

## Kentucky 2022 Advertising ROI Research – Total 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 2,018 respondents in the advertising markets, distributed as follows:

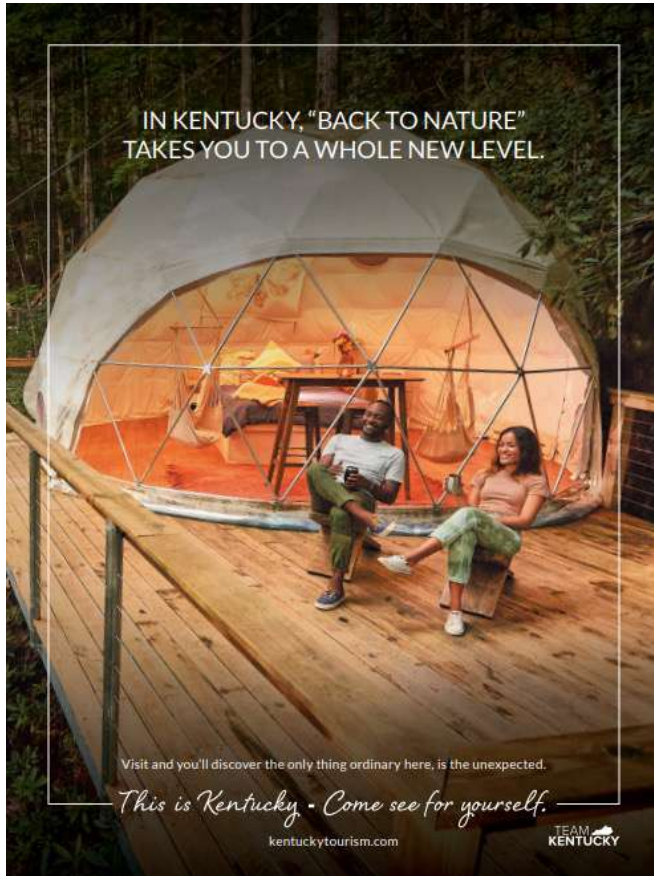
<b>Existing Markets</b>		<b>New Markets</b>	
ATLANTA	163	DALLAS-FORT WORTH	370
BOWLING GREEN	10	DAYTON	65
CHARLESTON-HUNTINGTON	30	ORLANDO-DAYTONA BEACH-MELBOURNE	215
CHICAGO	221	WASHINGTON, DC (HAGERSTOWN)	352
CINCINNATI	58		
COLUMBUS, OH	60	<b>Total</b>	<b>1002</b>
DETROIT	110		
EVANSVILLE	21		
INDIANAPOLIS	72		
KNOXVILLE	32		
LEXINGTON	31		
LOUISVILLE	44		
NASHVILLE	66		
PADUCAH-CAPE GIRARDEAU-HARRISBURG	20		
SAINT LOUIS	70		
Tri-Cities DMA Counties: Leslie and Letcher	8		
<b>Total</b>	<b>1016</b>		

# 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=2,018 travelers).



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## Conclusions and Recommendations

# Key Findings

- Over half of travelers in Kentucky's total advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. Almost six in ten of travelers in Kentucky's existing markets recalled seeing at least one ad, while over half of travelers in Kentucky's new markets did. The overall, existing, and new markets results are significantly higher than 2021.
- Among total market travelers, there's only a 14-point difference between the media type with the highest and lowest awareness. Four in ten total market travelers recalled at least one video, over a third recalled at least one print or digital ad, and three in ten recalled at least one social media or radio ad. A quarter recalled at least one OOH ad.
- Looking at advertising awareness by campaign, those with the highest awareness was the Spring/Fall AOR, the Hispanic Traveler and the Black Traveler campaigns.
- Over one in ten travelers in Kentucky's total markets were aware of the Kentucky Tourism website, down five points from 2021. Seven in ten of those travelers finding it very helpful.
- In the markets included in this study, there were an estimated 399 million recalled ad exposures over the campaign period, 1 million more than achieved in 2021. Print (87 million exposures) and digital ads (84 million exposures) showed highest frequency of recall, followed by video (71 million exposures), social (70 million exposures), radio (50 million exposures) and OOH ads (36 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, we see that the 2022 campaigns had a cost of \$16 per thousand of exposures recalled, a significant improvement over 2021's \$21. Social media and print ads constituted the most efficient mediums in terms of generating recall per dollar spent, at \$7 and \$8 per thousand of exposures recalled, respectively.
- The campaigns included in this study produced an additional 2.7 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising. 2.2 million of those incremental trips were from existing markets, and 0.4 million from new markets.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$385.3 million on those trips. When related to advertising costs of \$6.5 million, this translates into a return on investment of \$60 in visitor spending for each ad dollar spent. The total market spending ROI of \$60 is tied with 2018 for the second-best result in the five years Kentucky has conducted this survey with Longwoods.
  - \$308.8 million of that incremental spending came from existing markets, and when related to advertising costs of \$4.9 million, results in a spending ROI of \$63 for every advertising dollar spent.
  - \$76.5 million of that incremental spending came from new markets, and when related to advertising costs of \$1.6 million, results in a spending ROI of \$49 for every advertising dollar spent.

# Key Findings (Cont'd)

- Looking at total markets, KDT spent \$2.42 for every incremental trip taken. This is up from 2021's \$2.00. The price per trip in existing markets was \$2.19 and \$3.61 in new markets.
- Those incremental expenditures in total advertising markets yielded \$29.3 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 \$23.5 million in incremental state and local taxes, and a tax ROI of \$5.
  - For new markets, there was \$5.8 million in incremental state and local taxes, and a tax ROI of \$4.
- 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.
  - 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 overall target markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; a real adventure; good for an adult vacation; lots to see and do; children would enjoy; and popular with travelers.



# Key Findings (Cont'd)

- The perception of Kentucky among travelers in the state's total markets as “a place I would really enjoy visiting” has remained steady between 2021 and 2022, with 47% strongly agreeing in 2022. Looking at year-over-year image battery results overall, Kentucky's reputation as a leisure destination has mostly remained steady. However, the following three Hot Button attributes have declined:
  - A real adventure (down 6 points)
  - A fun place (down 5 points)
  - Popular with travelers (down 5 points)
- The campaign had a positive impact on travelers' perceptions of Kentucky. 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 18 point or more lift: a real adventure; a fun place; must see destination; an exciting place; and children would enjoy. In fact, there are no variables included in the Image battery where significantly more travelers unaware of the advertising rated Kentucky higher than those who were aware of the KDT campaign.
- Recent visitation positively impacted the perceptions of Kentucky across all ten Hot Button attributes included in the study, with all having a lift of over 15 points. These Hot Buttons experienced a lift of over 20 points: must see destination; is an interesting place; children would enjoy; lots to see and do; and a fun place. Among all the Image attributes evaluated, there were no areas where visitors felt Kentucky failed to live up to expectations.



# Key Findings (Cont'd)

- Half of travelers within the total advertising markets have visited Kentucky during their lifetimes. Three in ten travelers within the total advertising markets have visited Kentucky during the past 2 years. Four in ten travelers within the total advertising markets intend to visit Kentucky during the next 12 months.
- Among travelers who visited Kentucky overnight, the most popular activities were shopping, trying unique/local foods, outdoor activities, visiting a national/state park, and visiting a landmark/historical site.
- Relative to the other destinations in the competitive set for this study, Kentucky is competitive among travelers in their total advertising markets. Tennessee, Georgia, and North Carolina offer the strongest challenge to Kentucky in the competitive set.
- 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.



## Main Findings: Advertising Impacts



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Advertising  
Awareness

# Advertising Awareness

- Over half (56%) of travelers in Kentucky's total advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad.
  - Almost six in ten (57%) of travelers in Kentucky's existing markets recalled seeing at least one ad, while over half (53%) of travelers in Kentucky's new markets did.
  - The overall, existing, and new markets results are significantly higher than 2021.
- Among total market travelers, there's only a 14-point difference between the media type with the highest and lowest awareness. Four in ten (40%) total market travelers recalled at least one video ad, over a third recalled at least one print (36%) or digital (36%) ad, and three in ten recalled at least one social media (31%) or radio (30%) ad. A quarter (26%) recalled at least one OOH ad.
  - For existing markets, the levels of recall range between 41% of travelers recalling at least one video ad to 27% recalling at least one OOH ad.
  - For new markets, the levels of recall range between 38% of travelers recalling at least one video ad to 25% recalling at least one OOH ad.
- Looking at advertising awareness by campaign, those with the highest awareness was the Spring/Fall AOR (54%), the Hispanic Traveler (39%), and the Black Traveler (39%) campaigns.

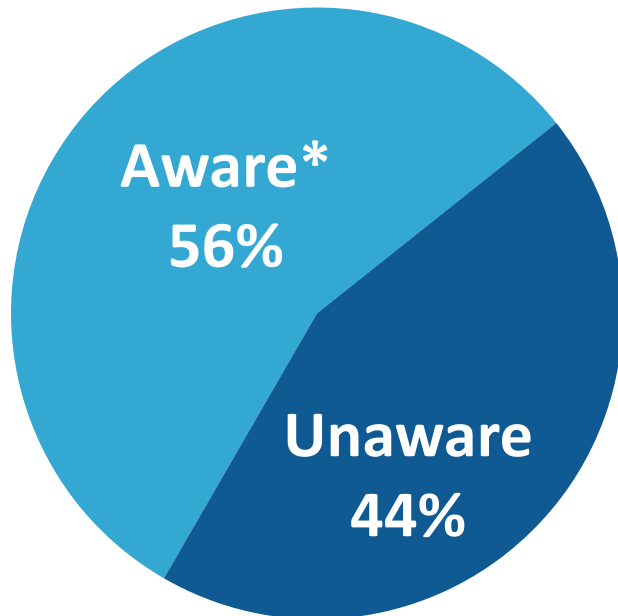
# Advertising Awareness (Cont'd)

- The ads with the highest level of recall were:
  - Spring AOR Video (video ad) – 35%
  - Hispanic Traveler Video (video ad) – 30%
  - Fall AOR OOH Digital Compilation 1 (OOH ad) – 28%
  - LBGTQ Traveler Video (video ad) – 28%
  - Spring/Fall AOR Audio (radio ad) – 27%
  - Charleston-Huntington Regional Compilation (digital ad) – 26%
  - Regional CLC Audio (radio ad) – 26%
- Over one in ten (14%) were aware of the Kentucky Tourism website, down five points from 2021. Seven in ten (71%) of those travelers finding it very helpful.
- Among travelers in the total advertising markets, over a third (37%) conducted an internet search to obtain more information about traveling to Kentucky, and two in ten visited [www.KentuckyTourism.com](http://www.KentuckyTourism.com) (20%) or researched the state on social media (18%).

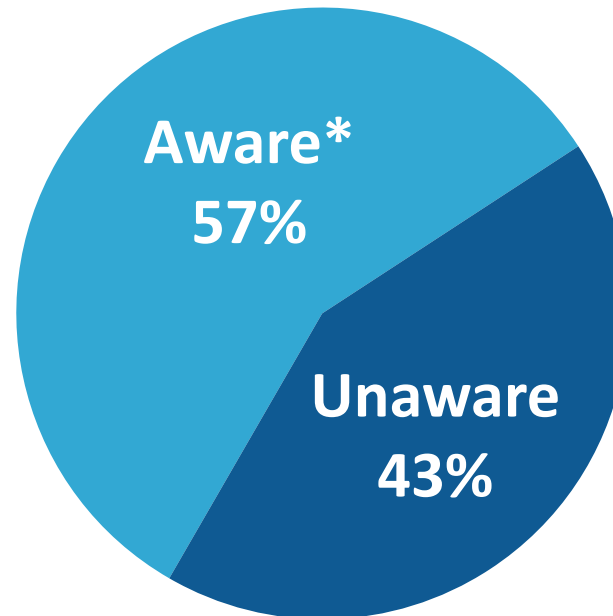
# Awareness of the Ad Campaign

Base: Residents of Kentucky's Advertising Markets

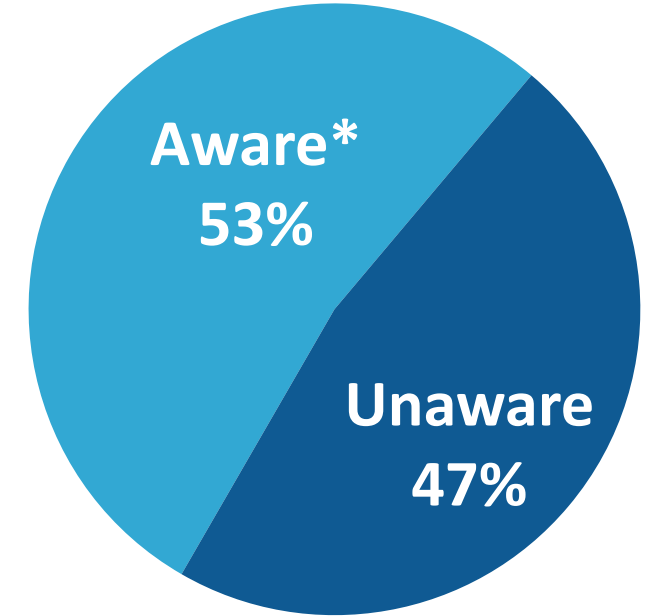
## Total



## Existing Markets



## New Markets



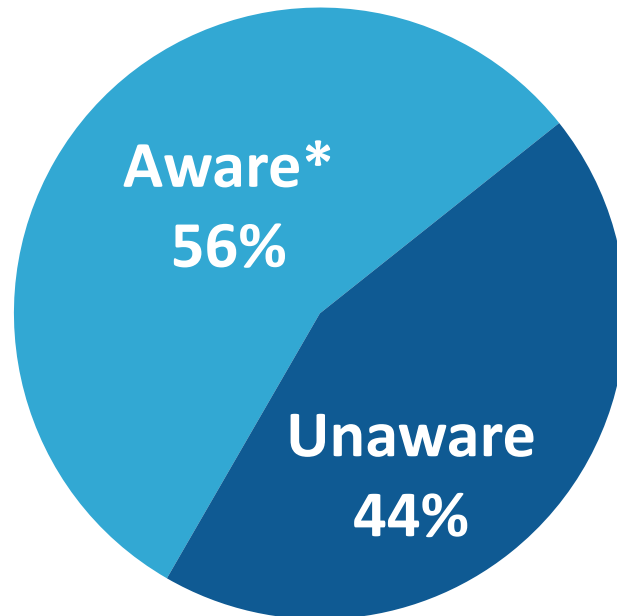
\*Saw at least one ad



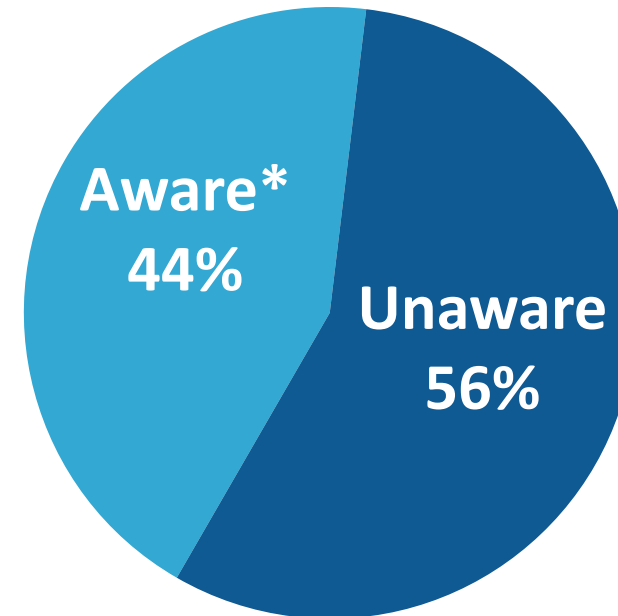
# Awareness of the Ad Campaign – Total Markets 2022 vs. 2021

Base: Total

**2022**



**2021\*\***

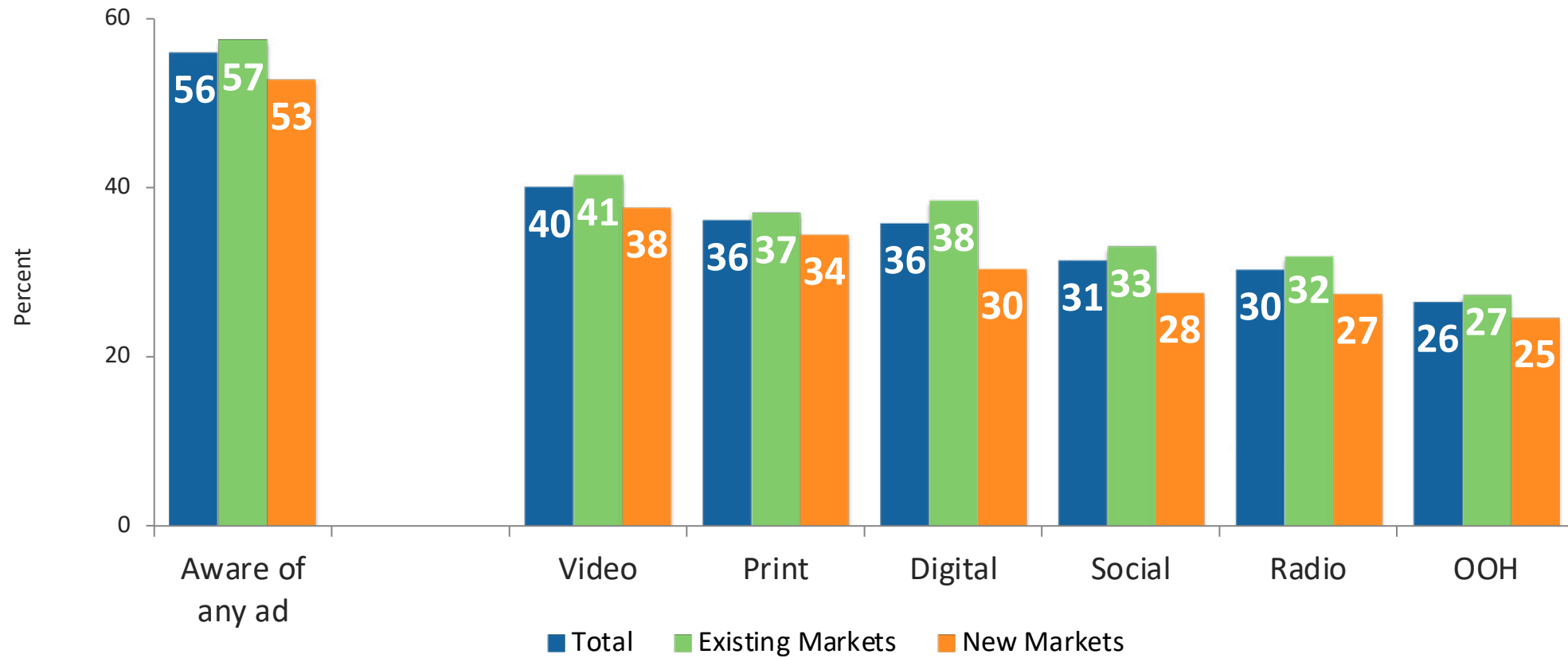


\*Saw at least one ad

\*\*Existing + New Market DMAs 2021: Bowling Green; Cincinnati; Evansville; Knoxville; Lexington; Louisville; Memphis; Nashville; Paducah-Harrisburg DMA (KY only); Indianapolis; Columbus, OH; Chicago; Atlanta; Saint Louis; Tri-Cities (KY only); Charleston/Huntington (KY only); 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

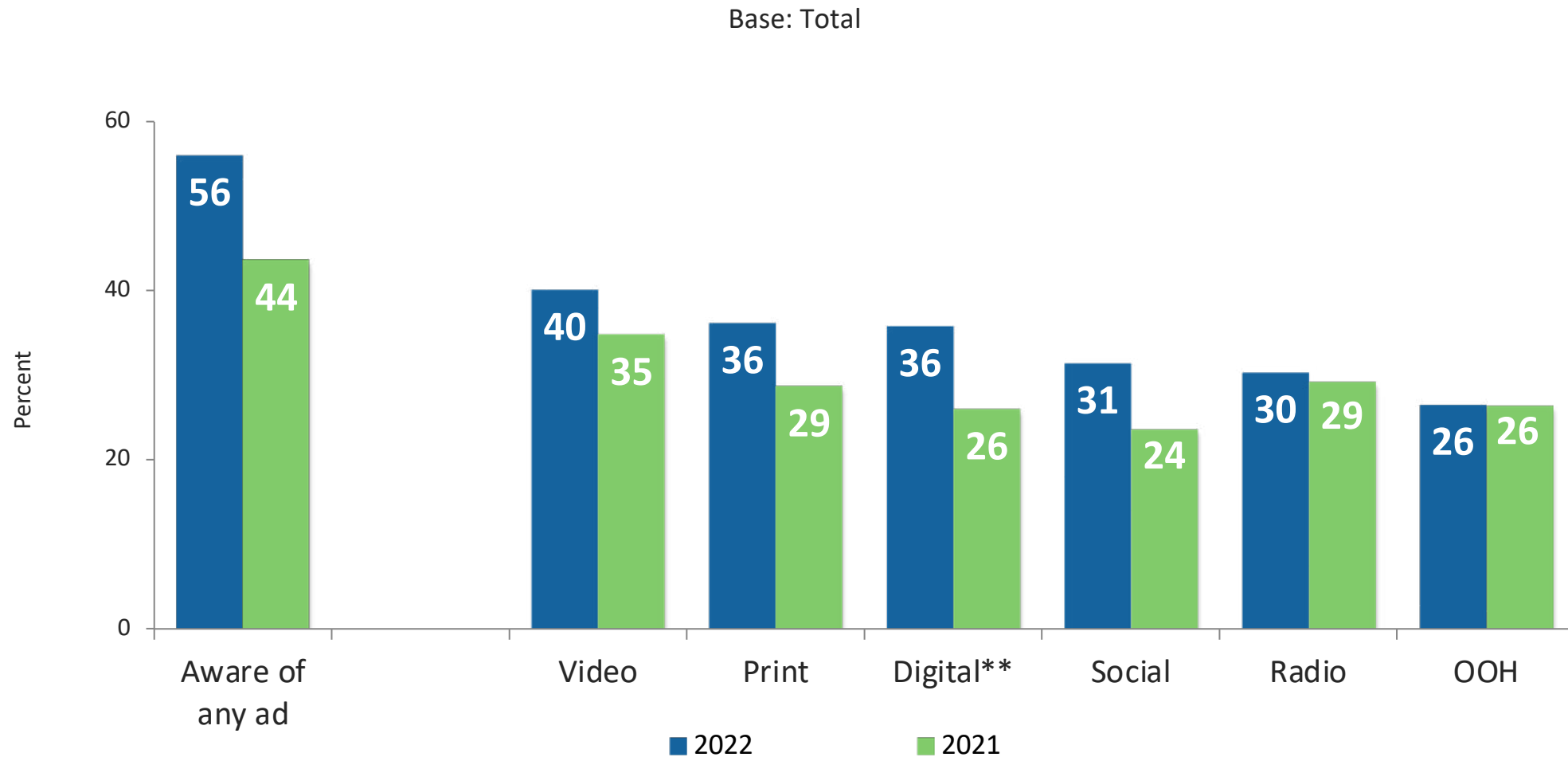
Base: Residents of Kentucky's Advertising Markets



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



# Advertising Awareness\* by Medium - Total Markets 2022 vs. 2021

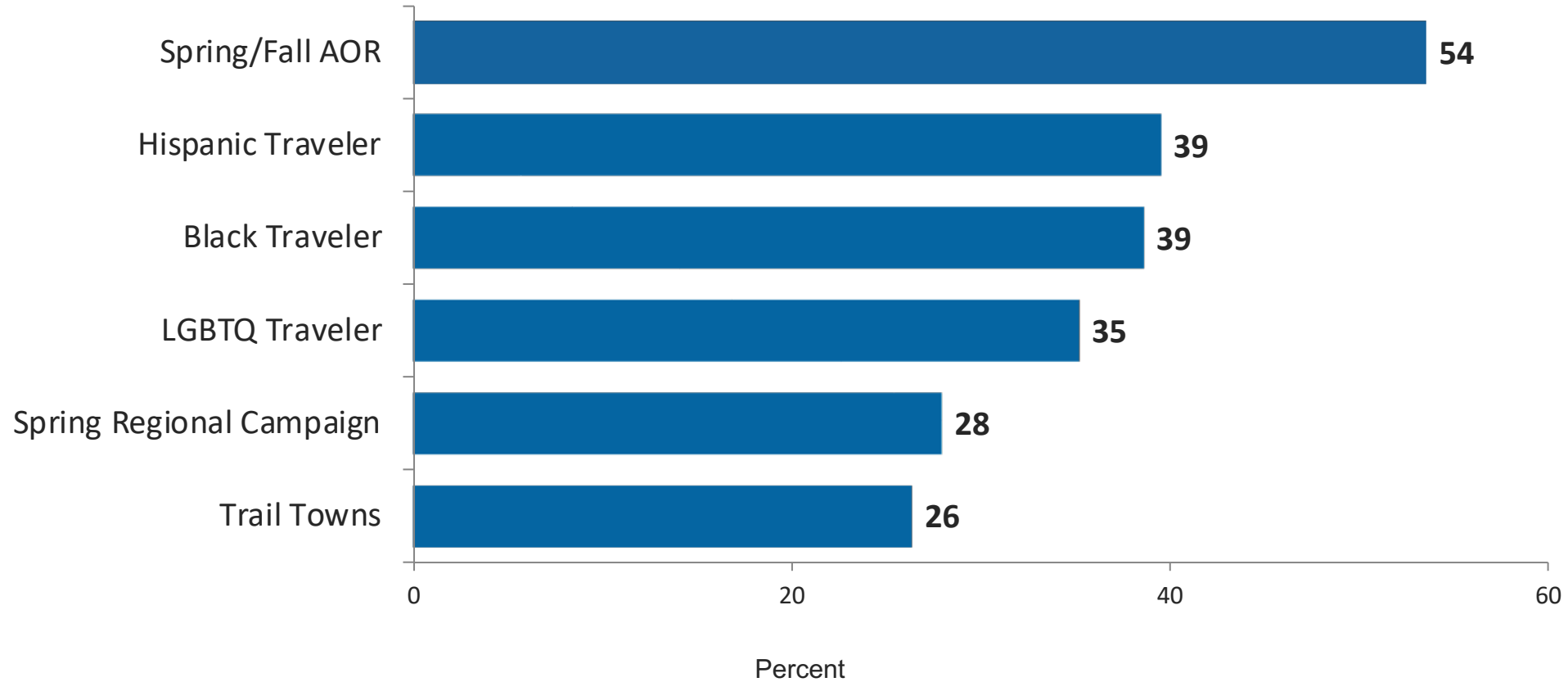


\*Saw at least one ad and based on markets where shown

\*\*In 2021, the 'Digital' medium was labeled as 'Banner'

