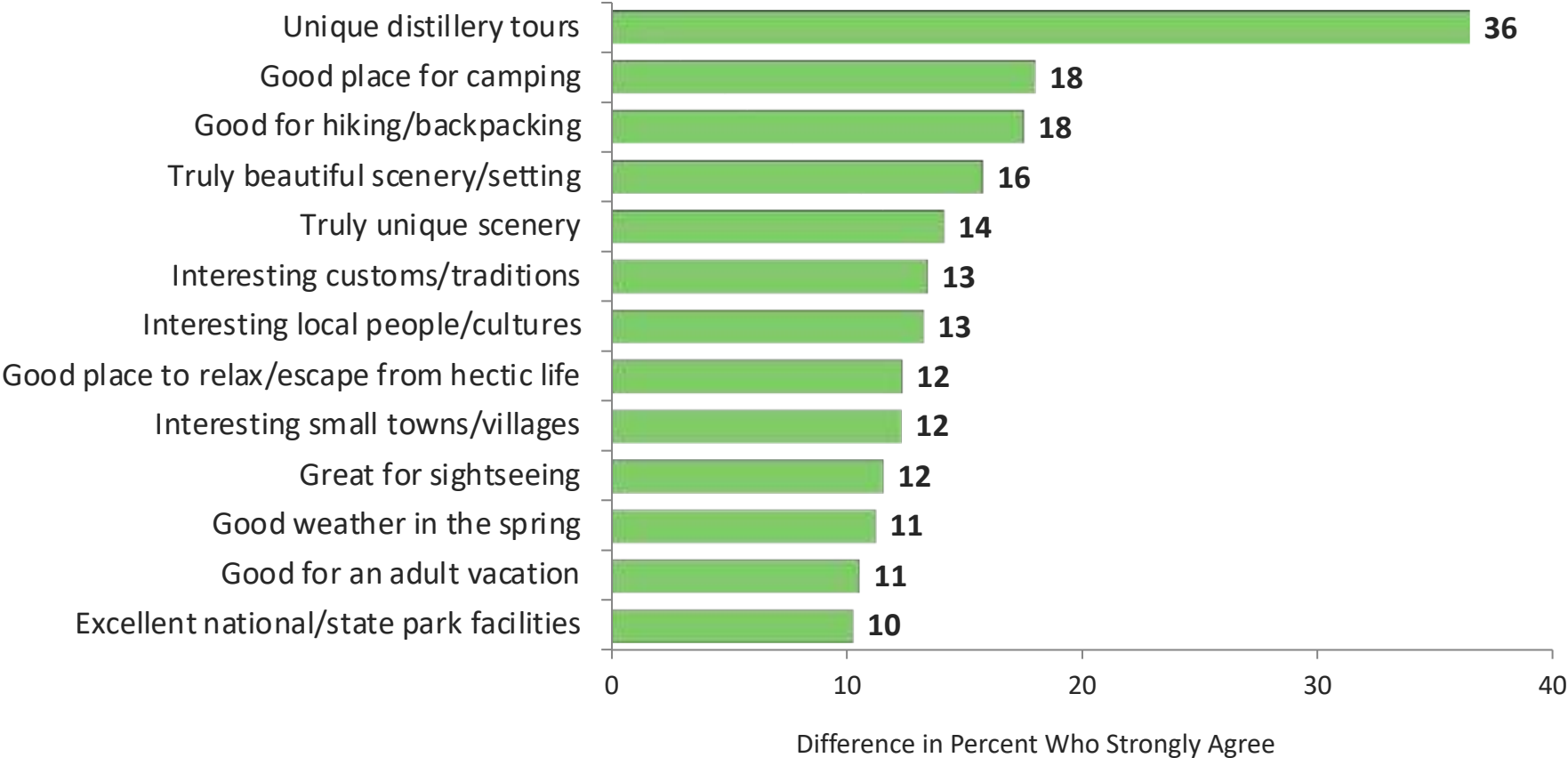


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

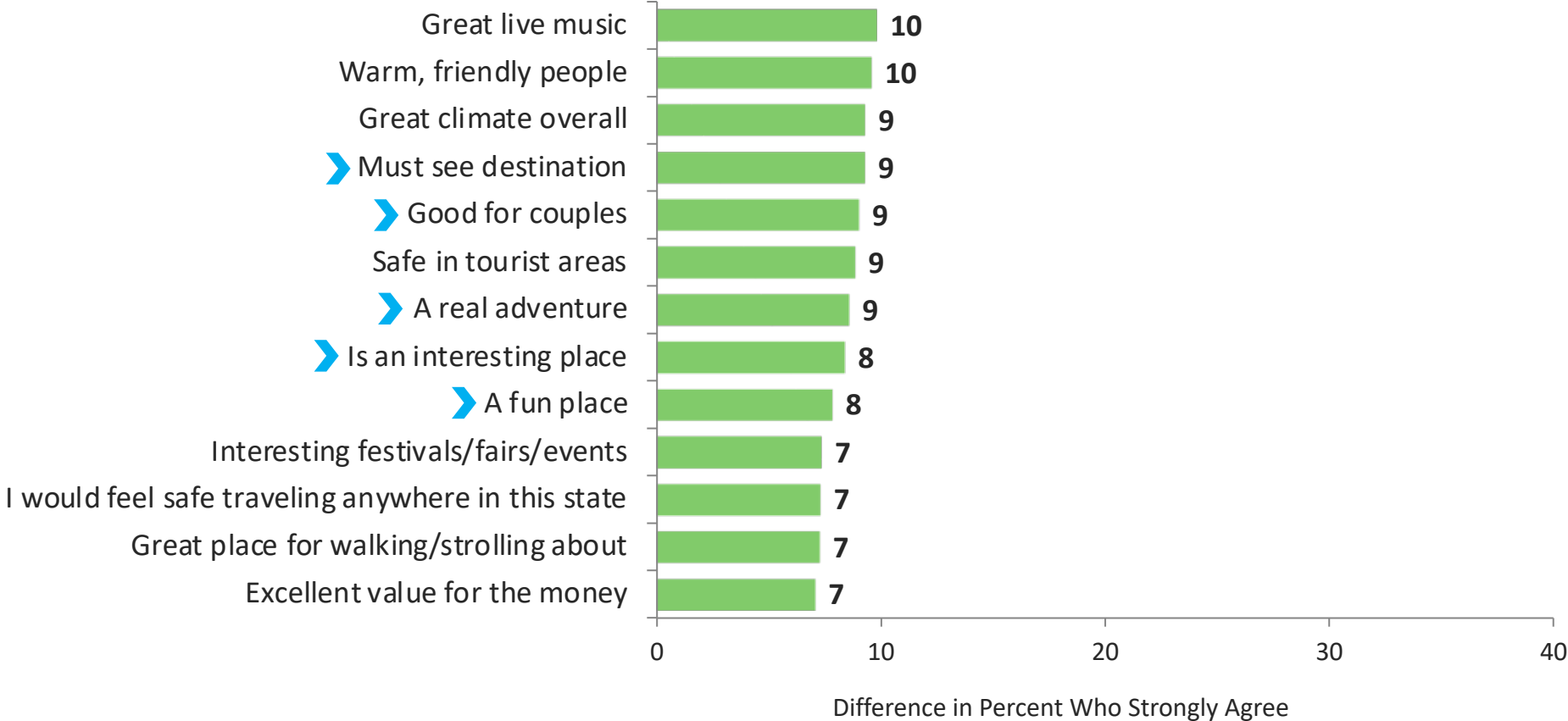
Kentucky's Image Strengths vs. Ohio