# Advertising Awareness\* by Campaign

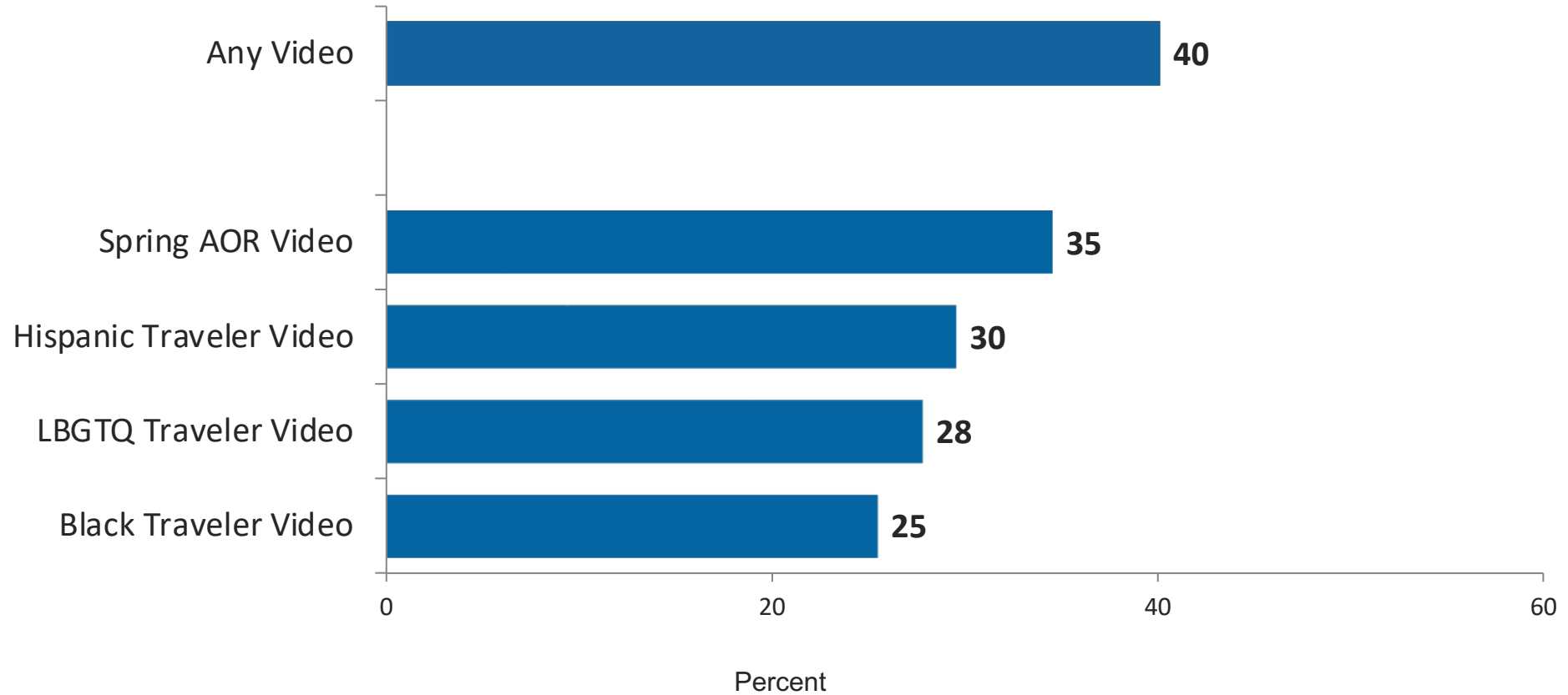
Base: Based on markets where shown



\*Saw at least one ad

# Awareness of Individual Ads - Video

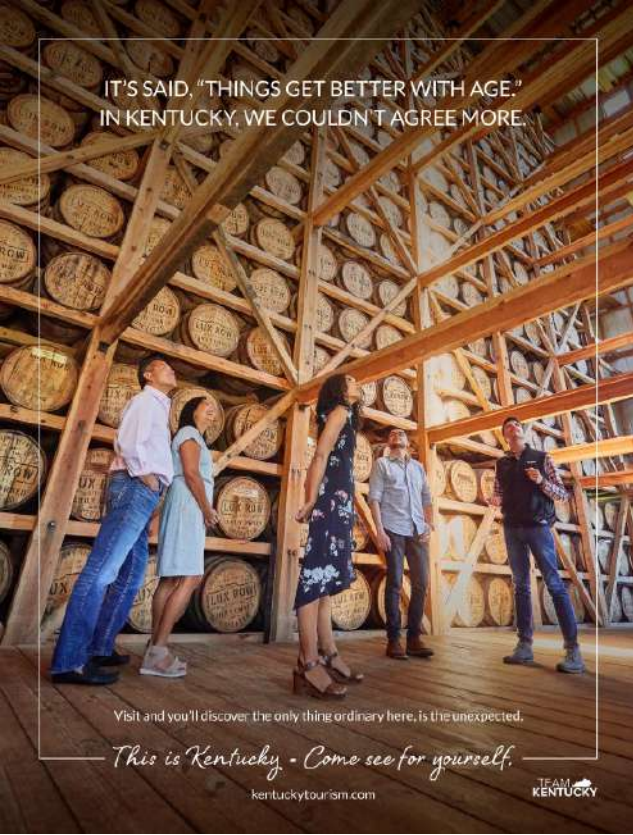
Base: Based on markets where shown



# Print Creative

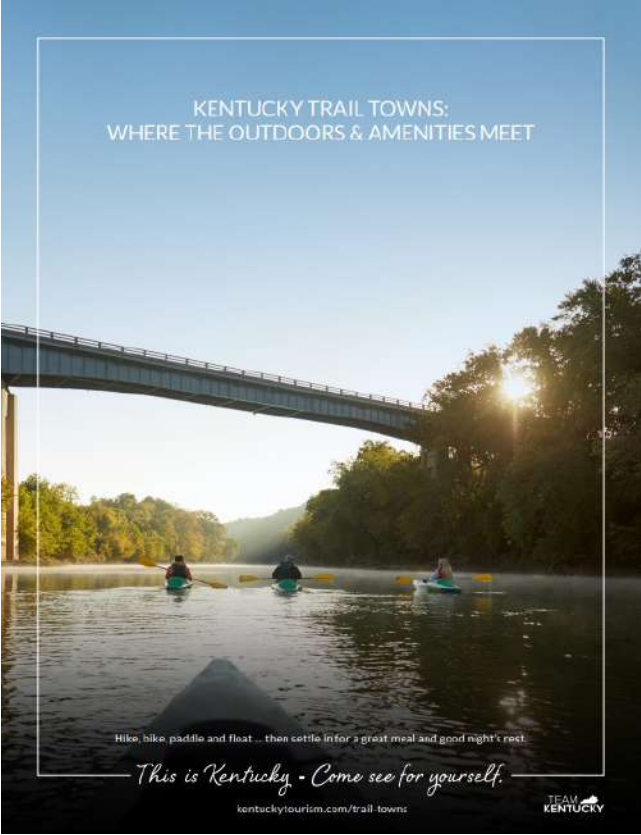


Spring AOR Dome Town  
Print/Spring Fall AOR Dome Town  
Print/Black Traveler Print



Spring AOR Rickhouse Print

# Print Creative (Cont'd)



Trail Towns Print



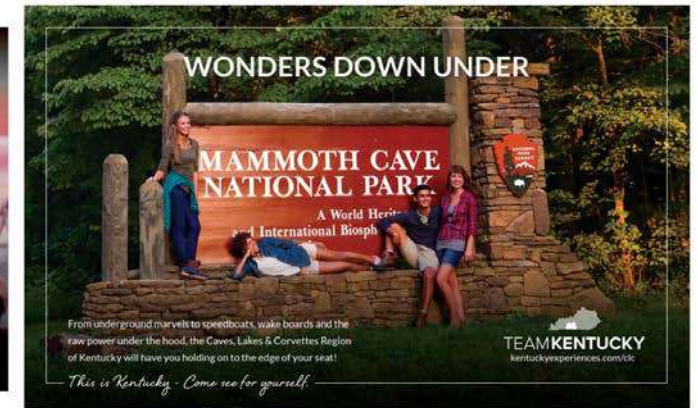
Fall AOR Bourbon Print



# Print Creative (Cont'd)



Spring AOR Tubing Print



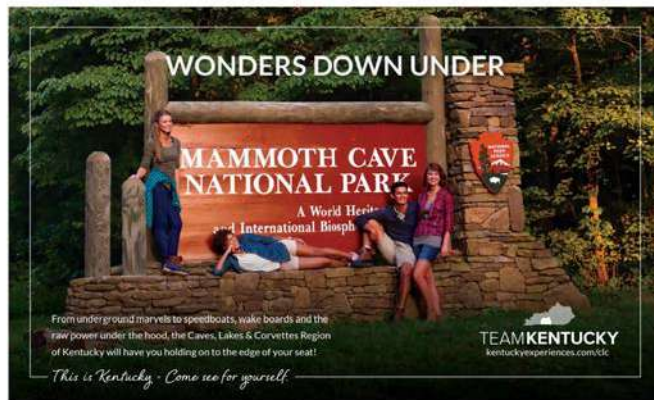
BBB & CLC Print Compilation



Hispanic Traveler Print



# Print Creative (Cont'd)

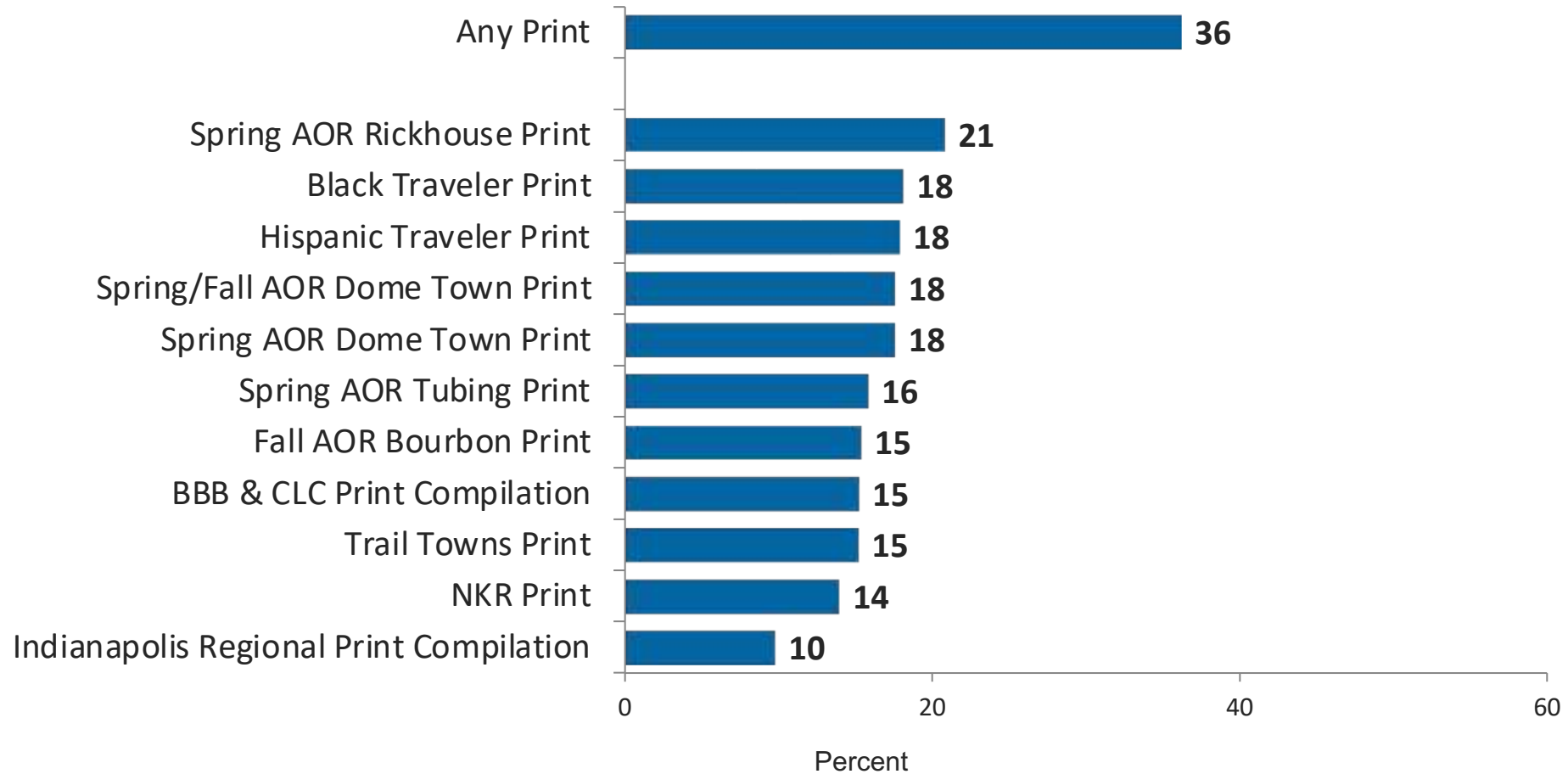


Regional Indianapolis Print Compilation

NKR Print

# Awareness of Individual Ads - Print

Base: Based on markets where shown





# Digital Creative



Hispanic Traveler Digital



Nashville Regional Compilation



Dayton Regional Ad

# Digital Creative (Cont'd)



Trail Towns Digital Compilation



Evansville Knoxville Regional Compilation



Chicago Regional Ad



# Digital Creative (Cont'd)



Black Traveler Digital Compilation



Columbus Regional Compilation



Spring AOR Digital Compilation



# Digital Creative (Cont'd)



Cincinnati Indianapolis Regional Compilation



Fall AOR Digital Compilation

# Digital Creative (Cont'd)



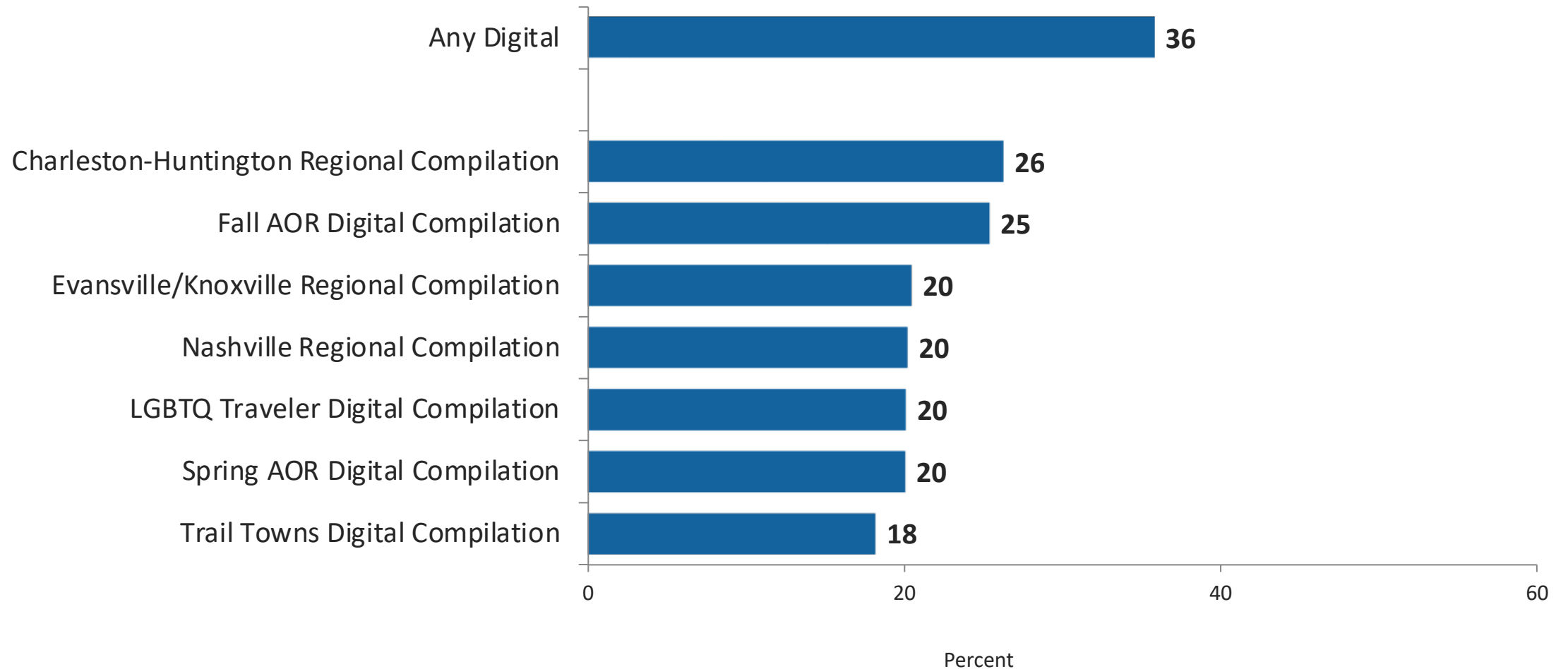
Charleston-Huntington Regional Compilation



LGBTQ Traveler Digital Compilation

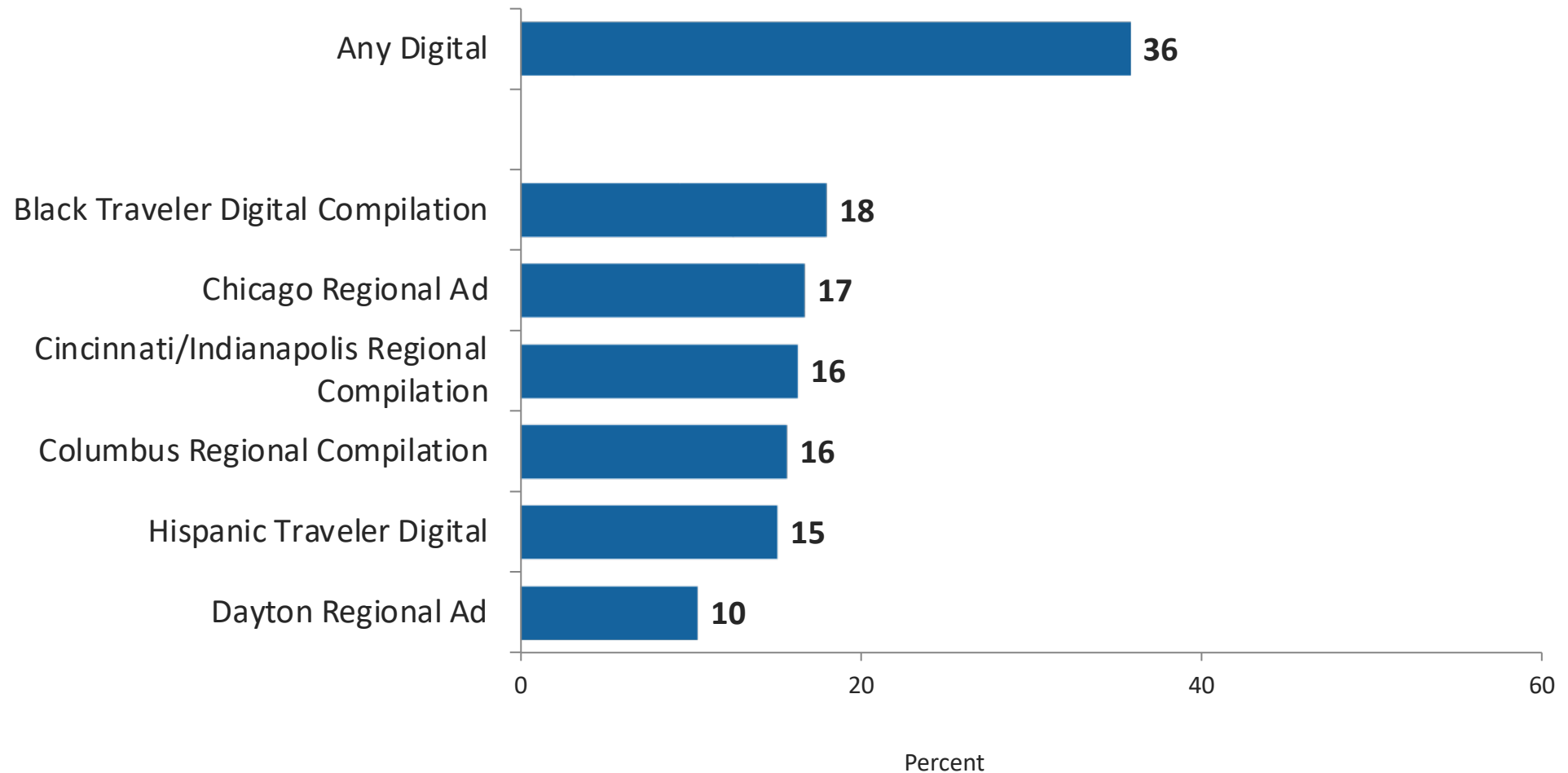
# Awareness of Individual Ads - Digital

Base: Based on markets where shown



# Awareness of Individual Ads – Digital (Cont'd)

Base: Based on markets where shown





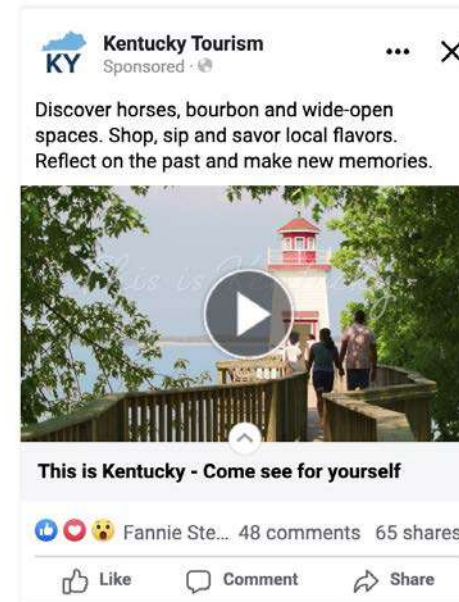
# Social Creative



Hispanic Traveler Social Compilation



Black Traveler Social Compilation





# Social Creative (Cont'd)

Kentucky Tourism Sponsored · KY

Explore the beautiful outdoors, then enjoy a great meal and a good night's rest.





kentuckytourism.com  
**Paddle Along Pristine Waters!** [Learn more](#)

Like Comment Share

Kentucky Tourism Sponsored · KY

Kentucky's 25 Trail Towns bring you the best outdoor recreation and small town comforts.



**Hit the Trail to Family Fun** [Learn more](#)  
Kentucky Trai...

**Paddle Pristine**  
Kentucl

Albert Ben Wilson and 2... 2 Shares

Like Comment Share

Trail Towns Social Compilation

Kentucky Tourism Sponsored · KY

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

Fall AOR Social Compilation

Kentucky Tourism Sponsored · KY

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](#)

# Social Creative (Cont'd)

**Kentucky Tourism** KY Sponsored · 🌐

Explore the Bluegrass State's unique natural wonders, charming towns, horse farms and bourbon distilleries.



**Horse country, up close**  
This is Kentu... [Learn more](#)

**One-of-a-kind attractions**  
This is |

👍❤️👍 Maria Mat... 42 comments 44 shares

👍 Like    💬 Comment    ➦ Share

**Kentucky Tourism** KY Sponsored · 🌐

Explore the Bluegrass State's unique natural wonders, charming towns, horse farms and bourbon distilleries.



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

👍❤️👍 Janie Gross a... 83 comments 80 shares

👍 Like    💬 Comment    ➦ Share

**Kentucky Tourism** KY Sponsored · 🌐

Tour beautiful horse farms and historic bourbon distilleries, then explore the Bluegrass State's stunning outdoors!





**Enjoy Kentucky horse country**  
This is Kentu... [Learn more](#)

**Experience bourbon**  
This is |

**Kentucky Tourism** KY Sponsored · 🌐

Find Kentucky's best seasonal events, small town escapes and hidden gems to explore in our monthly e-newsletter.