Base: New Markets



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

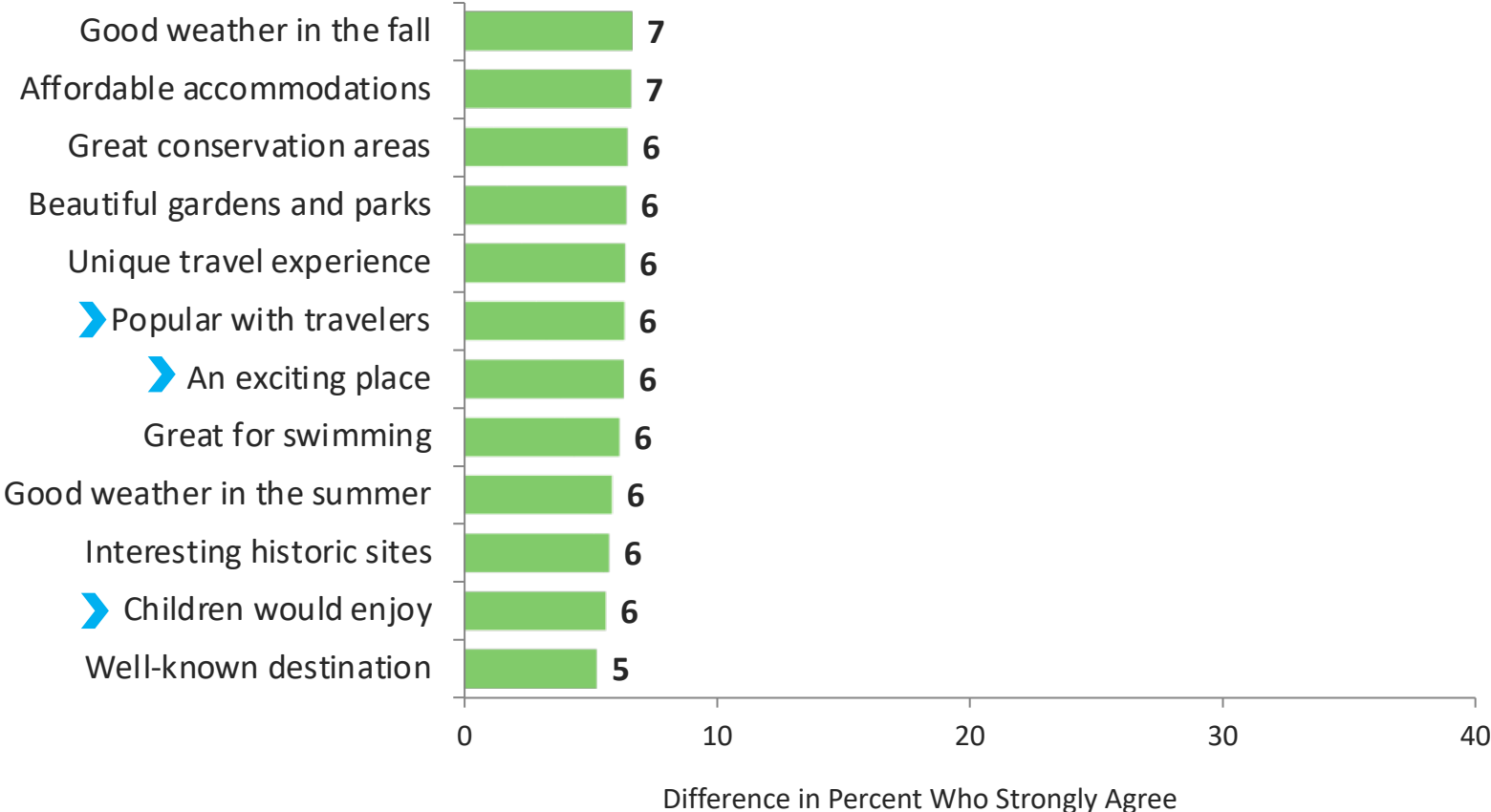
Base: New Markets



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

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

Base: New Markets

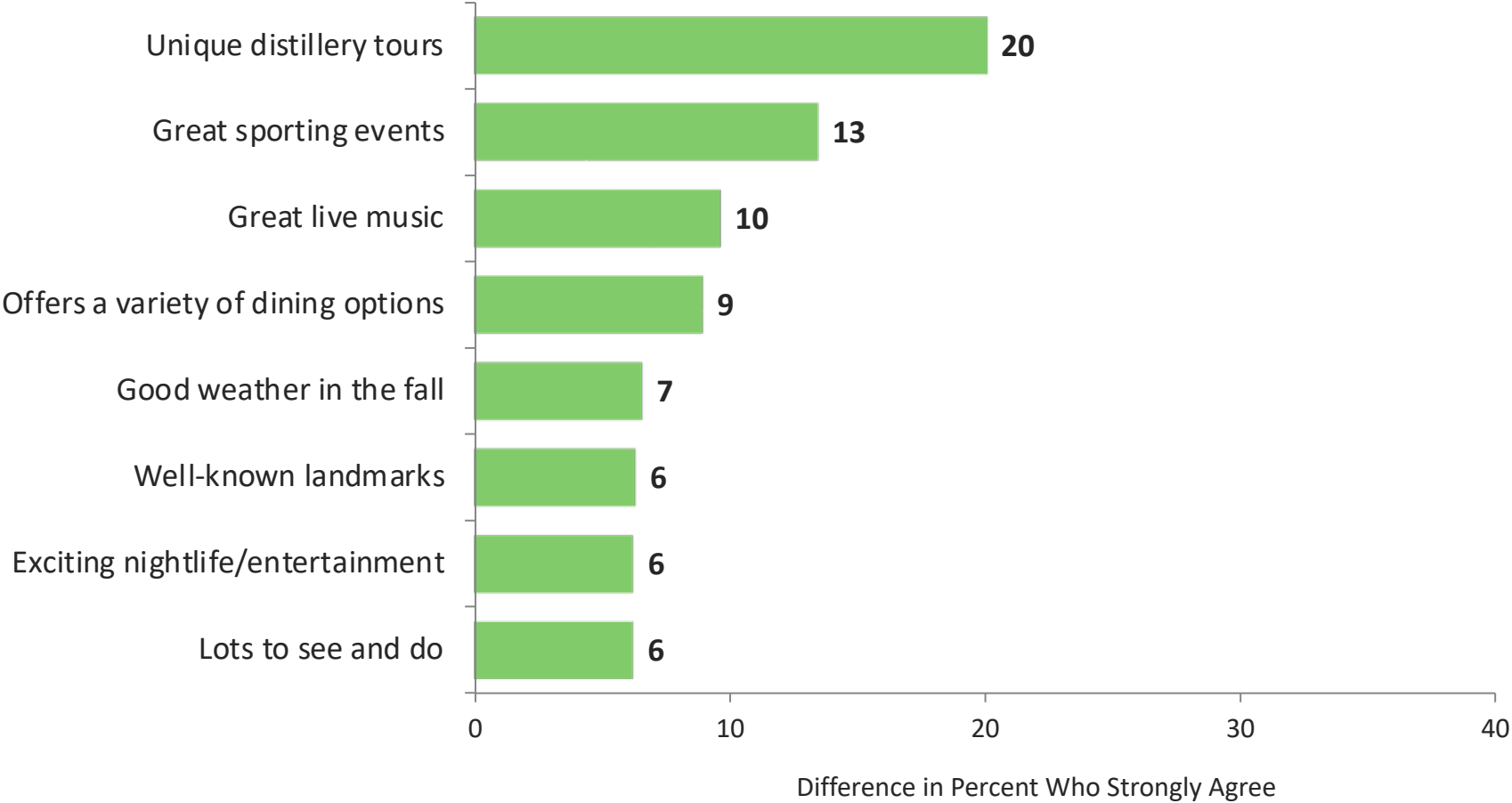