**Upcoming Events**  
Sign Up for Kentucky e-News [Sign up](#)

**Local Dining**  
Sign Up for Kentucky e-News

👍❤️👍 218    5 comments 23 shares

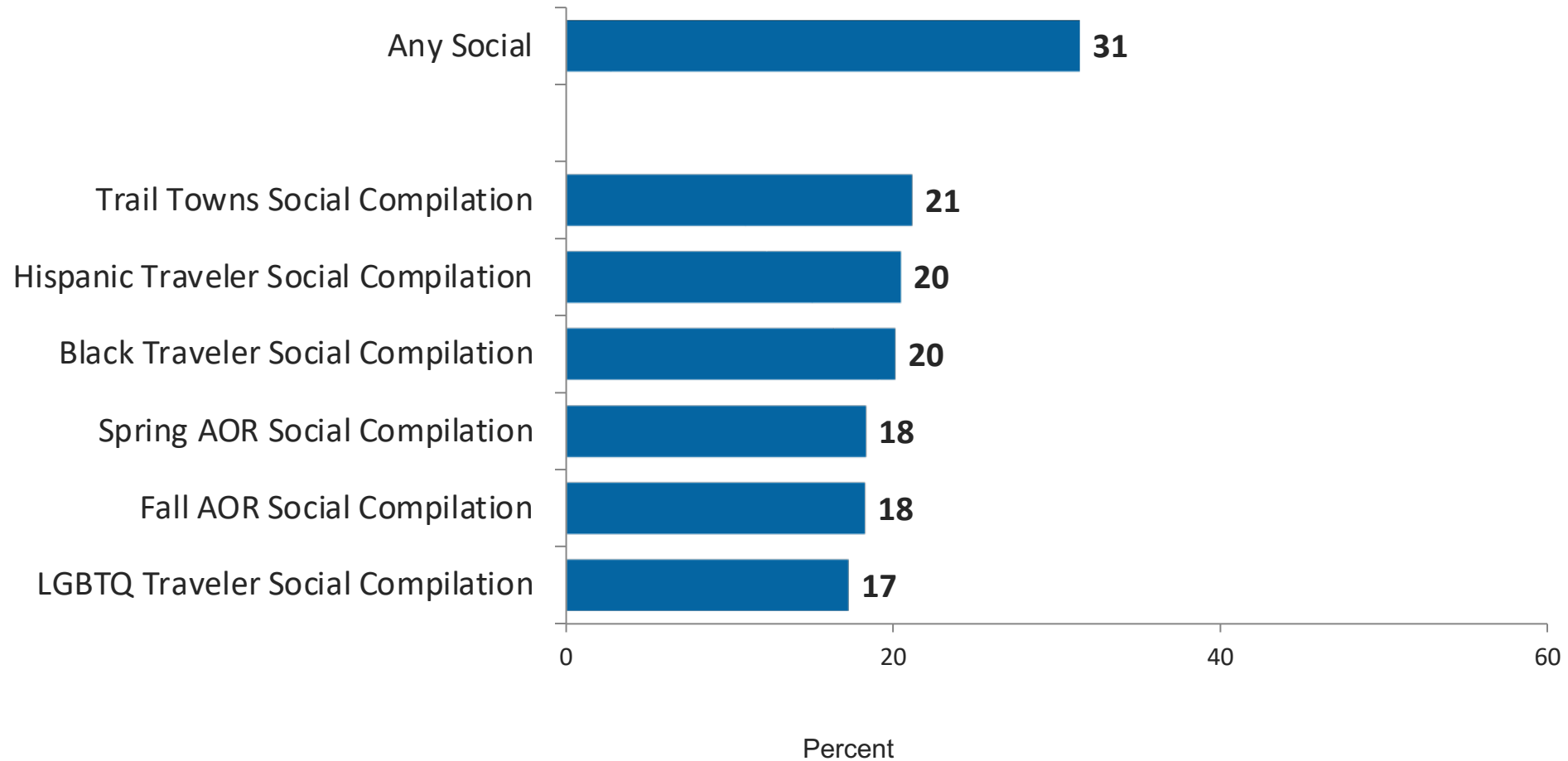
👍 Like    💬 Comment    ➦ Share

LGBTQ Traveler Social Compilation

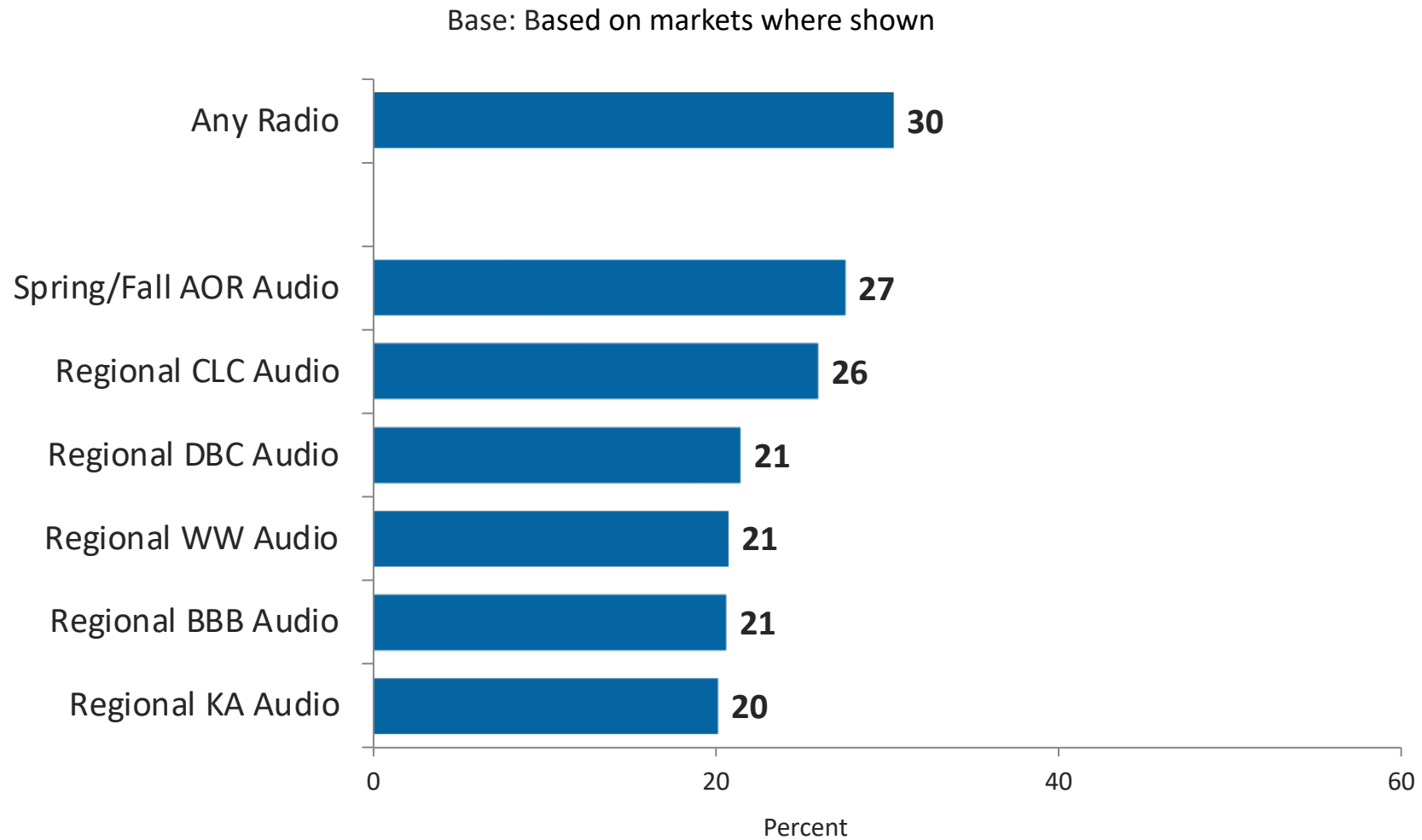
Spring AOR Social Compilation

# Awareness of Individual Ads – Social

Base: Based on markets where shown



# Awareness of Individual Ads – Radio





# Out-of-Home Creative



Fall OOH Digital Compilation 2



Spring AOR OOH 1



Spring AOR OOH 2



# Out-of-Home Creative



Fall OOH Digital Compilation 1

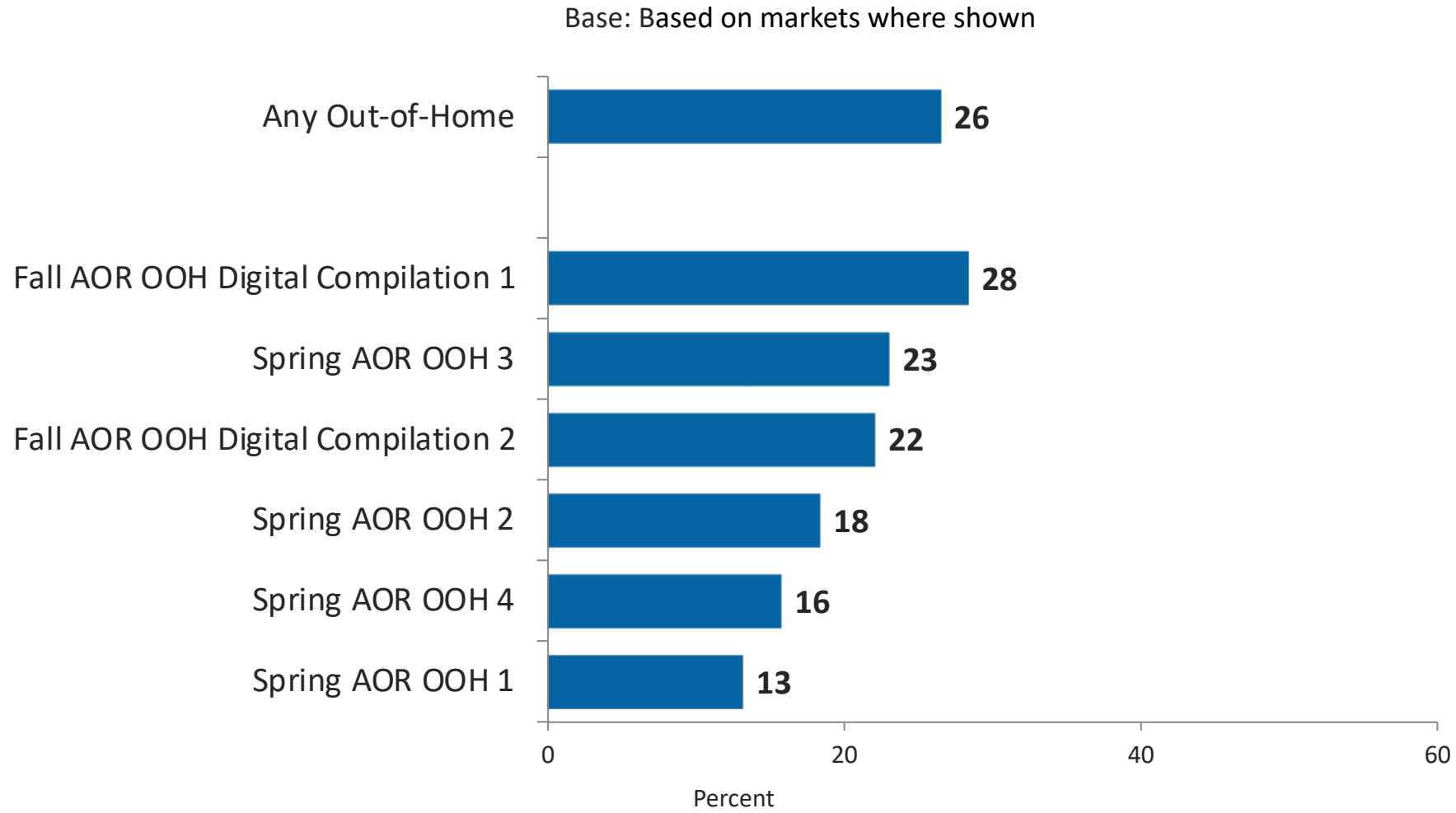


Spring AOR OOH 3



Spring AOR OOH 4

# Awareness of Individual Ads – Out-of-Home

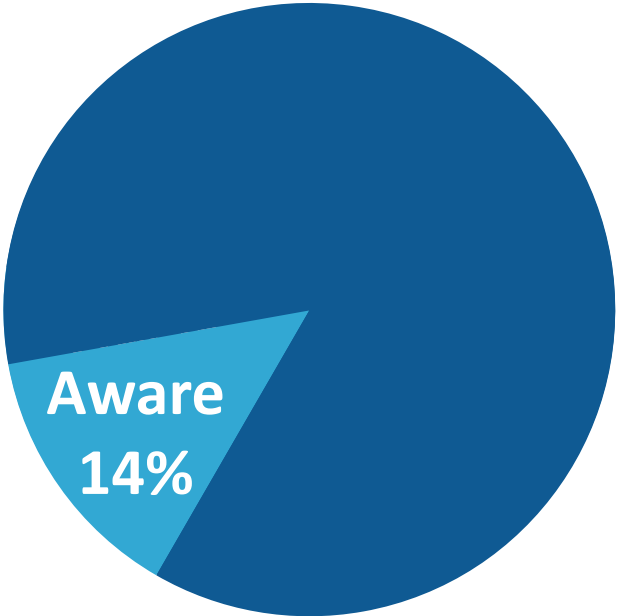




# Kentucky Tourism Website

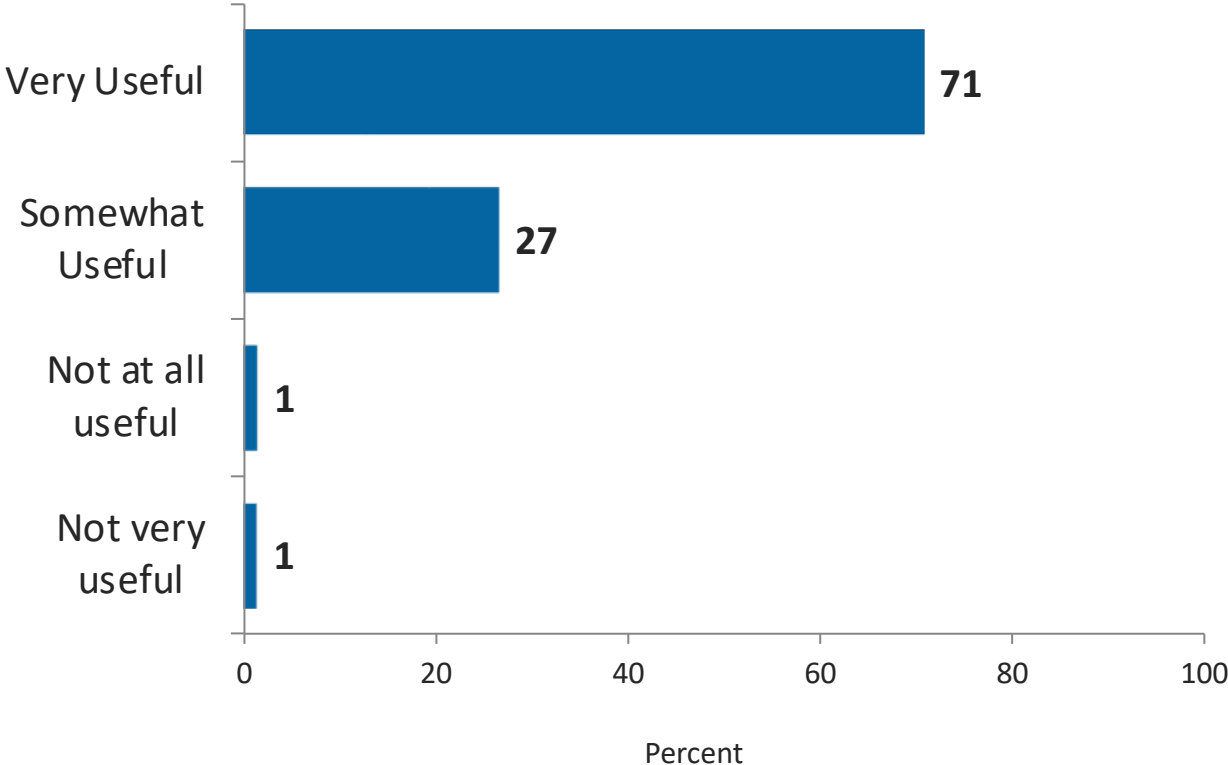
Base: Total

## Awareness of Website

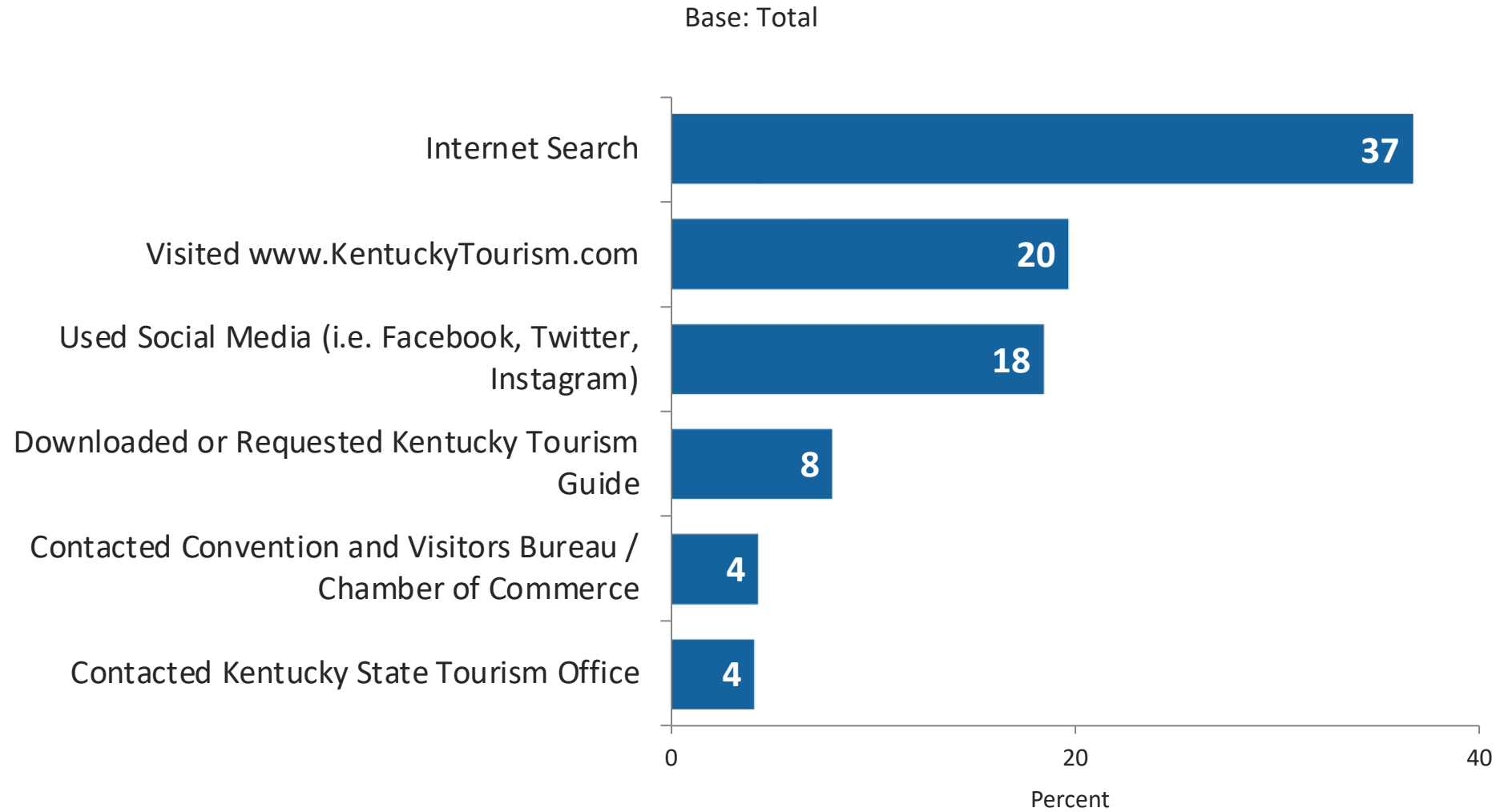


2021: Visited Website 19%

## How useful was the Kentucky Tourism website?



# Actions Taken to Obtain Information about Traveling to Kentucky



**Kentucky Tourism**  
Sponsored · 🌐

Run and play in the Bluegrass State's outdoor wonderland, full of scenic beauty above and below ground!



kentuckytourism.com  
**Enjoy adventures from mild to wild!** [Learn more](#)

👍 Like    💬 Comment    ➦ Share

**Kentucky Tourism**  
Sponsored · 🌐

Discover horses, bourbon, and family fun.



**Come see Kentucky for yourself**

🌐❤️😄 Mere Mor... 19 comments 18 shares

👍 Like    💬 Comment    ➦ Share

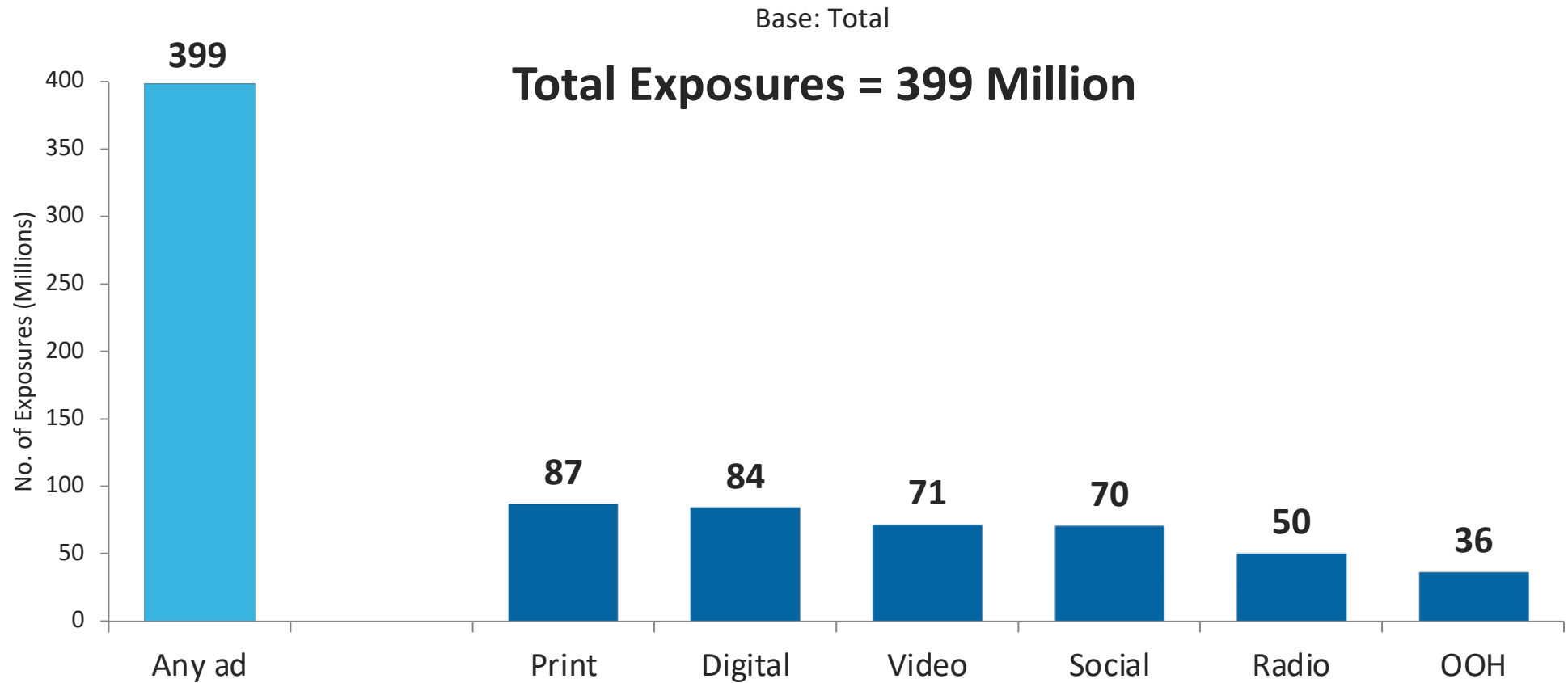
**Longwoods**  
INTERNATIONAL

# Media Diagnostics

# Media Diagnostics

- In the markets included in this study, there were an estimated 399 million recalled ad exposures over the campaign period, 1 million more than achieved in 2021.
  - Print (87 million exposures) and digital ads (84 million exposures) showed highest frequency of recall, followed by video (71 million exposures), social (70 million exposures), radio (50 million exposures) and OOH ads (36 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:
  - The 2022 campaigns had a cost of \$16 per thousand of exposures recalled, a significant improvement over 2021's \$21.
  - Social media and print ads constituted the most efficient mediums in terms of generating recall per dollar spent, at \$7 and \$8 per thousand of exposures recalled, respectively.
  - Radio (\$15 per thousand of exposures recalled) and OOH (\$18 per thousand of exposures recalled) were the second-most effective media.
  - Video and digital were the least efficient at generating recall (\$25 per thousand exposures recalled each).

# Total Exposures Recalled by Medium



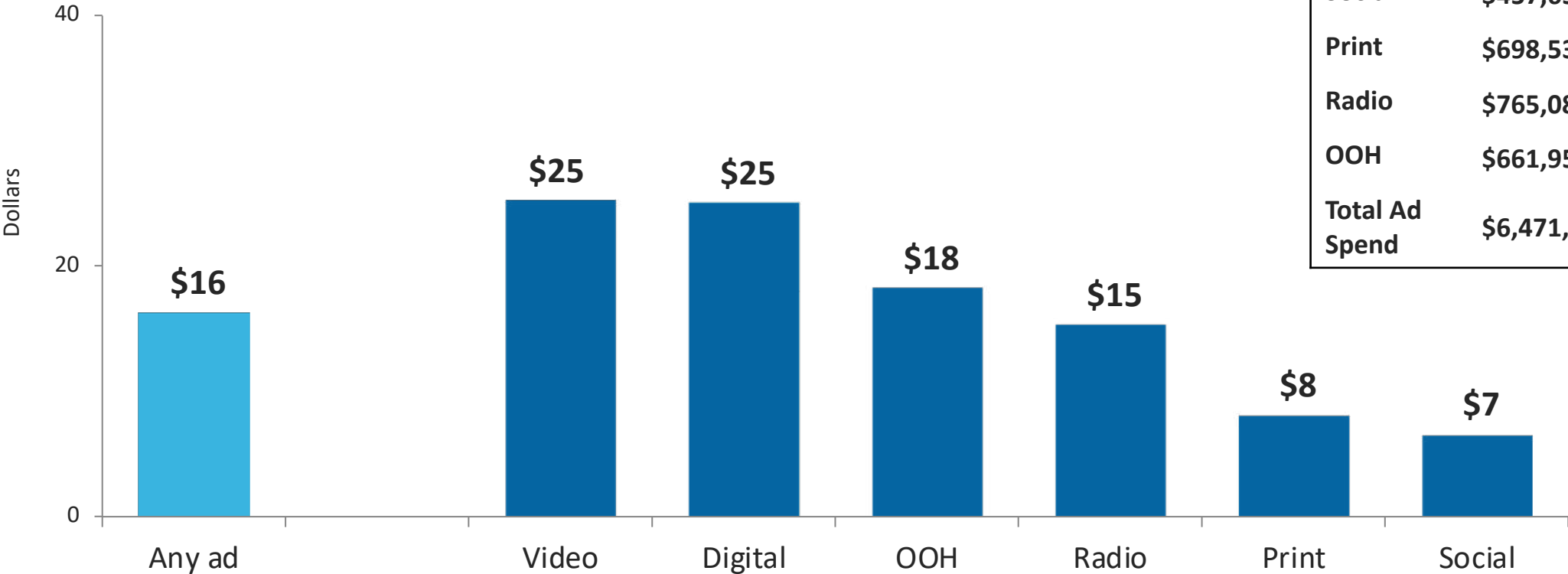
\*Incidence of awareness x population aware x mean frequency recalled  
2021: 398 Million Total Exposures

# Cost per Thousand Exposures Recalled – by Medium

Base: Total

**Total Exposures = 399 Million**

	Total
Digital	\$2,092,192
Video	\$1,795,638
Social	\$457,657
Print	\$698,538
Radio	\$765,087
OOH	\$661,953
<b>Total Ad Spend</b>	<b>\$6,471,064</b>



2021: Any Ad \$21  
 2021: 398 Million Total Exposures



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**Short Term  
Conversion**



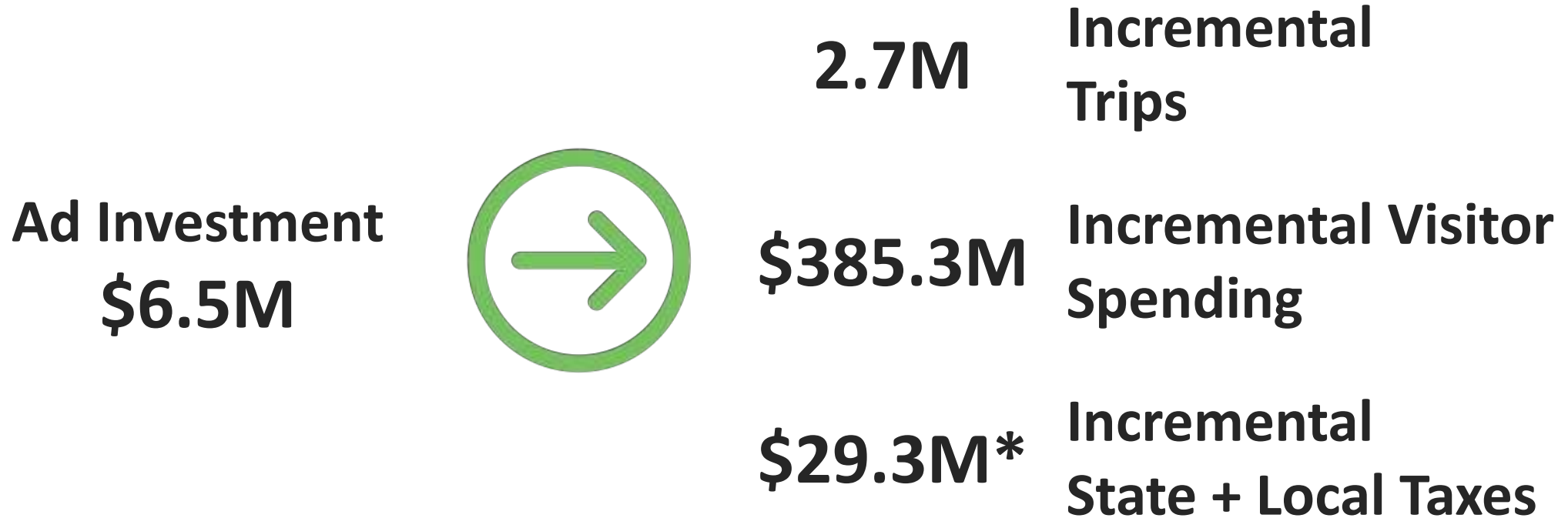
# Short-Term Conversion

- The campaigns included in this study produced an additional 2.7 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising.
  - 2.2 million of those incremental trips were from existing markets, and 0.4 million from new markets.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$385.3 million on those trips.
  - When related to advertising costs of \$6.5 million, this translates into a return on investment of \$60 in visitor spending for each ad dollar spent.
  - \$308.8 million of that incremental spending came from existing markets, and when related to advertising costs of \$4.9 million, results in a spending ROI of \$63 for every advertising dollar spent.
  - \$76.5 million of that incremental spending came from new markets, and when related to advertising costs of \$1.6 million, results in a spending ROI of \$49 for every advertising dollar spent.
- The total market spending ROI of \$60 is tied with 2018 for the second-best result in the five years Kentucky has conducted this survey with Longwoods.

# Short-Term Conversion (Cont'd)

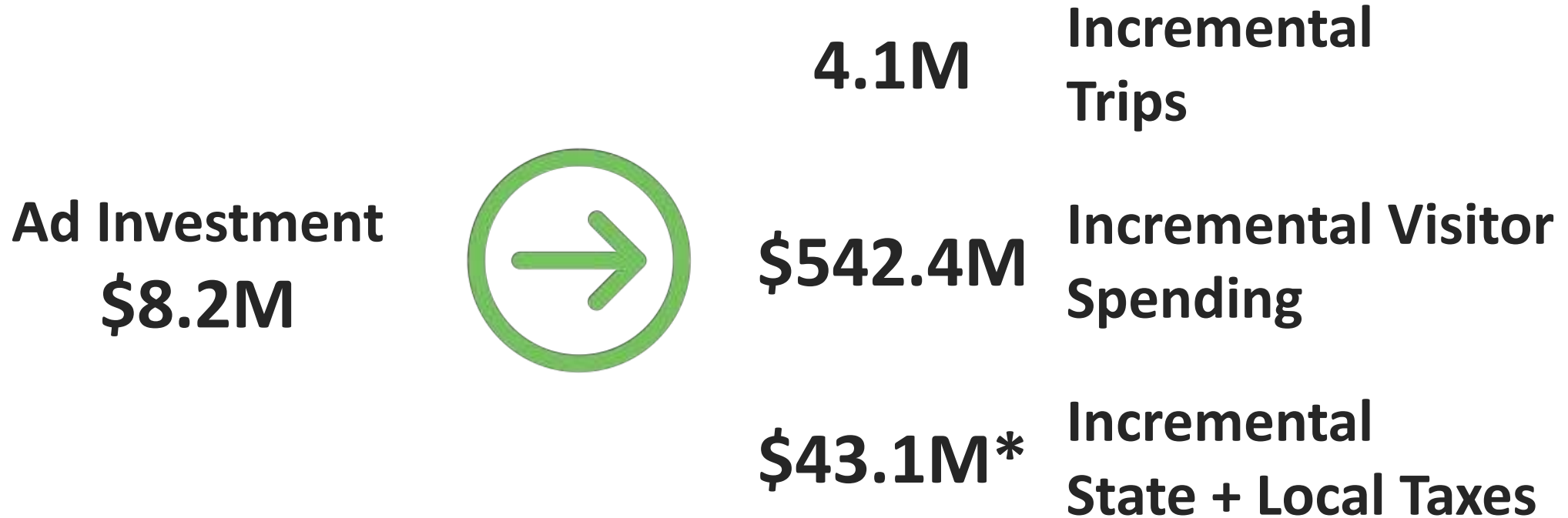
- Looking at total markets, KDT spent \$2.42 for every incremental trip taken. This is up from 2021's \$2.00.
  - The price per trip in existing markets was \$2.19 and \$3.61 in new markets.
- Those incremental expenditures in total advertising markets yielded \$29.3 million in state and county taxes. There was a return on investment of \$5 in taxes for each ad dollar spent.
  - For existing markets, there was \$23.5 million in incremental state and local taxes, and a tax ROI of \$5.
  - For new markets, there was \$5.8 million in incremental state and local taxes, and a tax ROI of \$4.

# 2022: Short-Term Incremental Trips, Spending and Taxes Due to Advertising



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

# 2021: Short-Term Incremental Trips, Spending and Taxes Due to Advertising



\*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	\$4.9M -17.9% vs. 2021	\$1.6M -31.0% vs. 2021	\$6.5M - 21.5% vs. 2021
Incremental Trips	2.2M -16.5% vs. 2021	0.4M -69.9% vs. 2021	2.7M - 35.1% vs. 2021
Incremental Visitor Spending	\$308.8M -1.7% vs. 2021	\$76.5M -66.5% vs. 2021	\$385.3M - 29.0% vs. 2021
Incremental State + Local Taxes*	\$23.5M -5.8% vs. 2021	\$5.8M -67.9% vs. 2021	\$29.3M - 32.0% vs. 2021

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

# Campaign Efficiency

	Existing Markets	New Markets	Total
Ad \$'s per Trip	\$2.19	\$3.61	\$2.42
Trips per Ad \$	0.46	0.28	0.41

# Campaign Efficiency – Total Markets

	2018	2019	2020*	2021**	2022***
Ad \$'s per Trip	\$ 1.86	\$3.06	\$8.81	\$2.00	\$2.42
Trips per Ad \$	0.54	0.33	0.11	0.50	0.41

\*In-State Only

\*\* Includes 2021 Existing & New Markets

\*\*\*Includes 2022 Existing & New Markets: *Compared to 2021, fielding this study in fewer markets resulted in a 48% decline in the number of travelers potentially exposed to the campaign. The New Markets population of potential visitors dropped 69%, and Existing Markets 21%*

# The Bottom Line in 2022



Every \$1 invested in the 2022 Kentucky advertising campaign generated \$60 in direct visitor spending and \$5 in taxes in the state



# The Bottom Line in 2022

	Existing Markets	New Markets	Total
Spending ROI	\$63	\$49	\$60
Tax ROI	\$5	\$4	\$5

# The Bottom Line – Total Markets

	2018	2019	2020*	2021**	2022***
Spending ROI	\$60	\$39	\$10	\$66	\$60
Tax ROI	\$5	\$3	\$1	\$5	\$5

\*In-State Only

\*\* Includes 2021 Existing & New Markets

\*\*\*Includes 2022 Existing & New Markets: *Compared to 2021, fielding this study in fewer markets resulted in a 48% decline in the number of travelers potentially exposed to the campaign. The New Markets population of potential visitors dropped 69%, and Existing Markets 21%*

# The Bottom Line – Existing and New Markets

## Existing Markets

	2021	2022*
Spending ROI	\$53	\$63
Tax ROI	\$4	\$5

## New Markets

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

*\*2022 Existing & New Markets: Compared to 2021, fielding this study in fewer markets resulted in a 48% decline in the number of travelers potentially exposed to the campaign. The New Markets population of potential visitors dropped 69%, and Existing Markets 21%*



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



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## Destination Hot Buttons



# Travel Motivators

- 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.
  - A great **family atmosphere** – good destination for families that children would enjoy visiting.

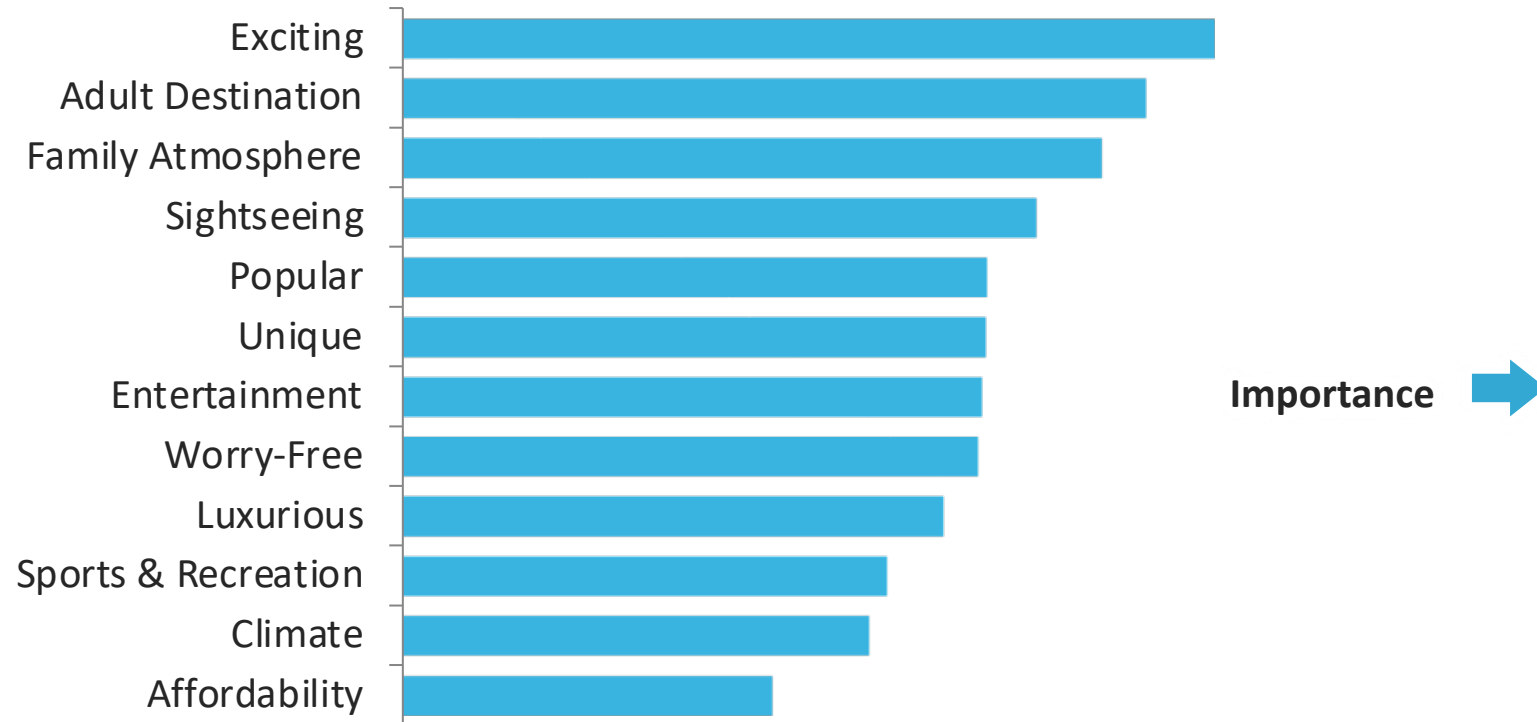
# Travel Motivators (Cont'd)

- 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:
  - 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.
- Lower priorities are:
  - **Sports and recreation**, including bicycling, hiking, water sports such as swimming and kayaking/rafting, and other outdoor recreation.
  - **Climate**.

# Travel Motivators (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.
- The Hot Buttons, or ten individual Image attributes most closely tied to destination selection in Kentucky's overall target markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; a real adventure; good for an adult vacation; lots to see and do; children would enjoy; and popular with travelers.

# 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

A real adventure

Good for an adult vacation

Lots to see and do

Children would enjoy

Popular with travelers

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## Kentucky's Image 2022 vs 2021

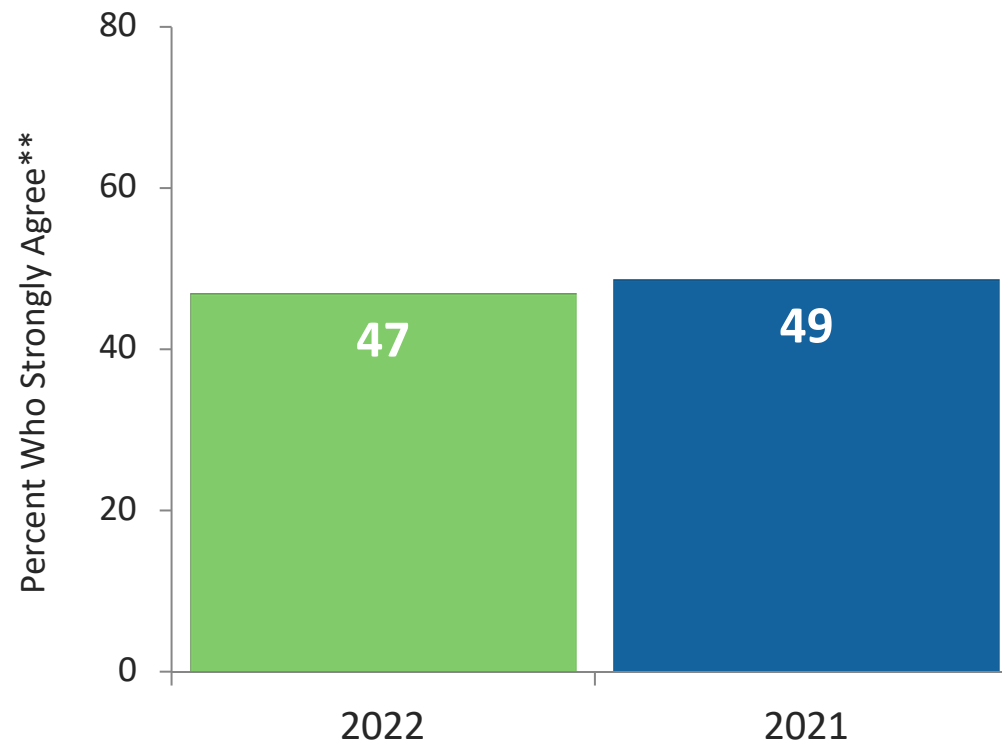
# Kentucky's Image 2022 vs. 2021

- The perception of Kentucky among travelers in the state's total markets as “a place I would really enjoy visiting” has remained steady between 2021 and 2022, with 47% strongly agreeing in 2022.
- Looking at year-over-year image battery results overall, Kentucky's reputation as a leisure destination has mostly remained steady.
- However, the following three Hot Button attributes have declined:
  - A real adventure (down 6 points)
  - A fun place (down 5 points)
  - Popular with travelers (down 5 points)
- The image attribute with the best score is new in 2022 – 65% of travelers strongly agree that Kentucky has unique distillery tours.

# Kentucky's Image 2022 vs. 2021

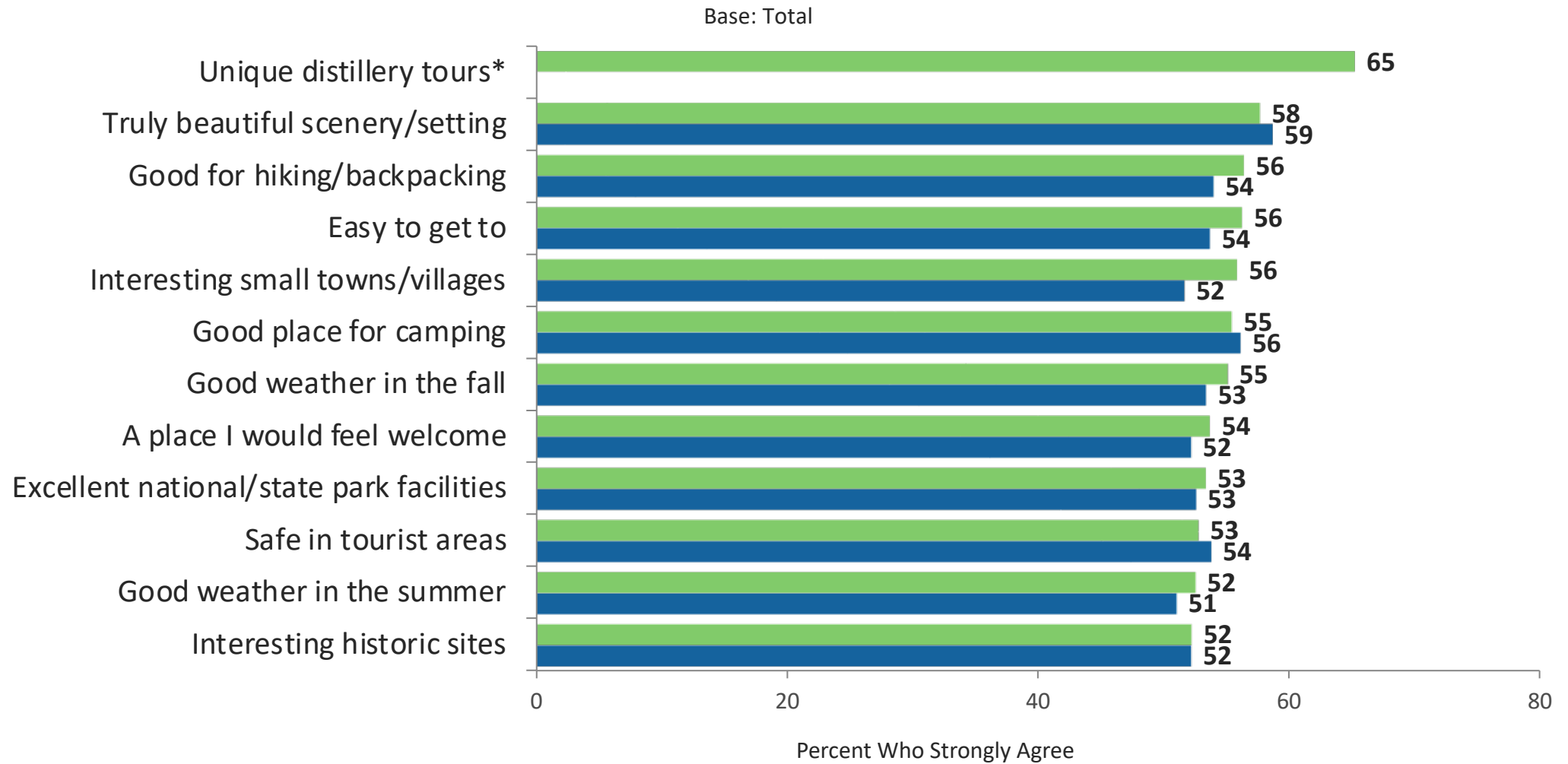
Base: Total

**“A place I'd really enjoy visiting”**



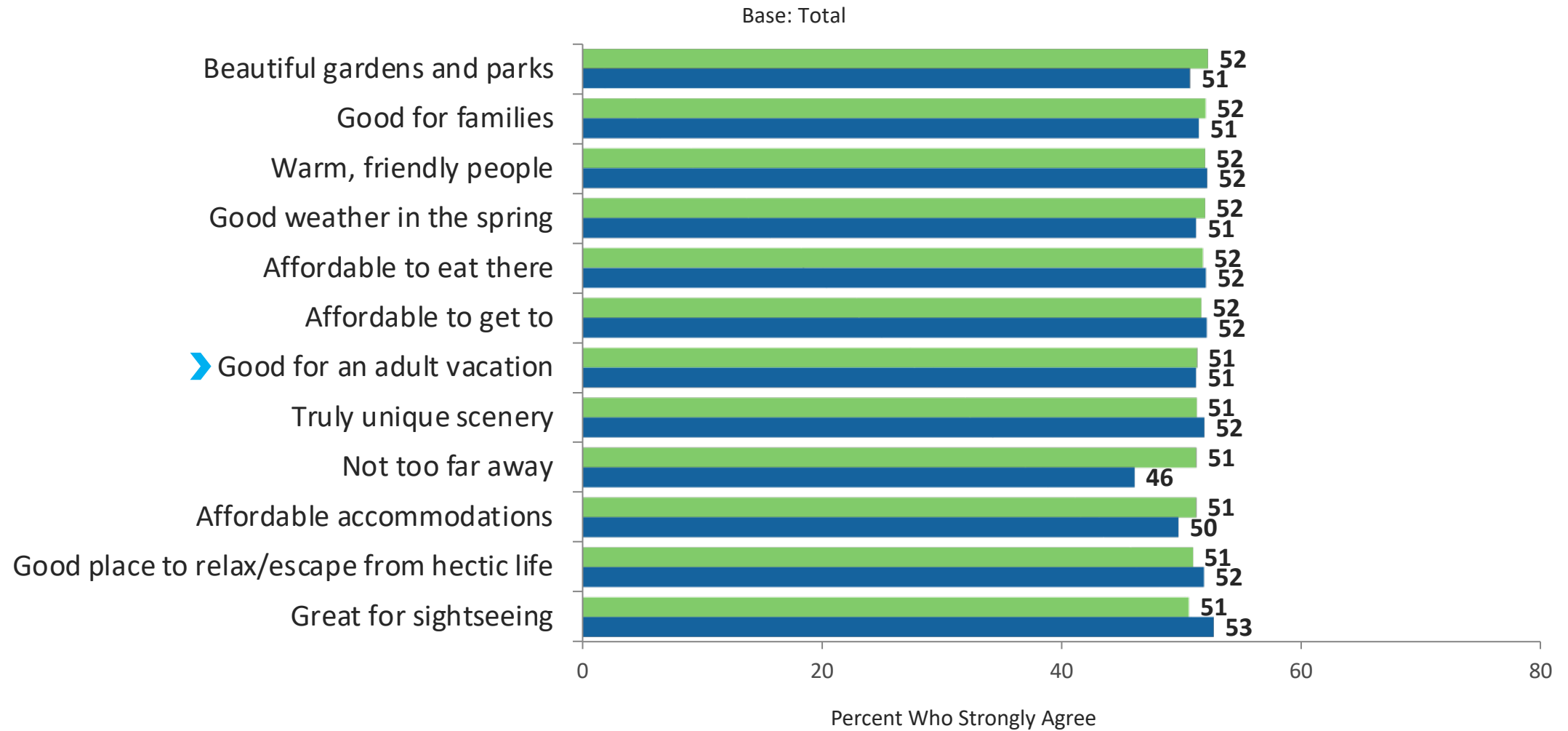
\*\*“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