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

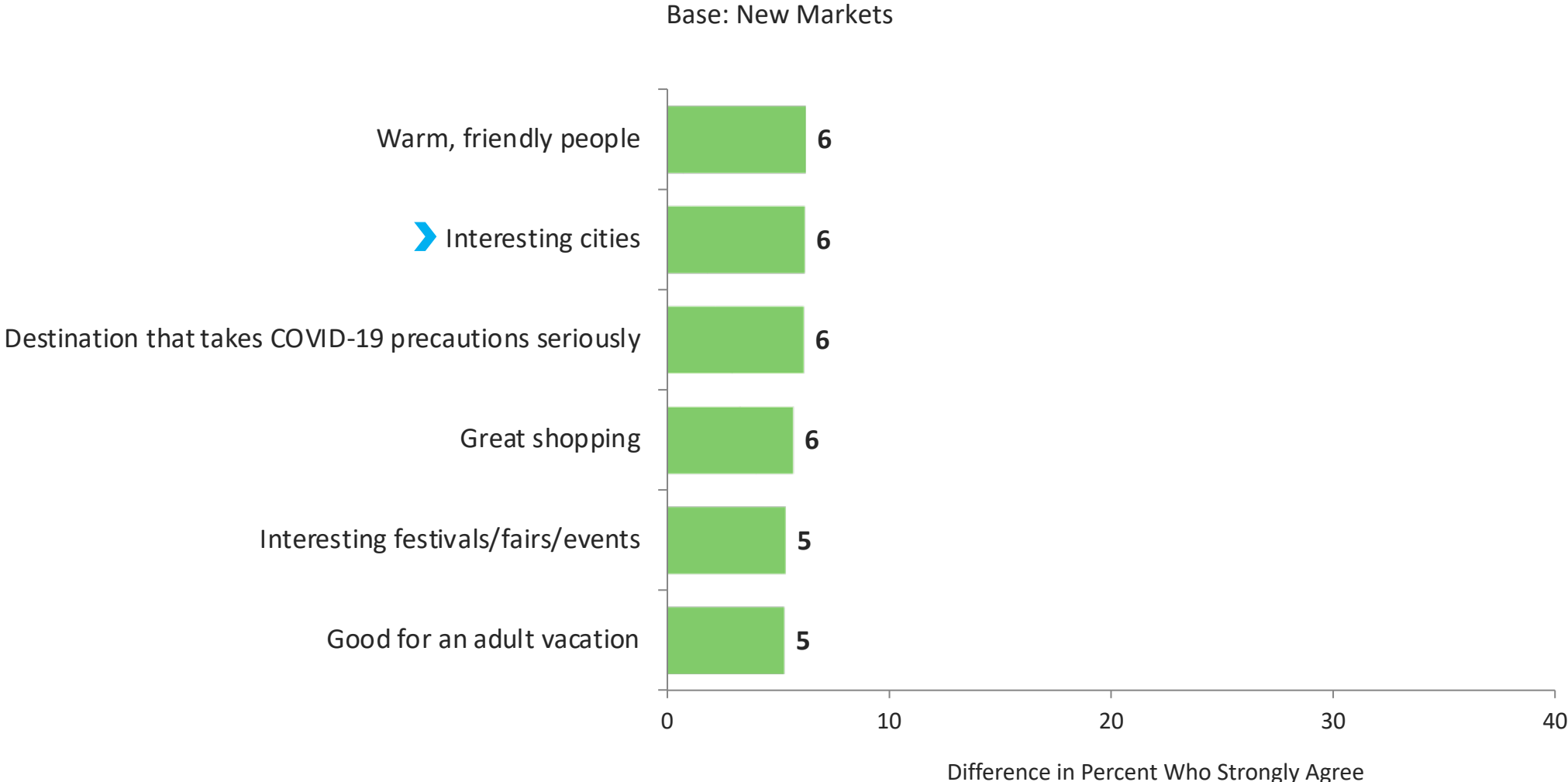
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. OHIO**