# Kentucky's Image 2022 vs. 2021



\*Attribute added in 2022

# Kentucky's Image 2022 vs. 2021 (Cont'd)

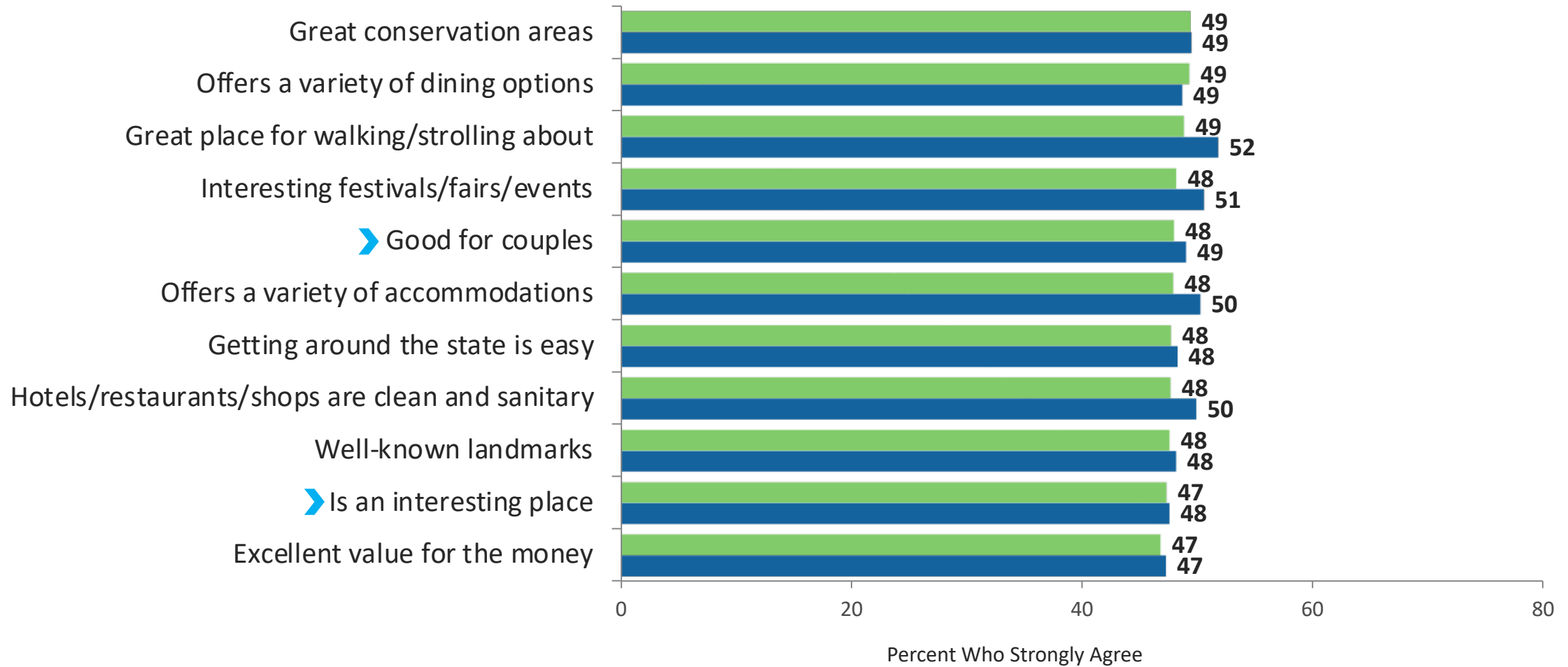


\*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers in 2022



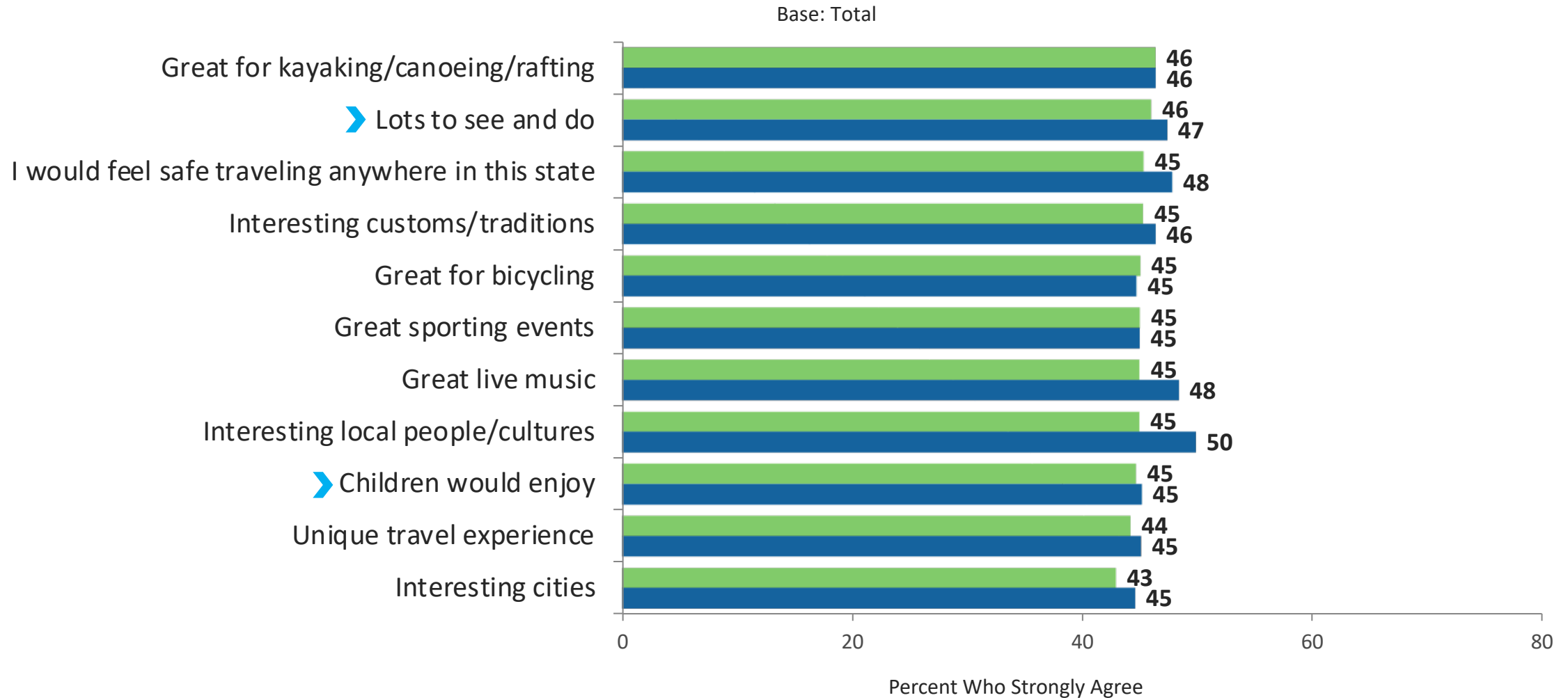
# Kentucky's Image 2022 vs. 2021 (Cont'd)

Base: Total



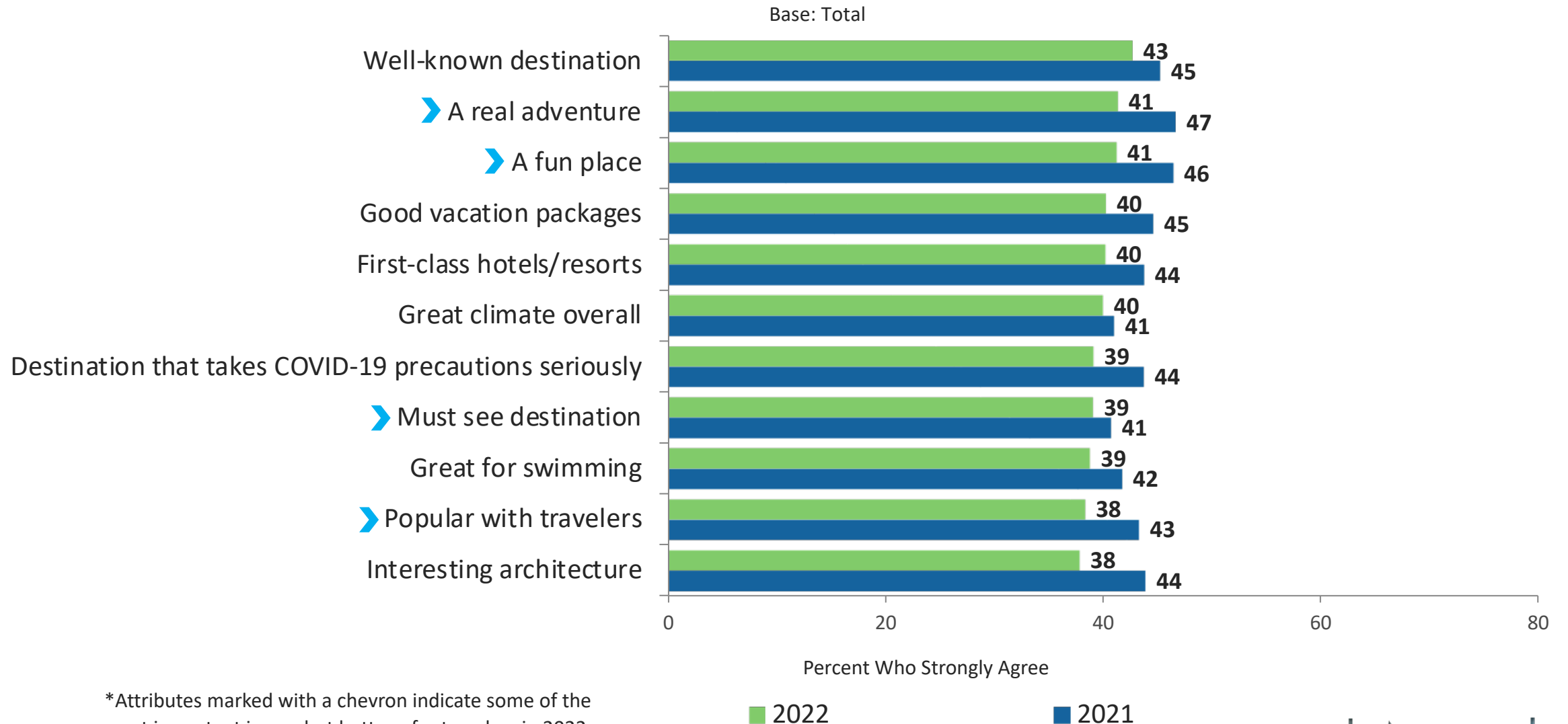
\*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers in 2022

# Kentucky's Image 2022 vs. 2021 (Cont'd)



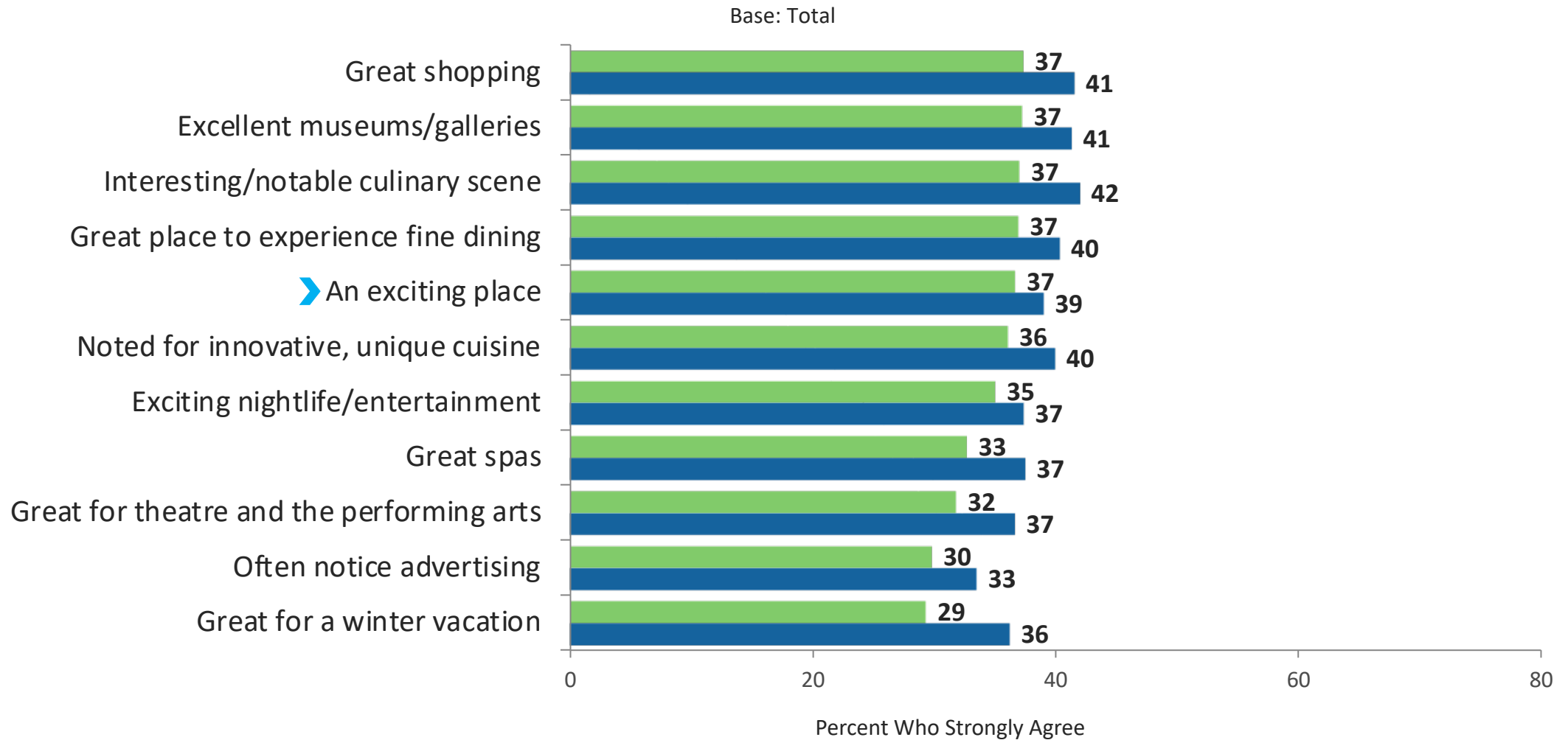
\*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers in 2022

# Kentucky's Image 2022 vs. 2021 (Cont'd)



\*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers in 2022

# Kentucky's Image 2022 vs. 2021 (Cont'd)



\*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers in 2022

**KY** **Kentucky Tourism** Sponsored · 🌐

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



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**KY** **Kentucky Tourism** Sponsored · 🌐

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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 an excellent job of improving people's perceptions of Kentucky for 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 18 point or more lift:
  - A real adventure
  - A fun place
  - Must see destination
  - An exciting place
  - Children would enjoy

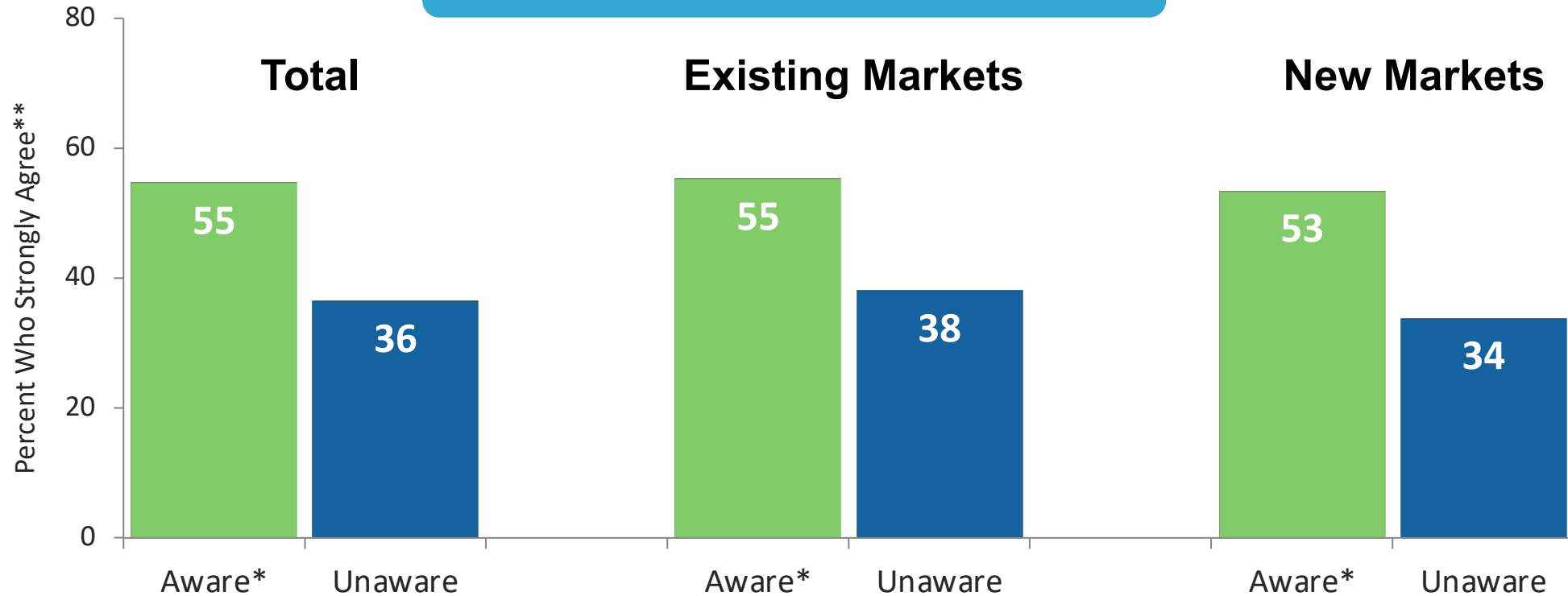
# Advertising Impacts (Cont'd)

- 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”**



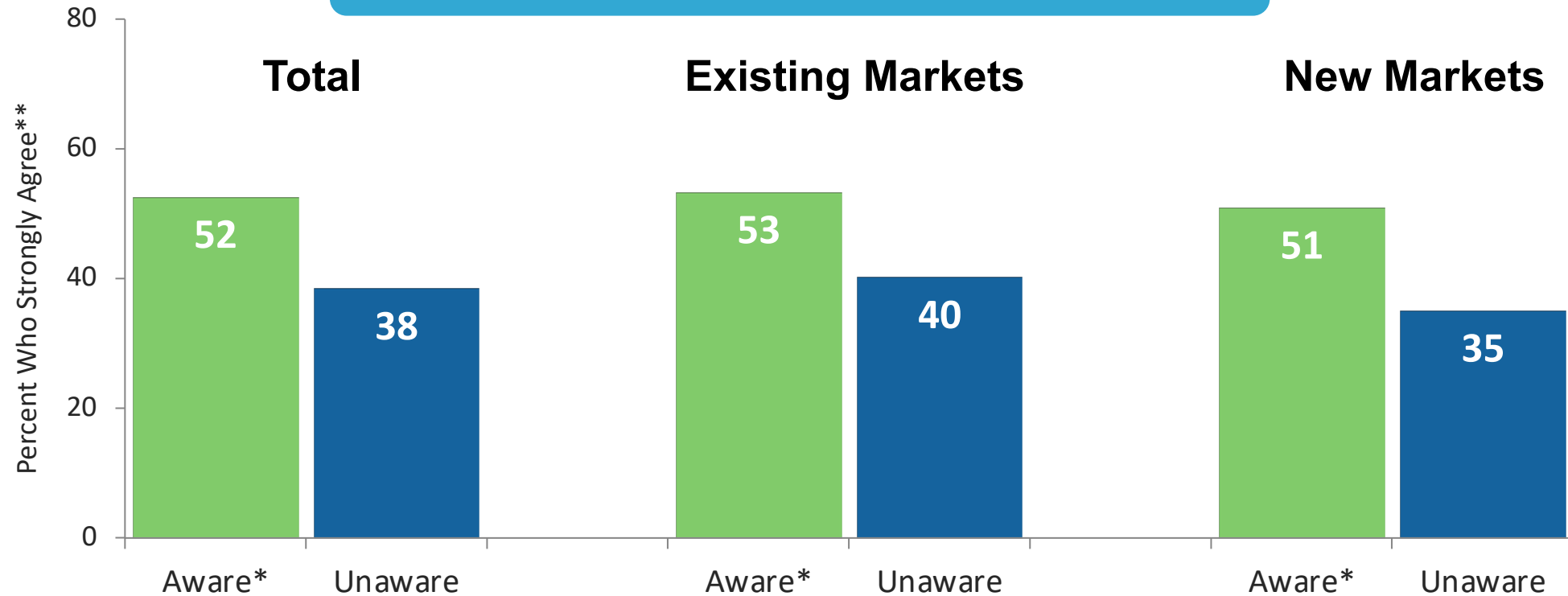
\*Saw at least one ad

\*\*“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

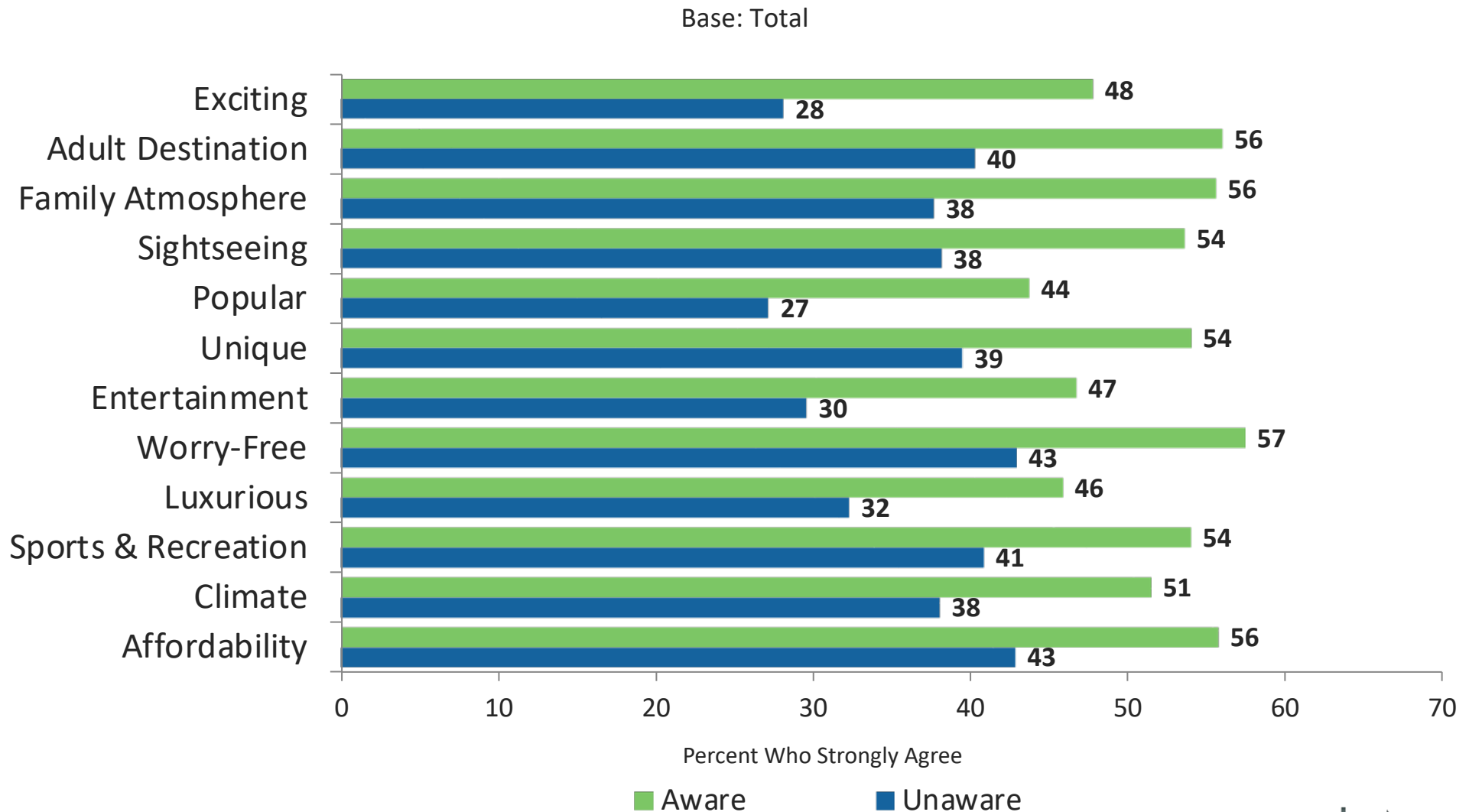
**“Excellent vacation value for the money”**



\*Saw at least one ad

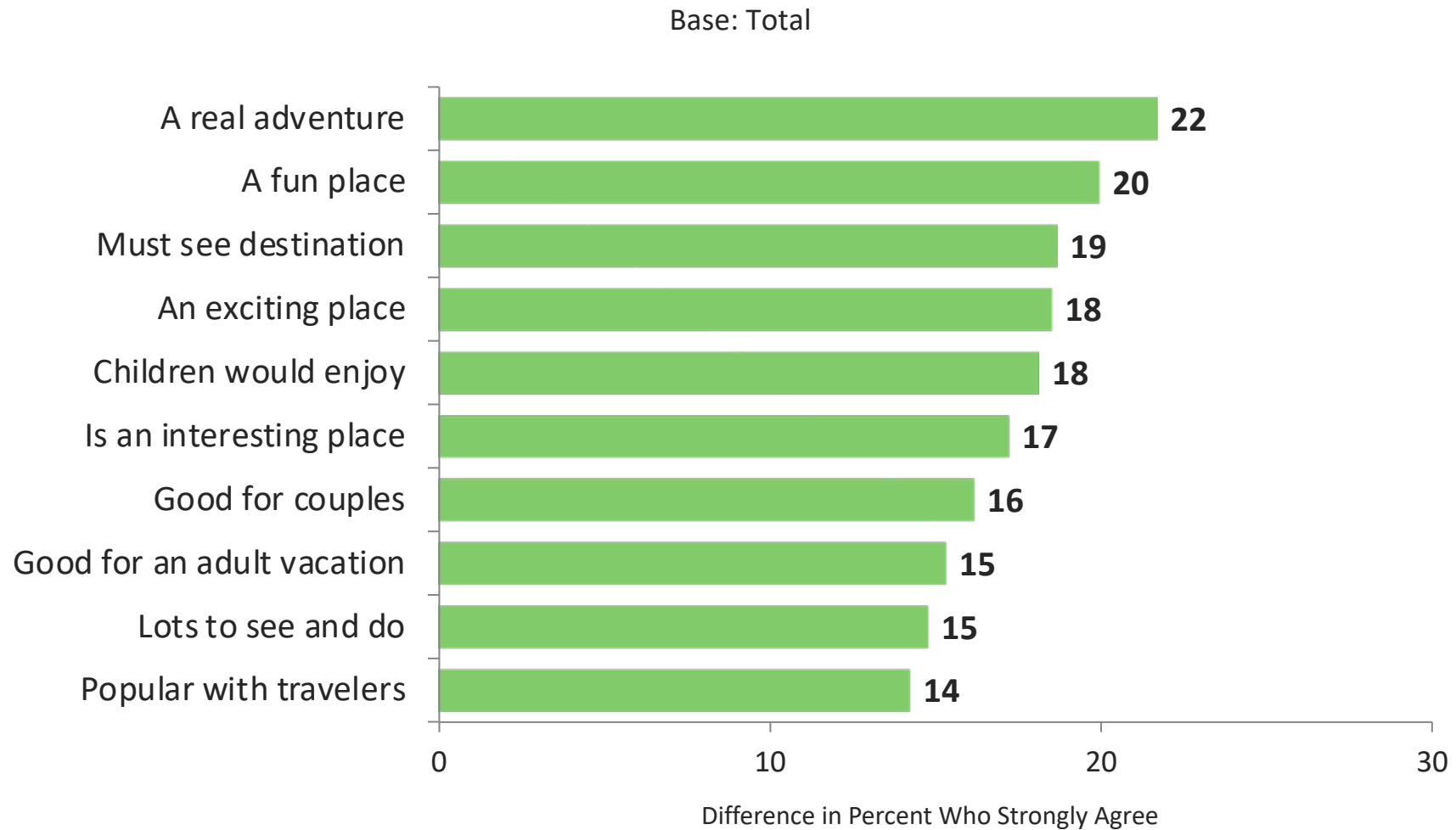
\*\*“Percent who strongly agree” is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

# Advertising Impact on Kentucky's Image

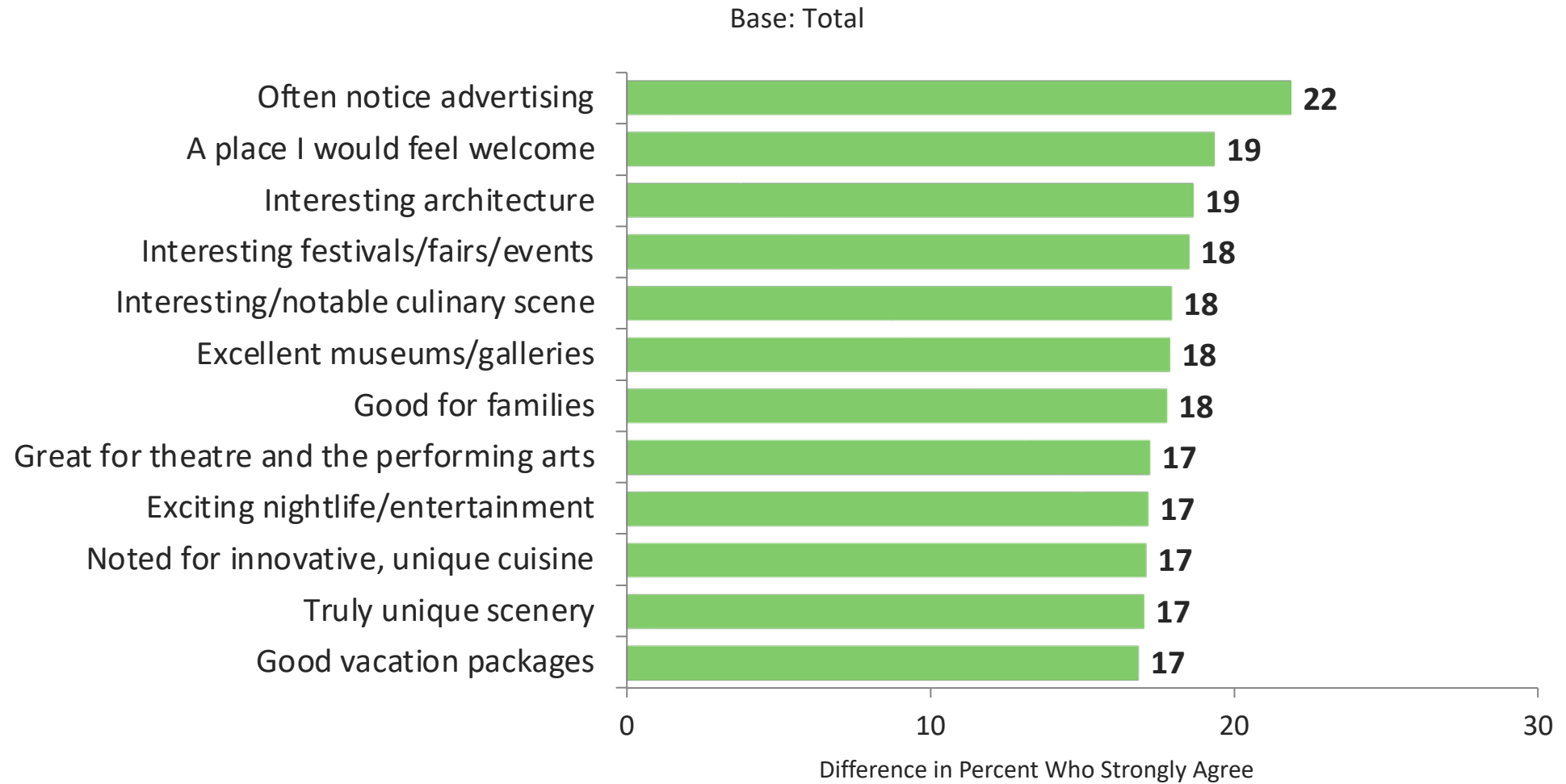




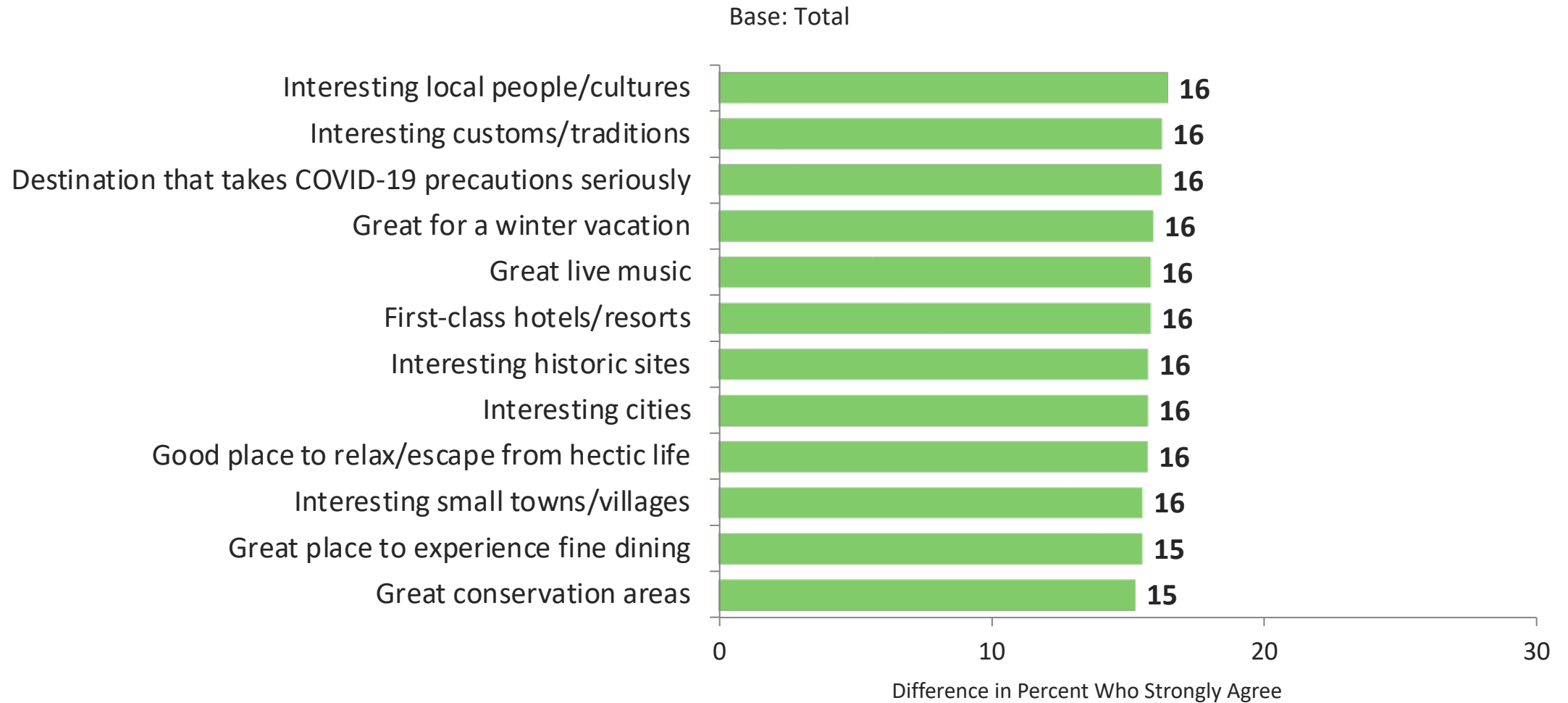
# Hot Buttons Most Impacted by Advertising



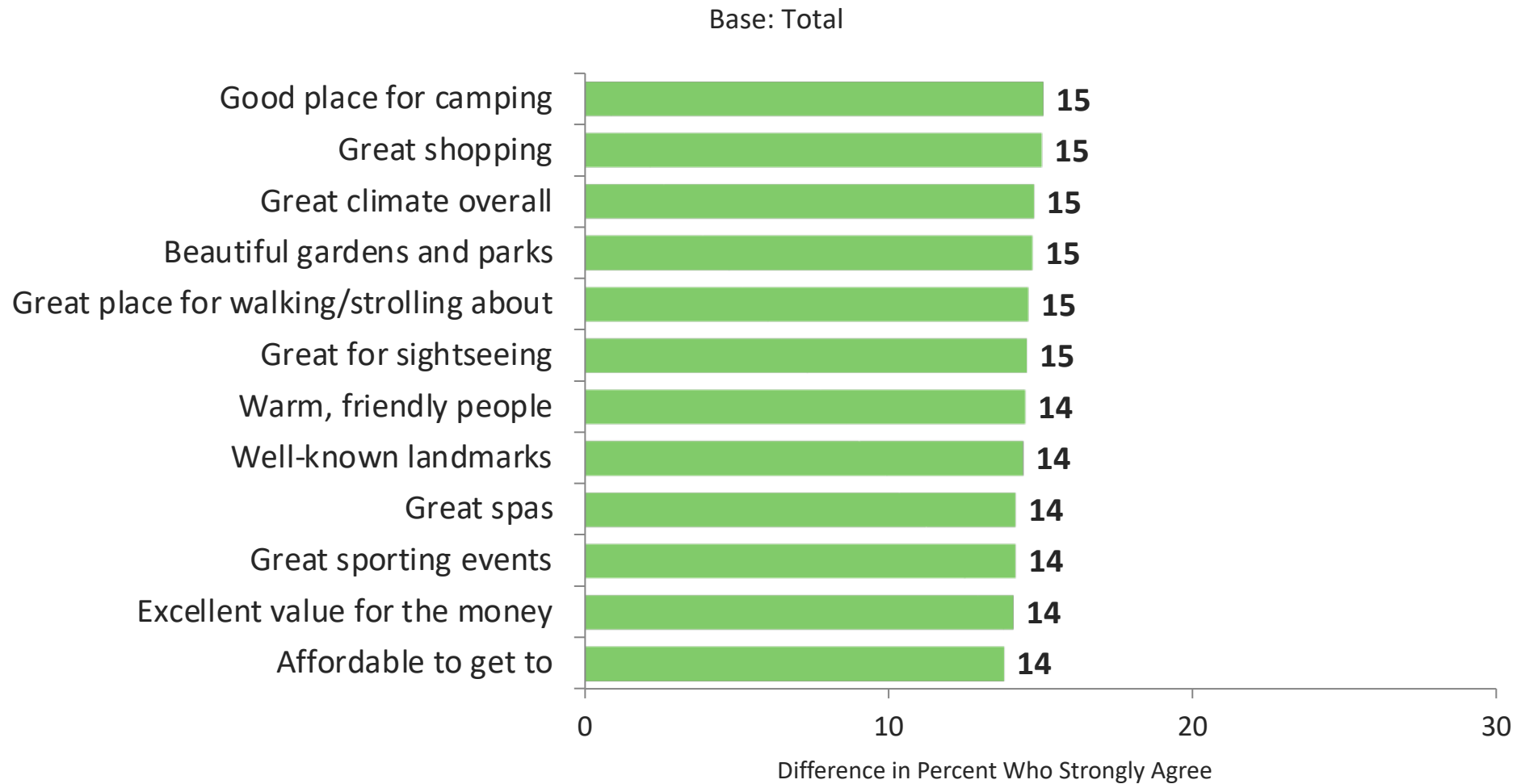
# Image Attributes Most Impacted by Advertising



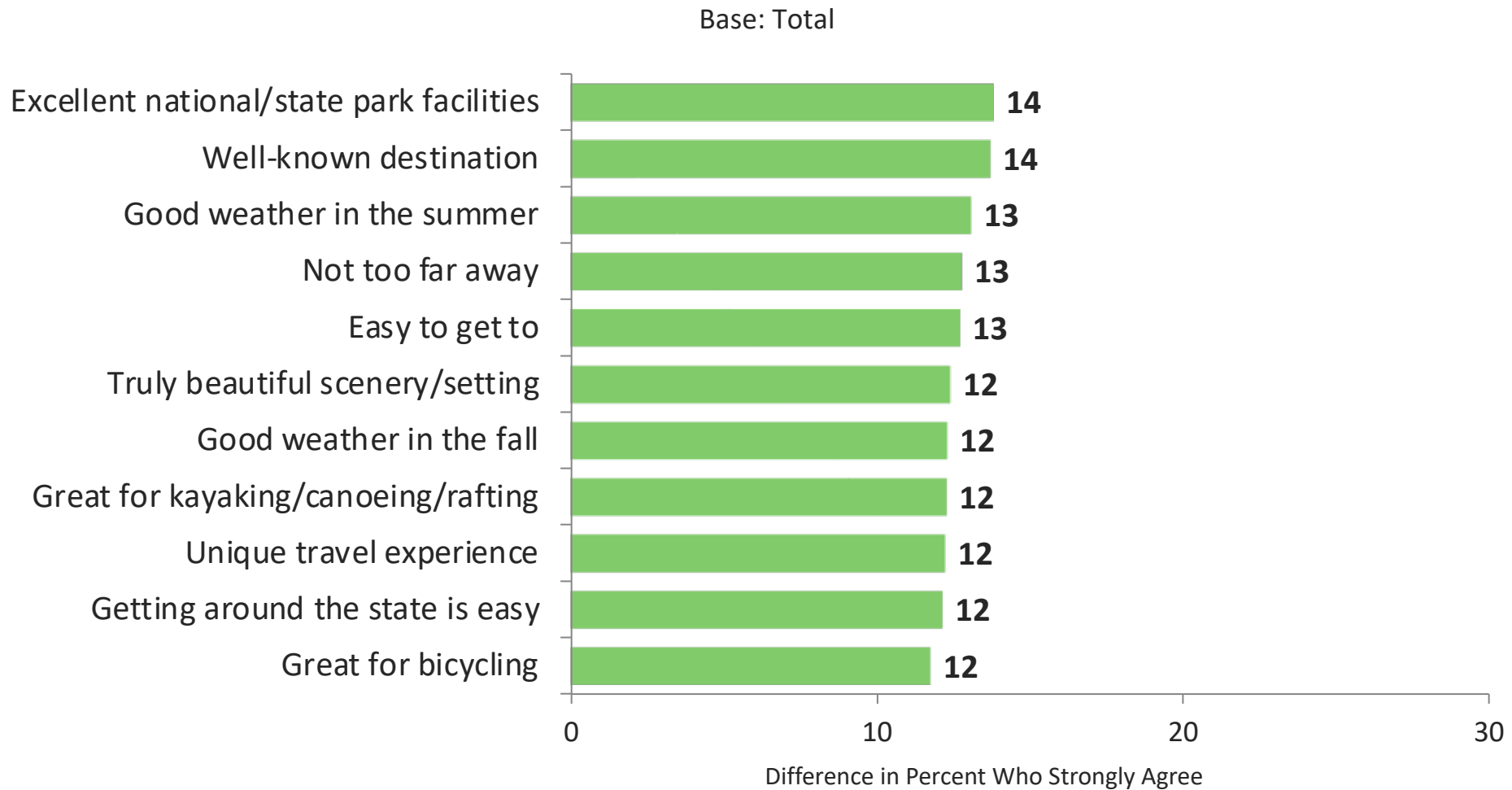
# Image Attributes Most Impacted by Advertising (Cont'd)



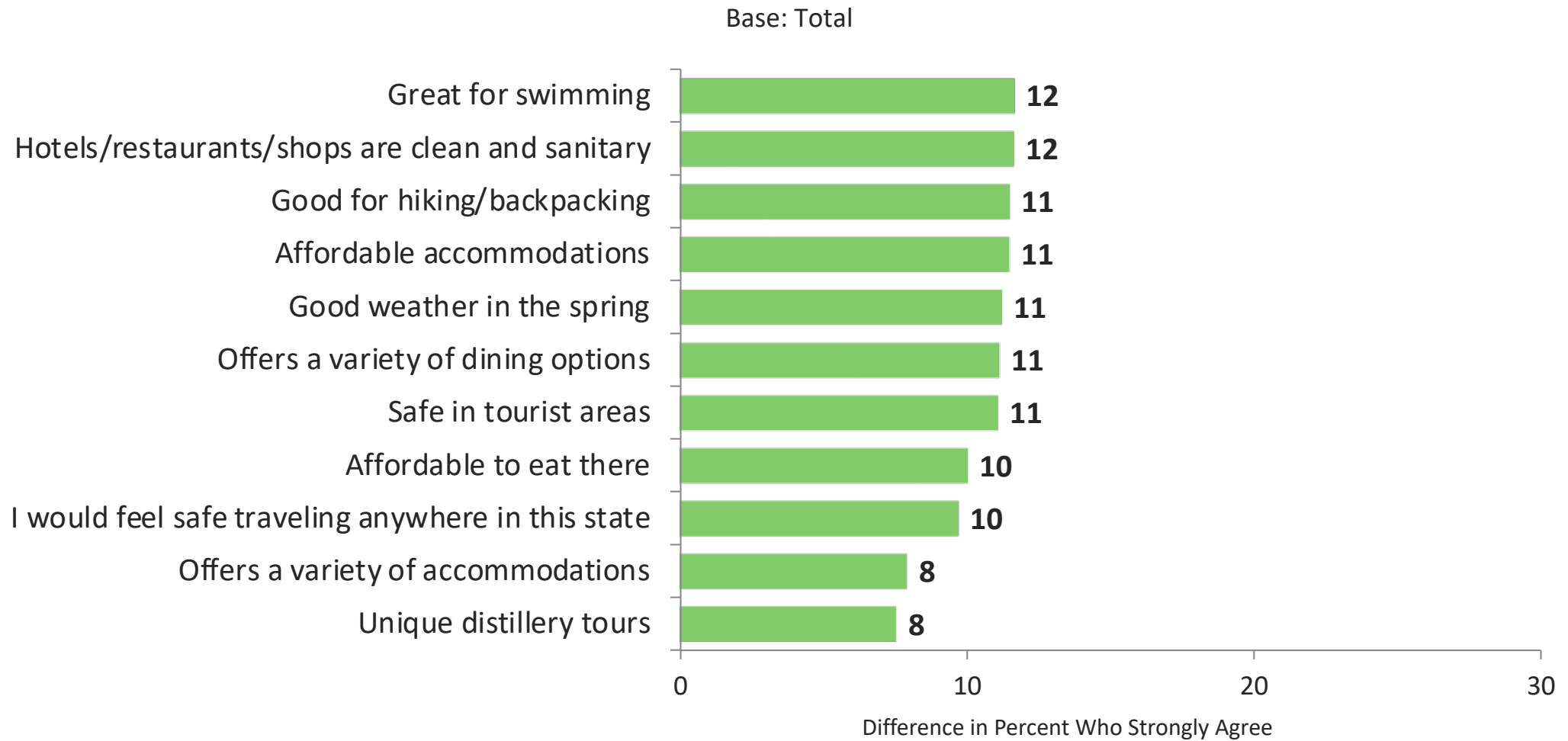
# Image Attributes Most Impacted by Advertising (Cont'd)



# Image Attributes Most Impacted by Advertising (Cont'd)



# Image Attributes Most Impacted by Advertising (Cont'd)







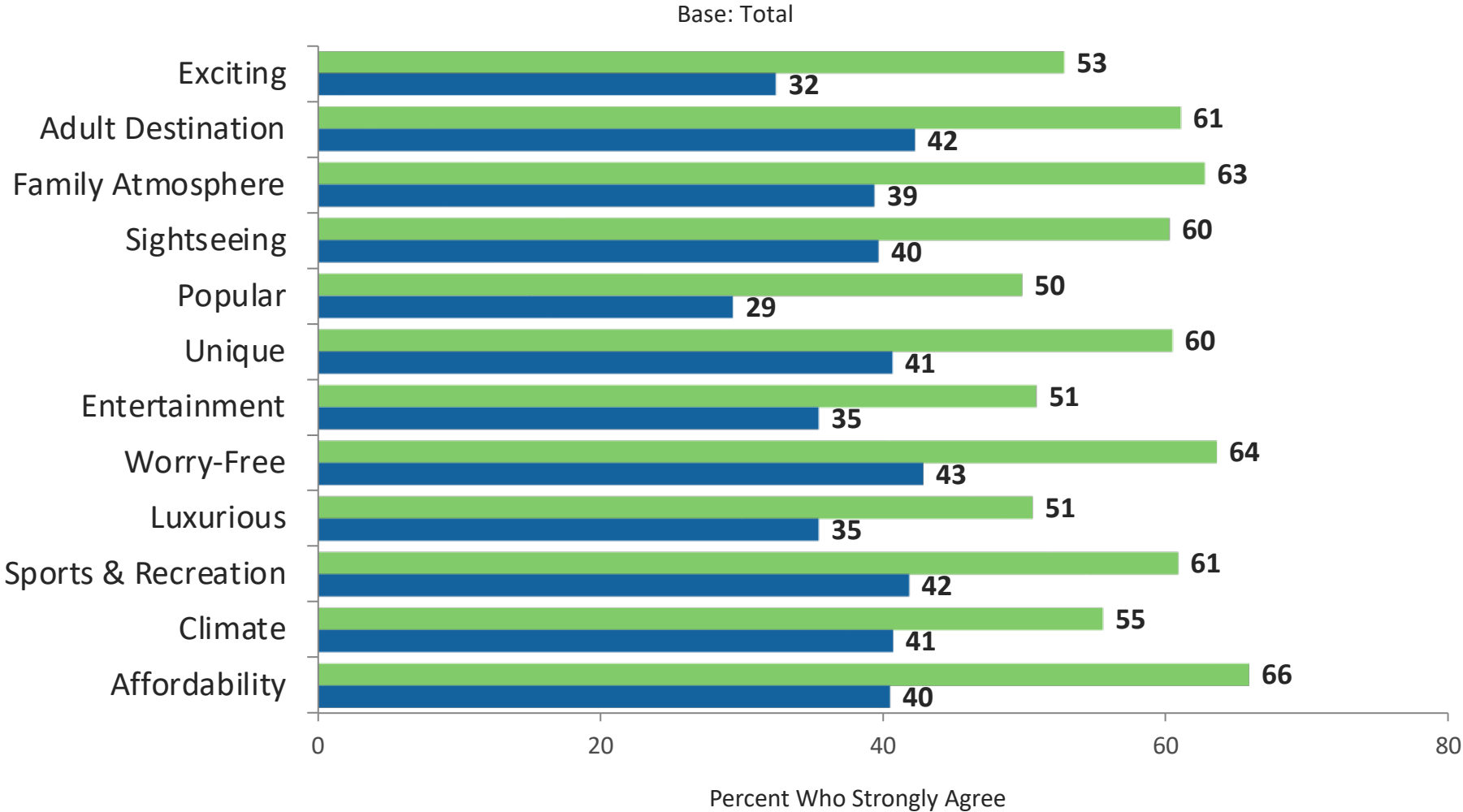
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## Kentucky's Product Delivery