Kentucky's Image Strengths vs. West Virginia

Base: New Markets



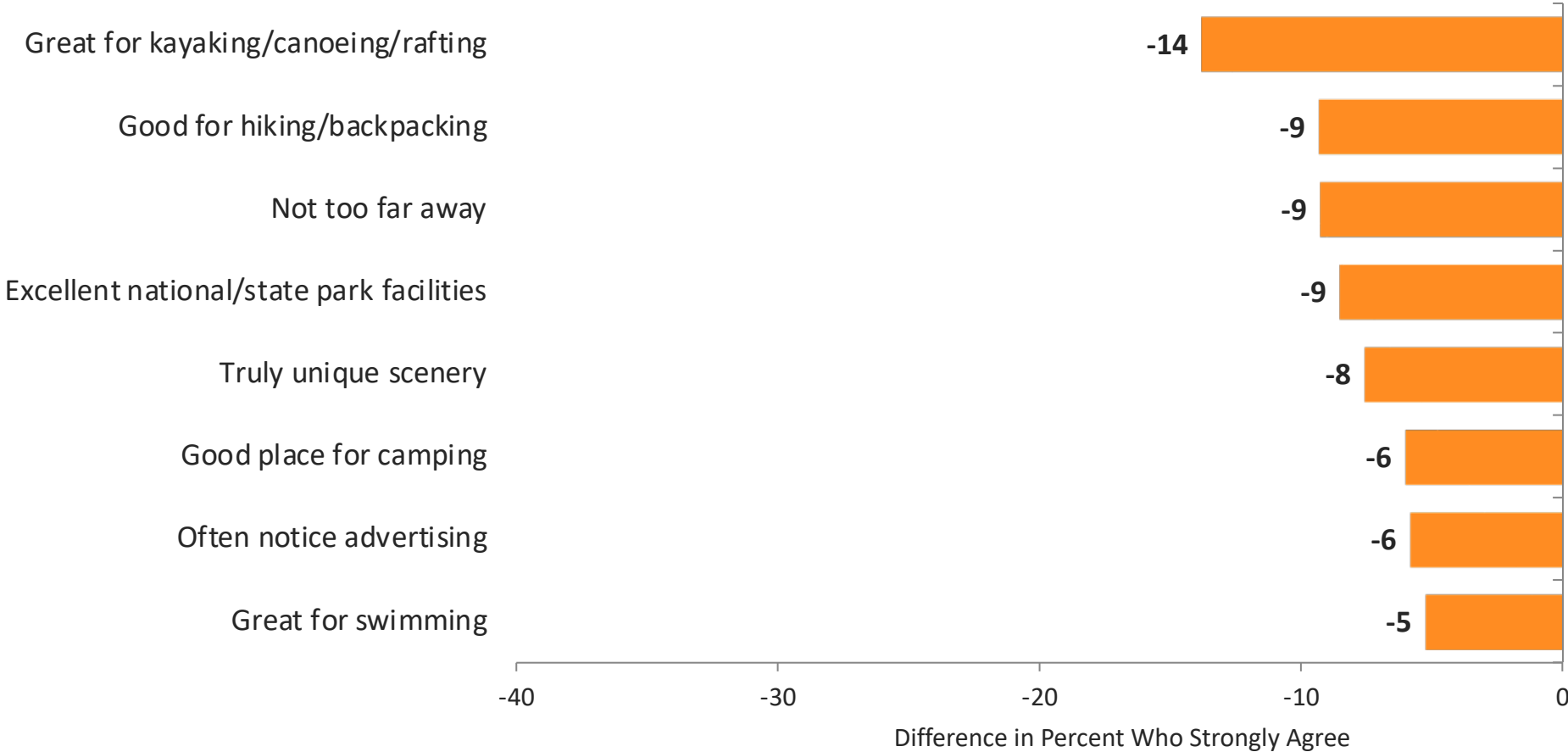
Kentucky's Image Strengths vs. West Virginia (Cont'd)



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

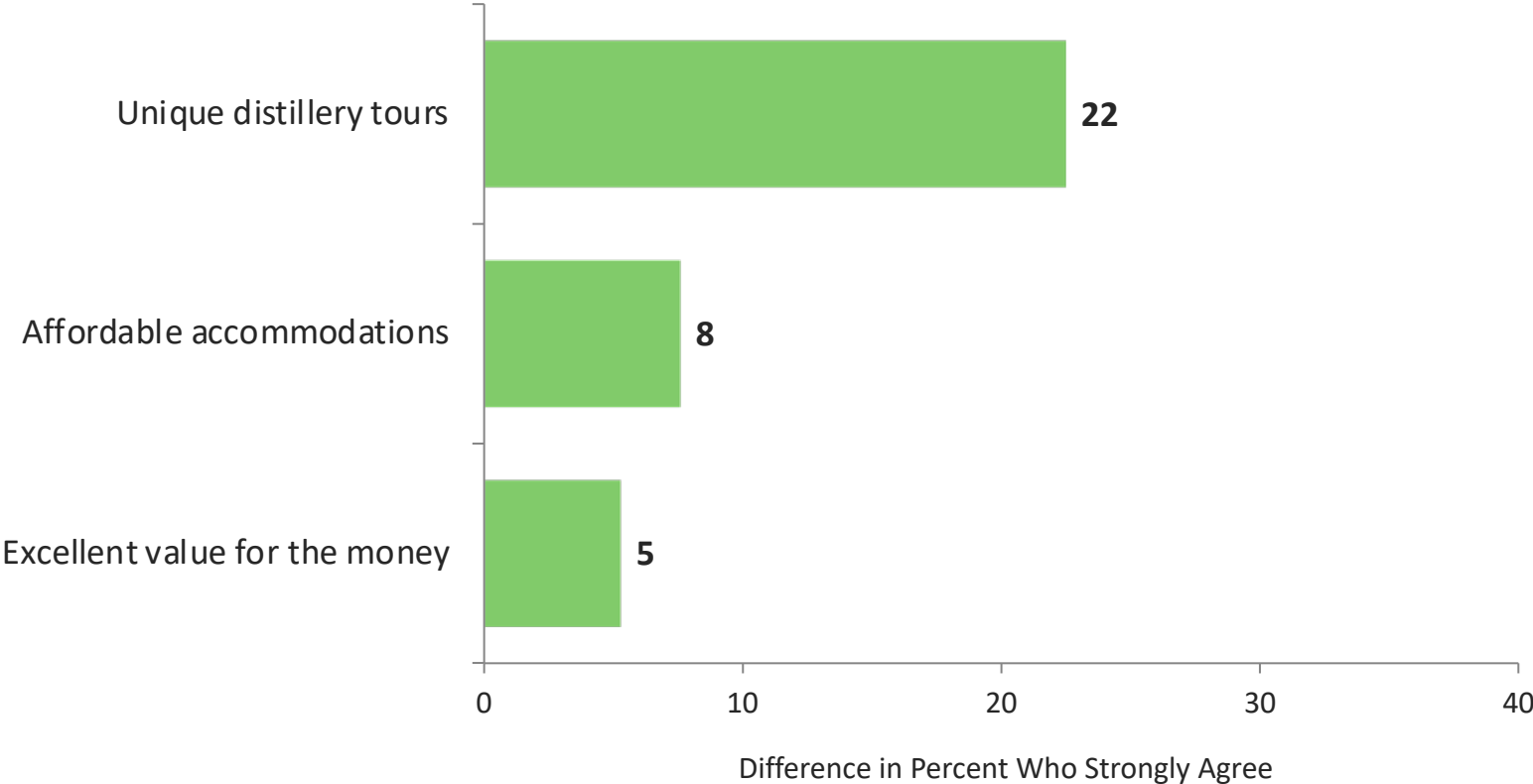
Kentucky's Image Weaknesses vs. West Virginia