# 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 positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study, with all having a lift of over 15 points. These Hot Buttons experienced a lift of over 20 points:
  - Must see destination
  - Is an interesting place
  - Children would enjoy
  - Lots to see and do
  - A fun place
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

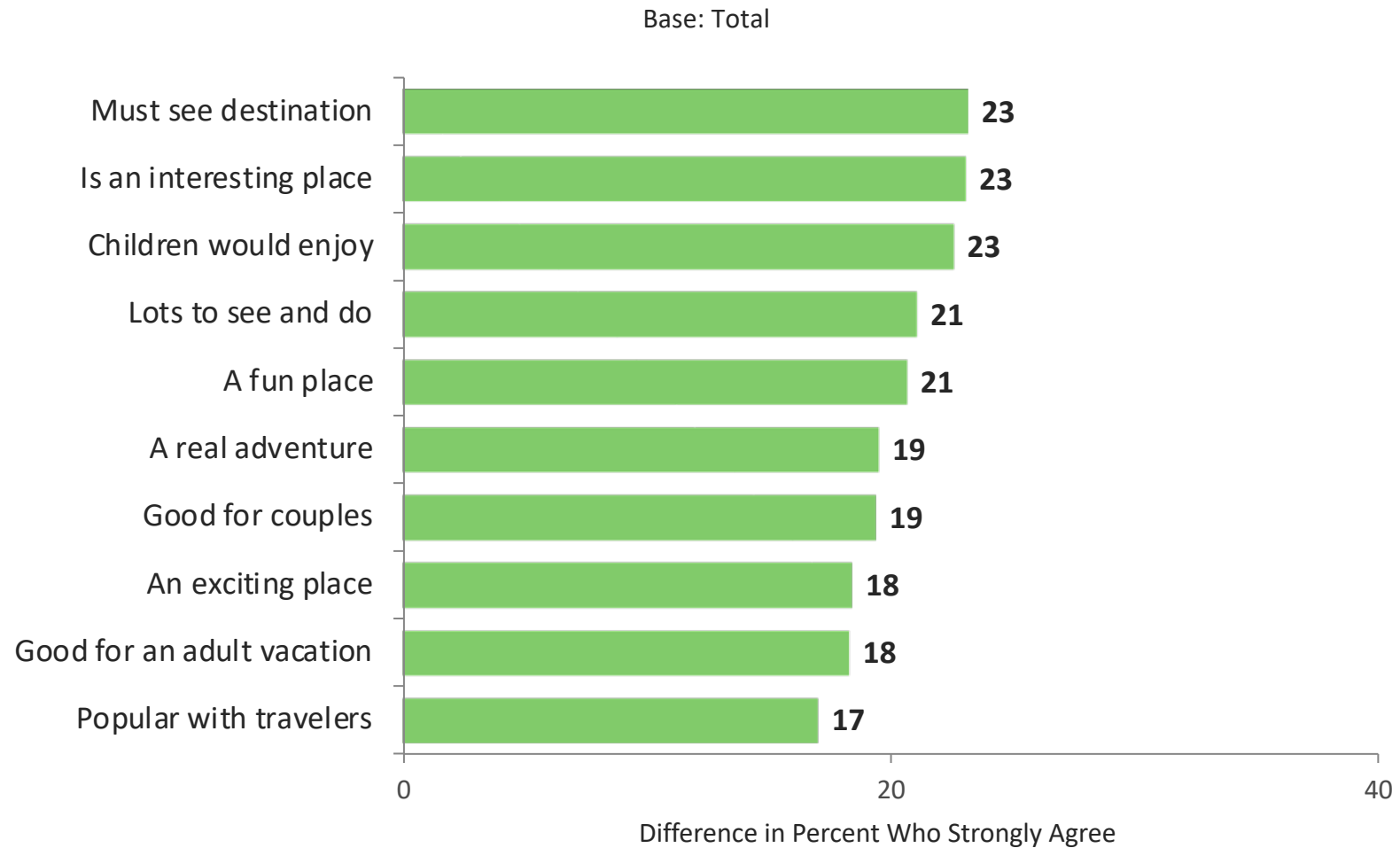
# Kentucky Product vs. Image



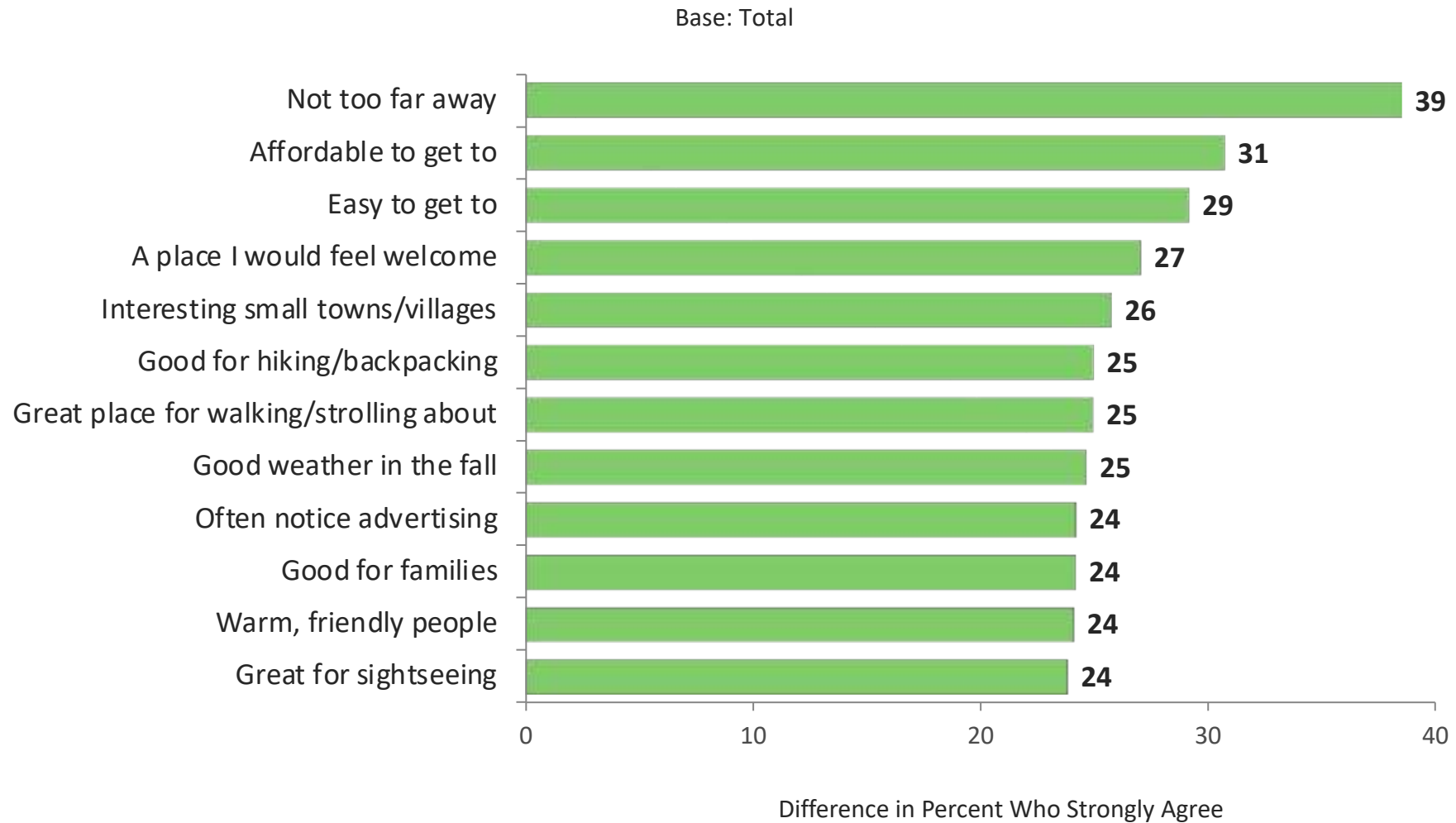
\* Visited in the past 2 years

Recent Visitors\*      Never Visited

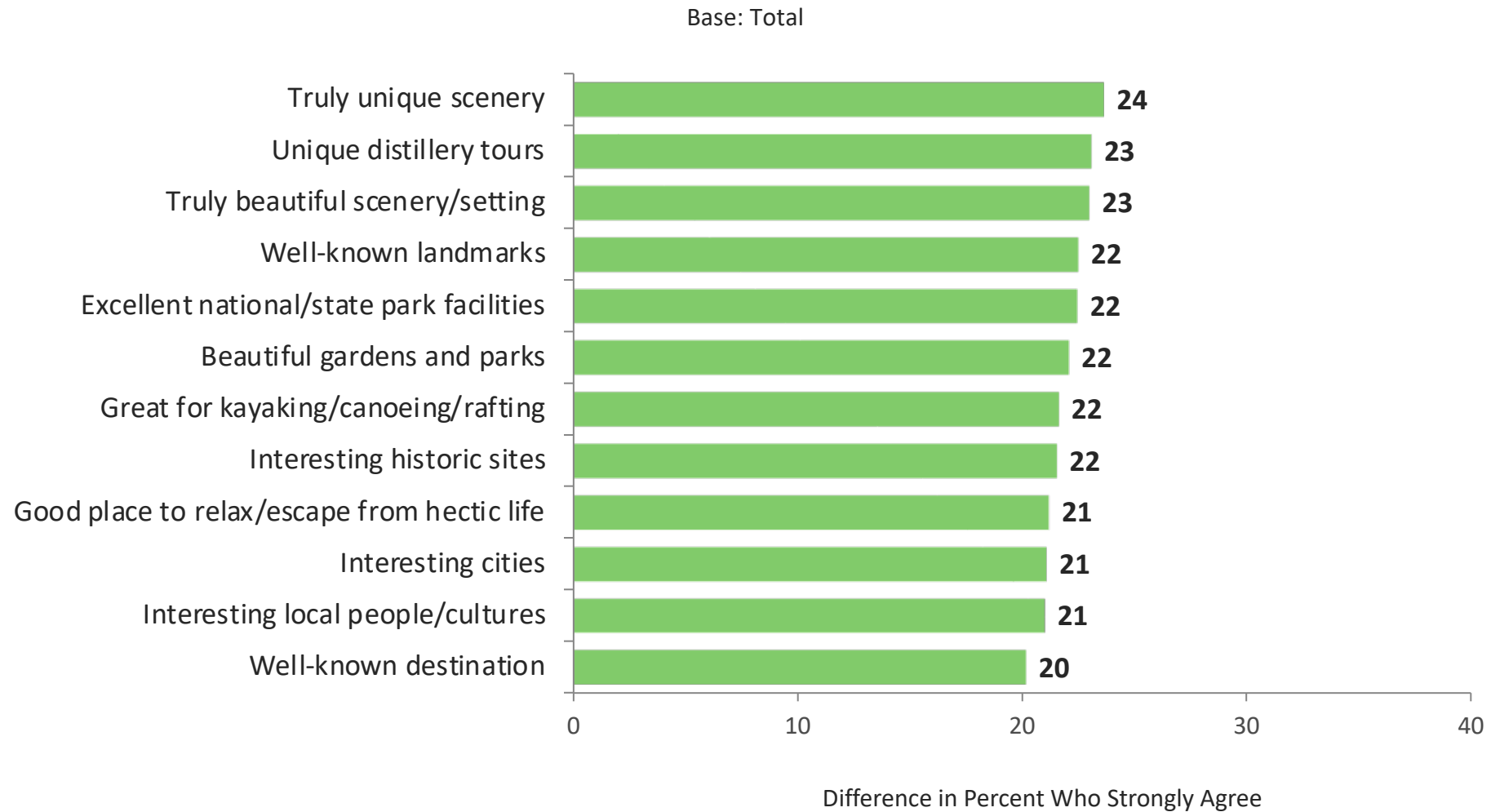
# Top Product Strengths vs. Image – Hot Buttons



# Top Product Strengths vs. Image

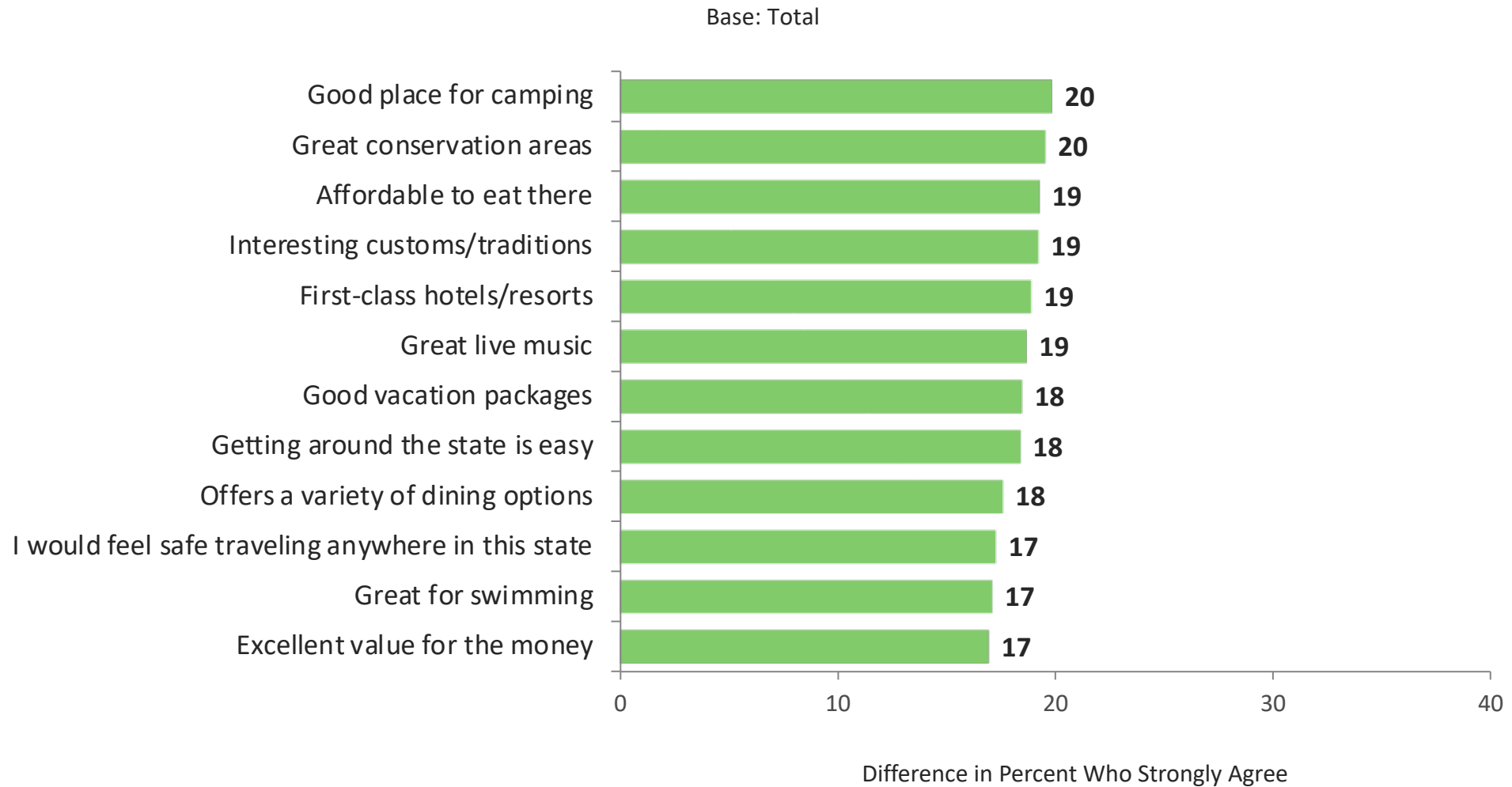


# Top Product Strengths vs. Image (Cont'd)

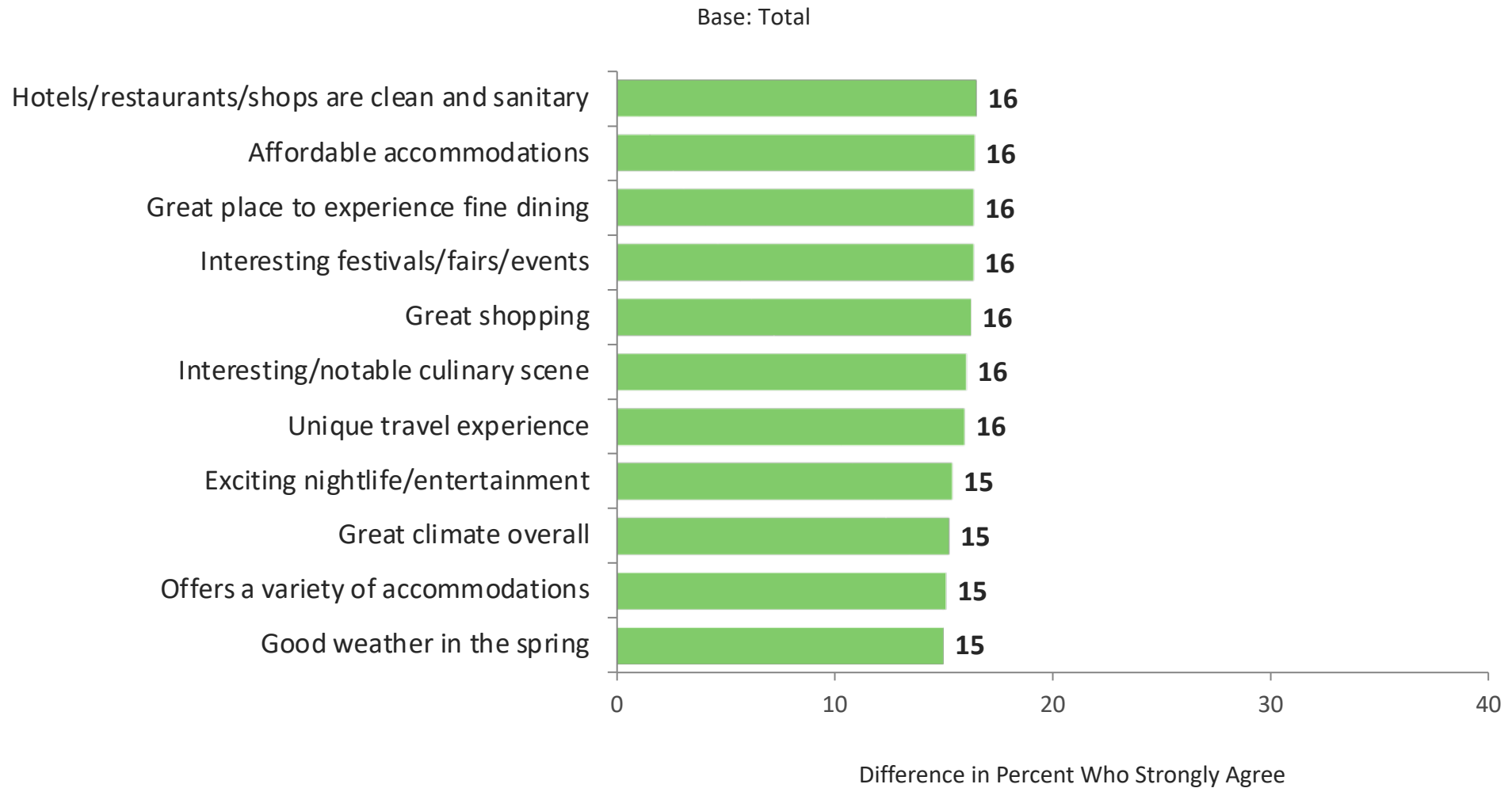




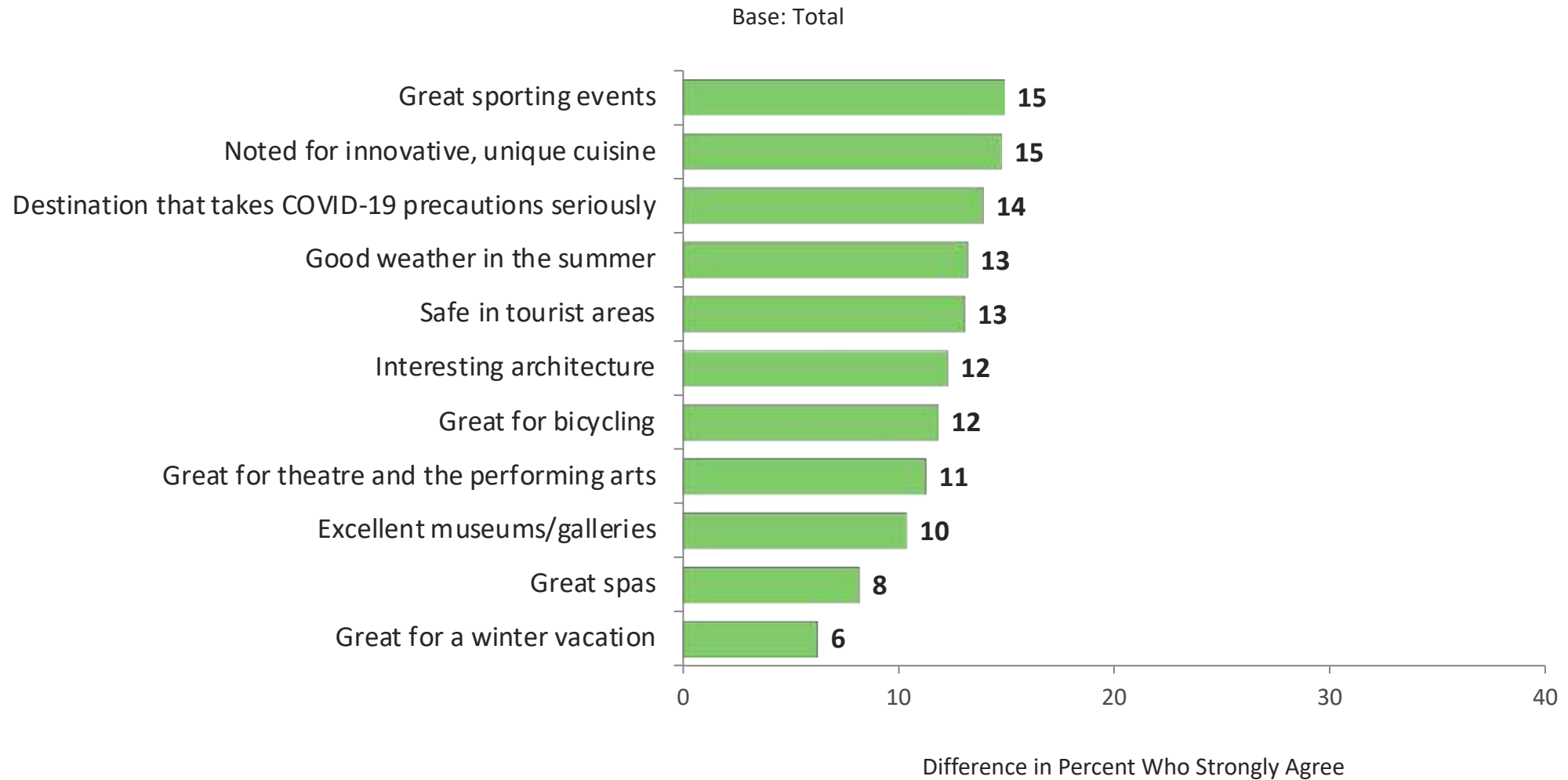
# Top Product Strengths vs. Image (Cont'd)



# Top Product Strengths vs. Image (Cont'd)



# Top Product Strengths vs. Image (Cont'd)



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



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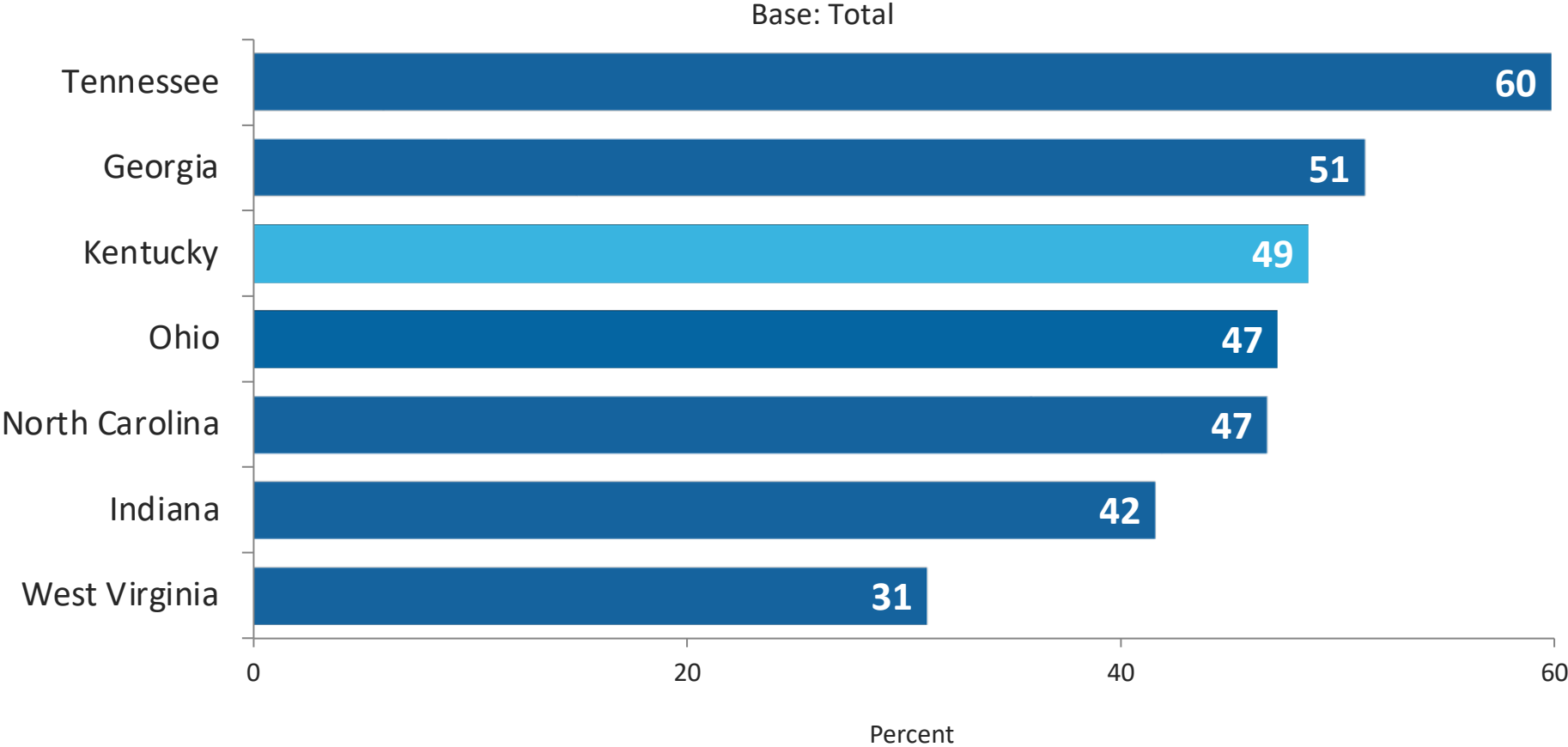
Destination  
Visitation  
& Interest