Base: New Markets



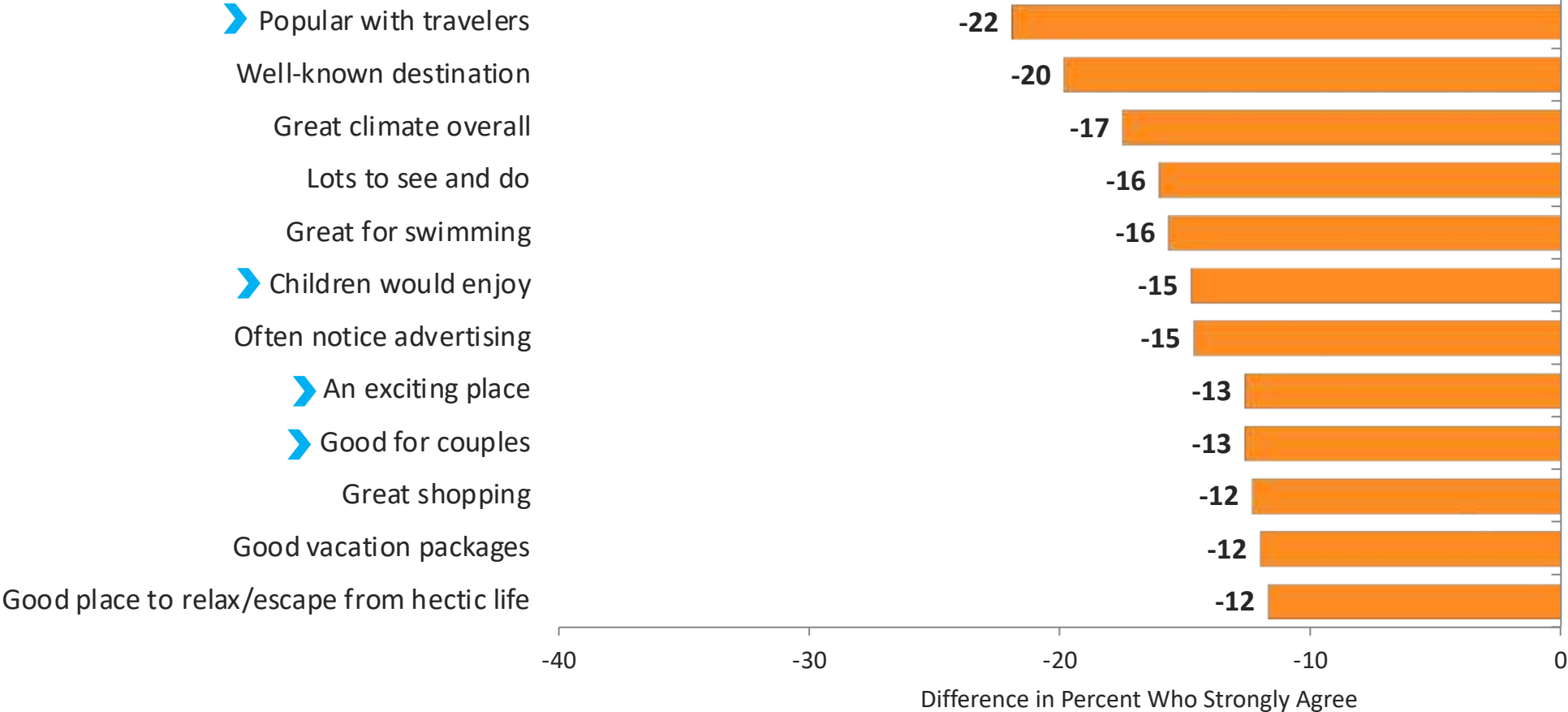
Kentucky's Image Strengths vs. North Carolina

Base: New Markets



Kentucky's Image Weaknesses vs. North Carolina

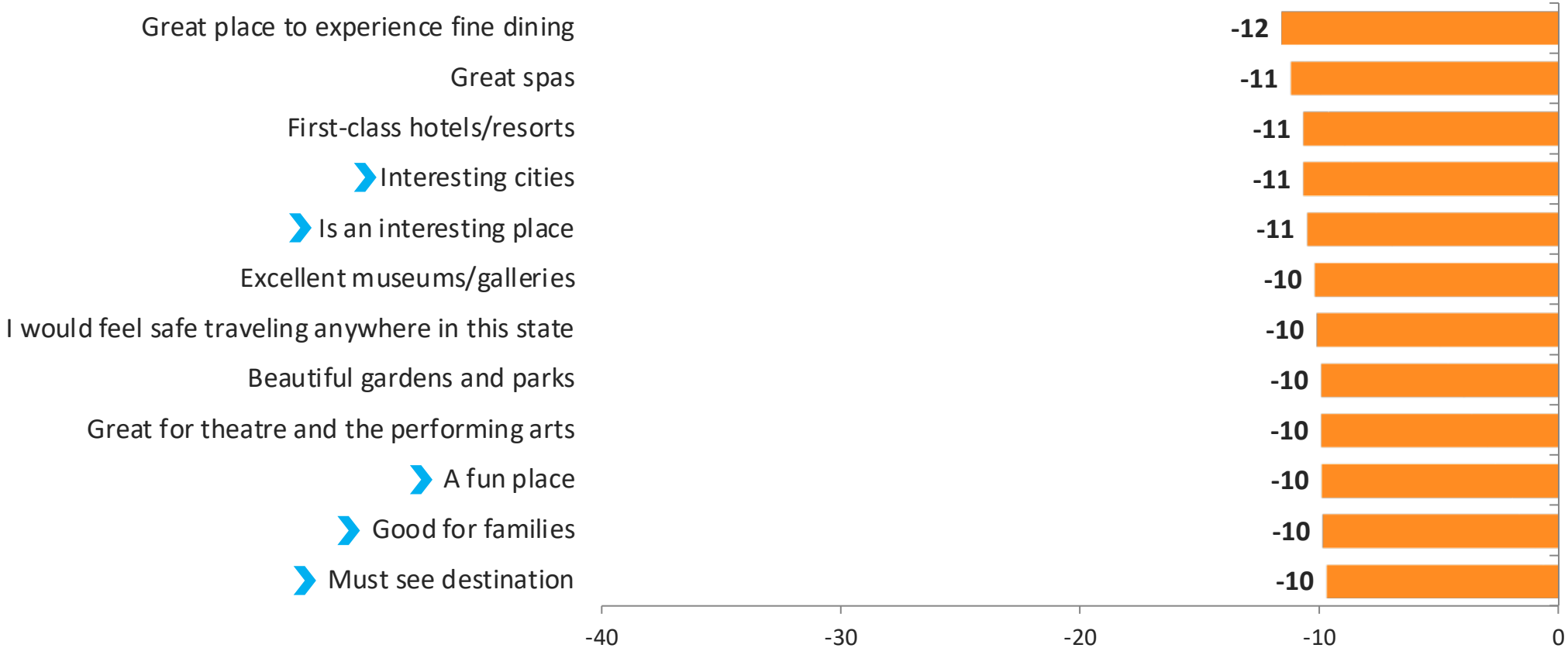
Base: New Markets



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

Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

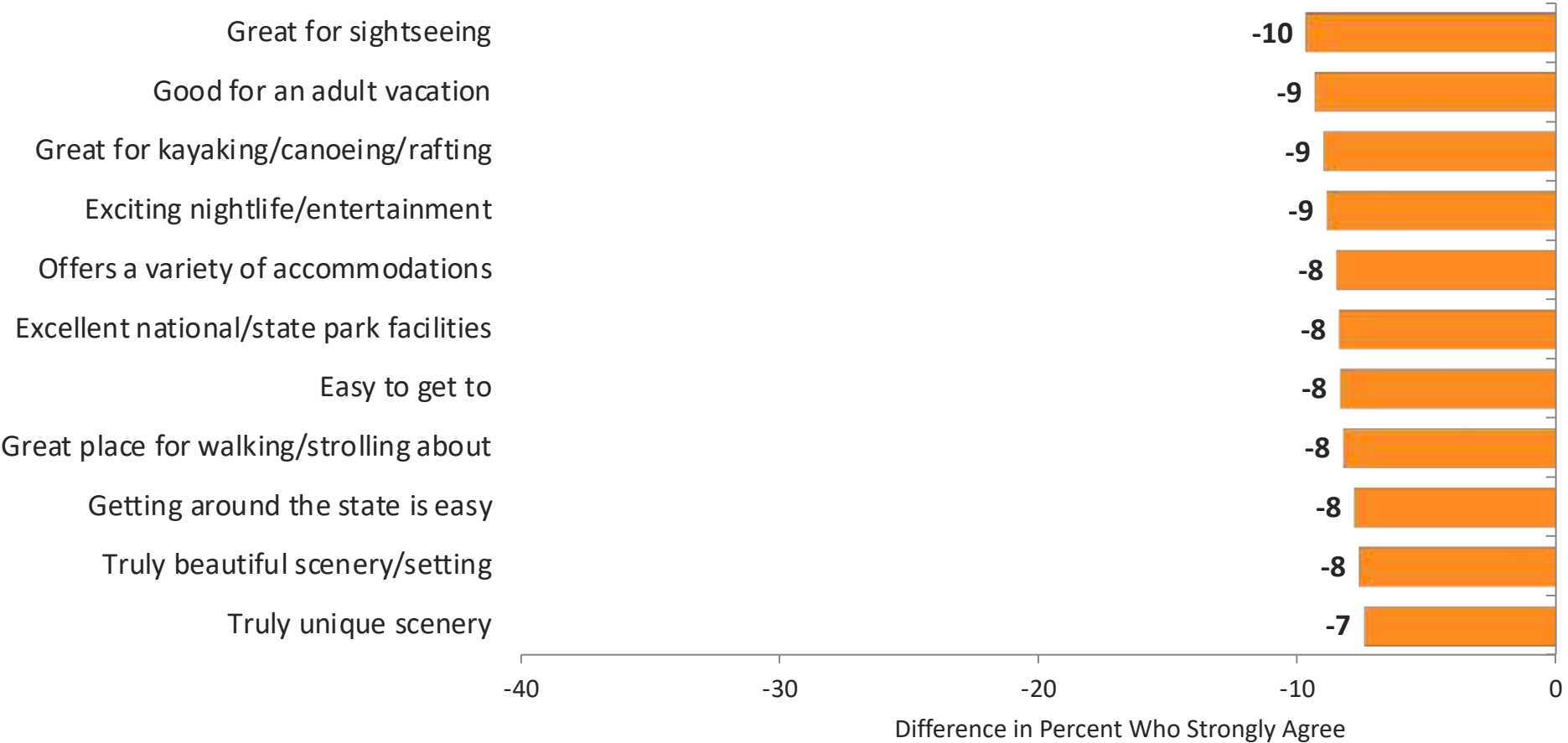
Base: New Markets



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

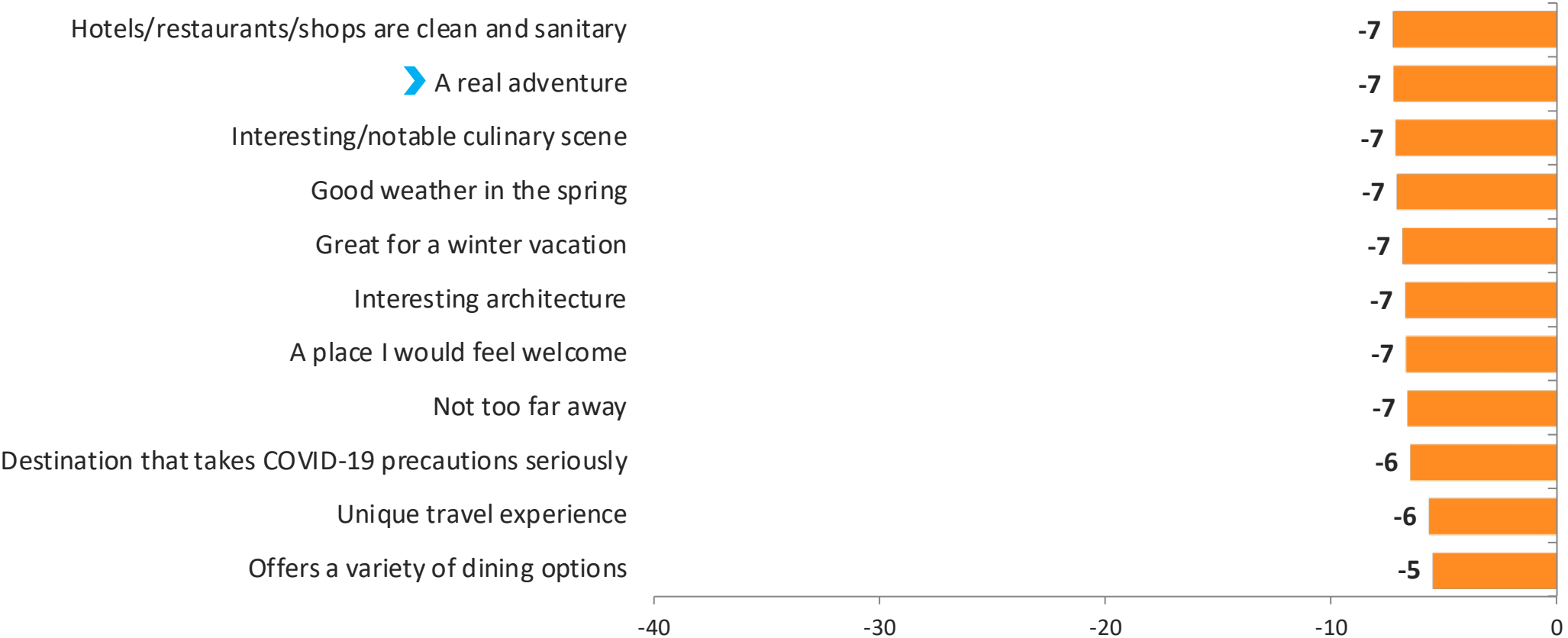
Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

Base: New Markets



Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

Base: New Markets



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