# Destination Visitation & Intent

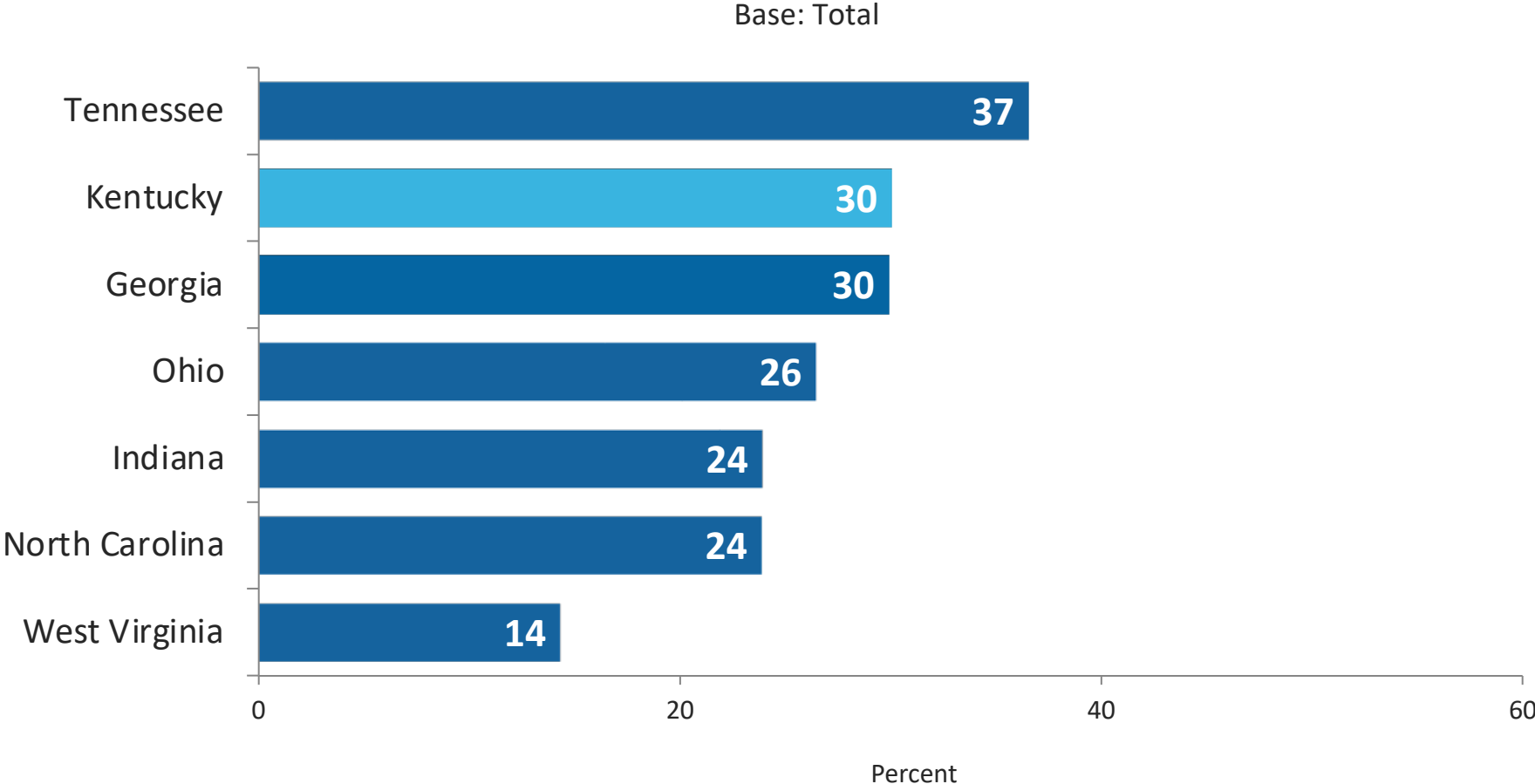
- Half (49%) of travelers within the total advertising markets have visited Kentucky during their lifetimes. Kentucky is tied with Georgia (51%) and behind Tennessee (60%).
- Three in ten (30%) travelers within the total advertising markets have visited Kentucky during the past 2 years. Kentucky is tied with Georgia (30%) and behind Tennessee (37%).
- Four in ten (42%) travelers within the total advertising markets intend to visit Kentucky during the next 12 months. Kentucky is tied with Georgia (41%) and behind Tennessee (55%) and North Carolina (45%).
- Among travelers who visited Kentucky overnight, the most popular activities were shopping (50%), trying unique/local foods (38%), outdoor activities (37%), visiting a national/state park (35%), and visiting a landmark/historical site (33%).



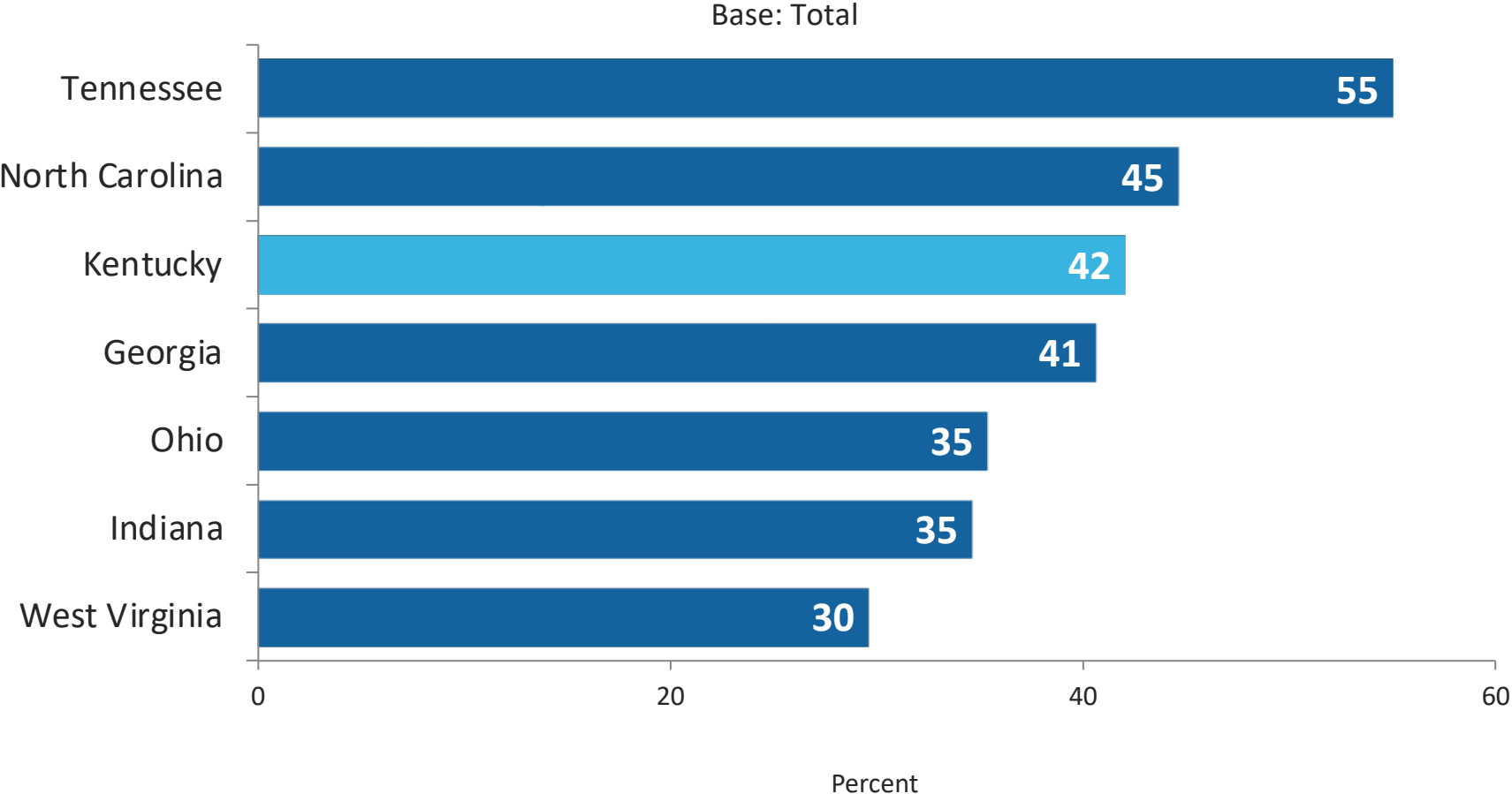
# Destinations Ever Visited



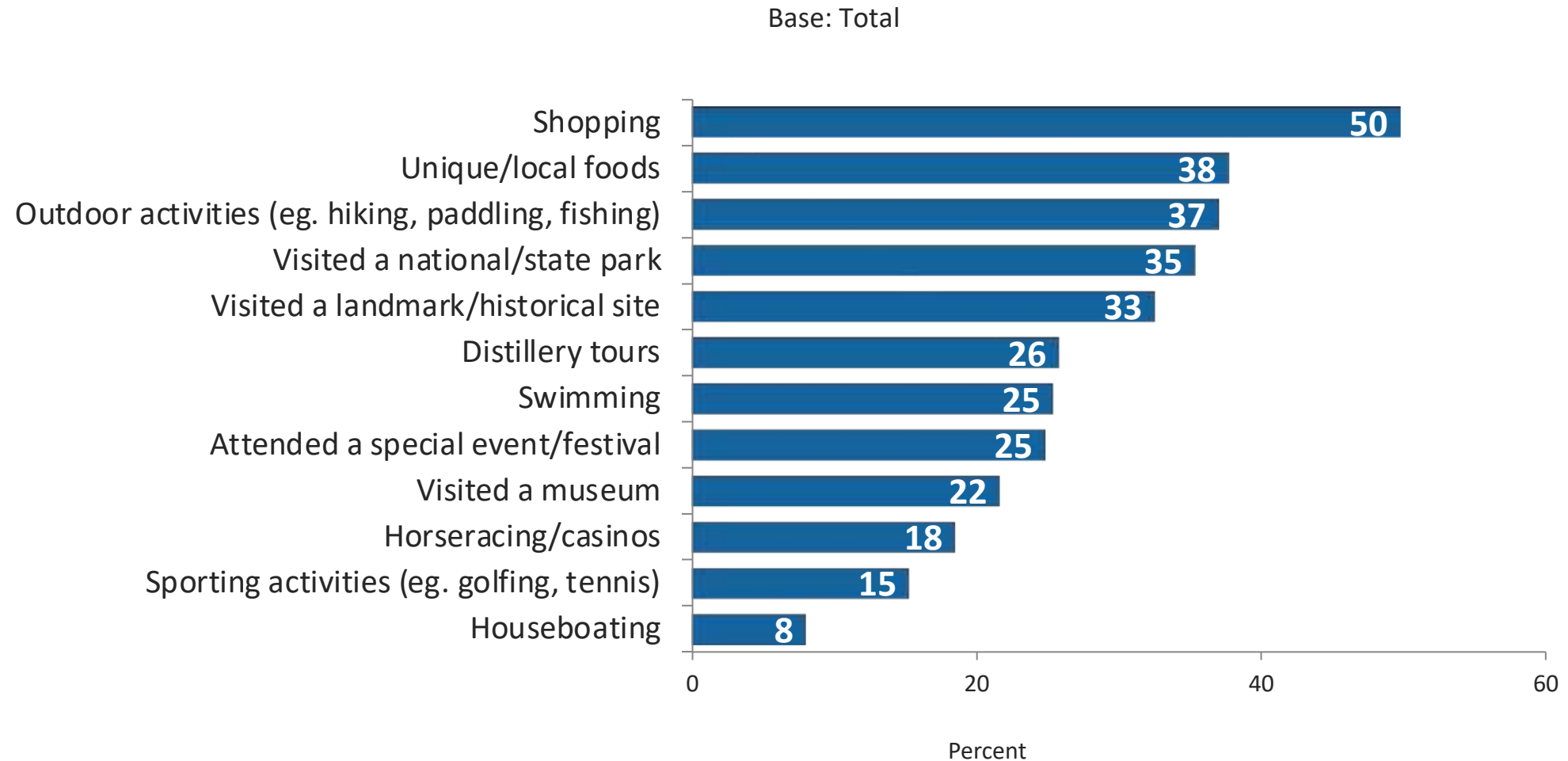
# Destinations Visited in Past 2 Years



# Destinations Intend to Visit in Next 12 Months



# Activities Participated on Overnight Trip to Kentucky





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## Kentucky's Image vs. Competition

# Kentucky's Image

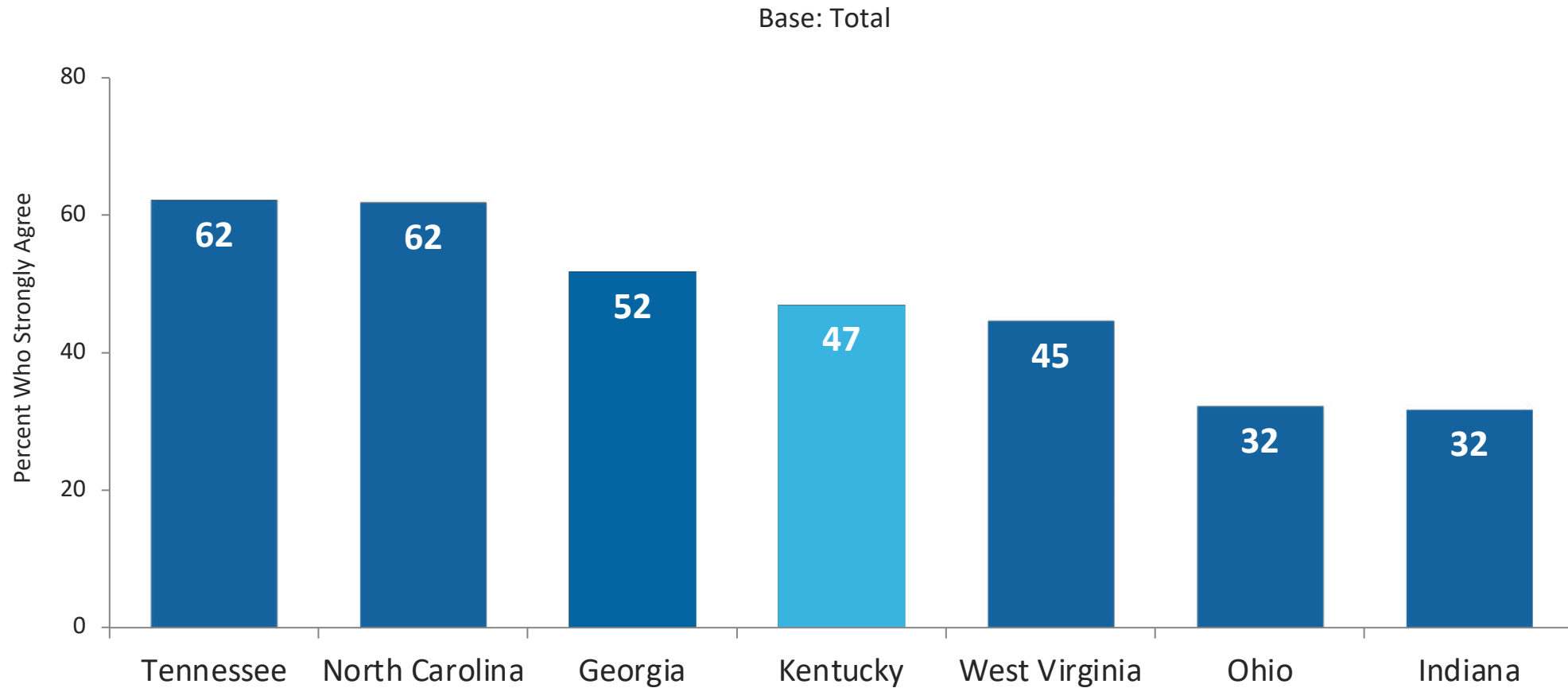
- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their total advertising markets:
  - Across the markets surveyed, almost half (47%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
    - Tied with West Virginia.
    - Ahead of Ohio and Indiana.
    - Behind Tennessee, North Carolina, 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.
  - Tied with West Virginia.
  - Georgia, North Carolina, Indiana, and Ohio trail.
- When comparing Kentucky's image versus the image of the combined competition, Kentucky's four image strengths are:
  - Unique distillery tours
  - Good for hiking/backpacking
  - Interesting small towns/villages
  - Affordable accommodations



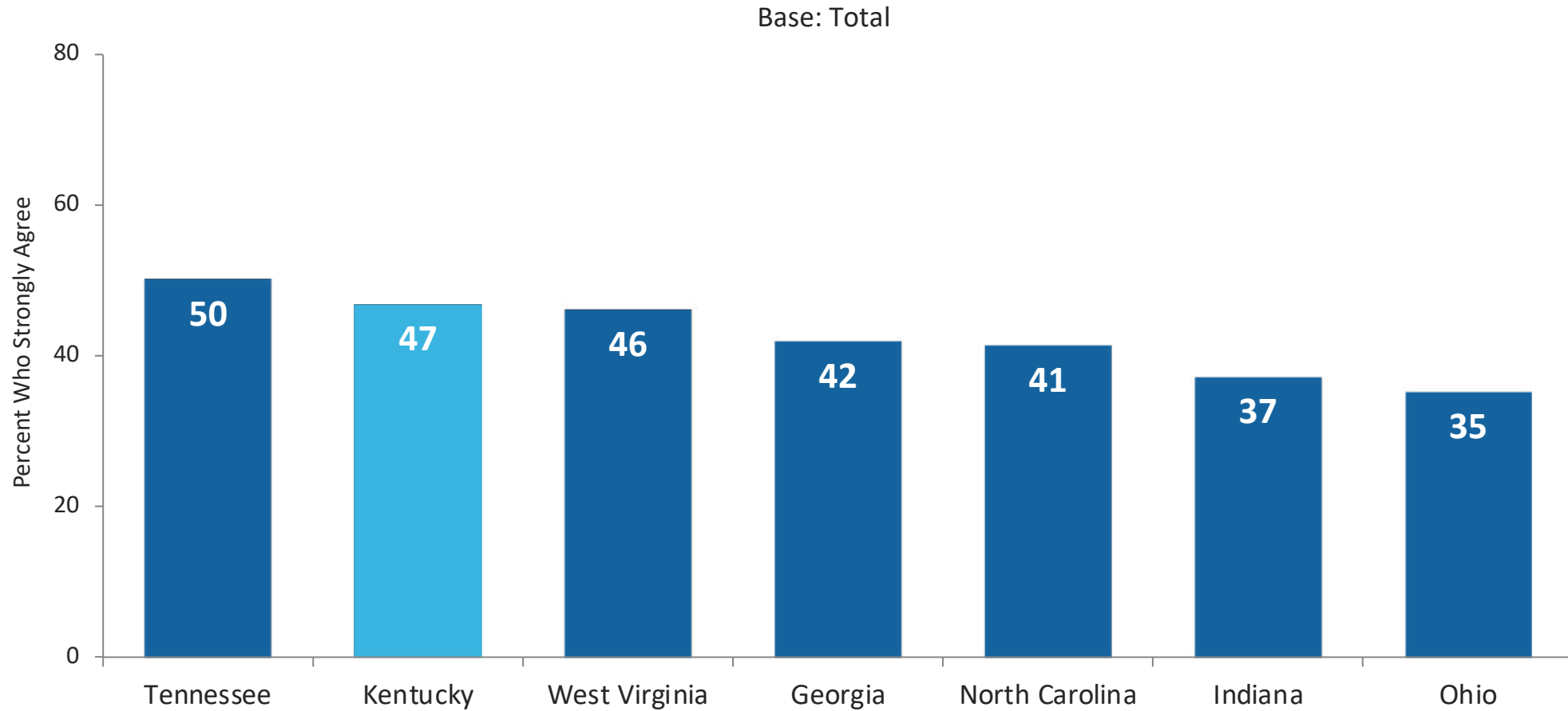
# Kentucky's Image (Cont'd)

- The six weaknesses Kentucky had in comparison to the combined competitive set are:
  - Exciting nightlife/entertainment
  - Great for theatre and the performing arts
  - First-class hotels/resorts
  - Great place to experience fine dining
  - Great shopping
  - Popular with travelers (this is a Hot Button)

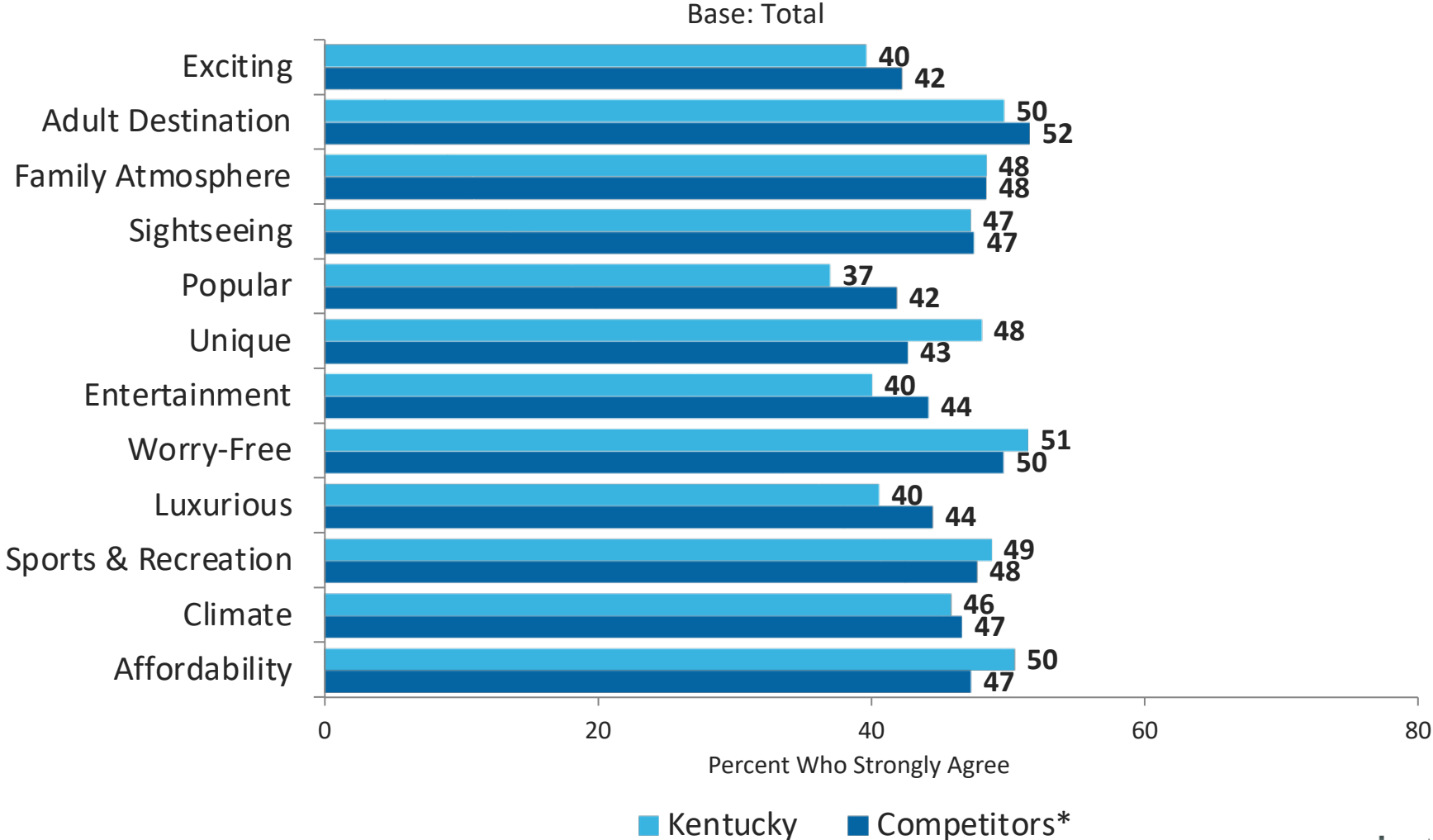
# Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”



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

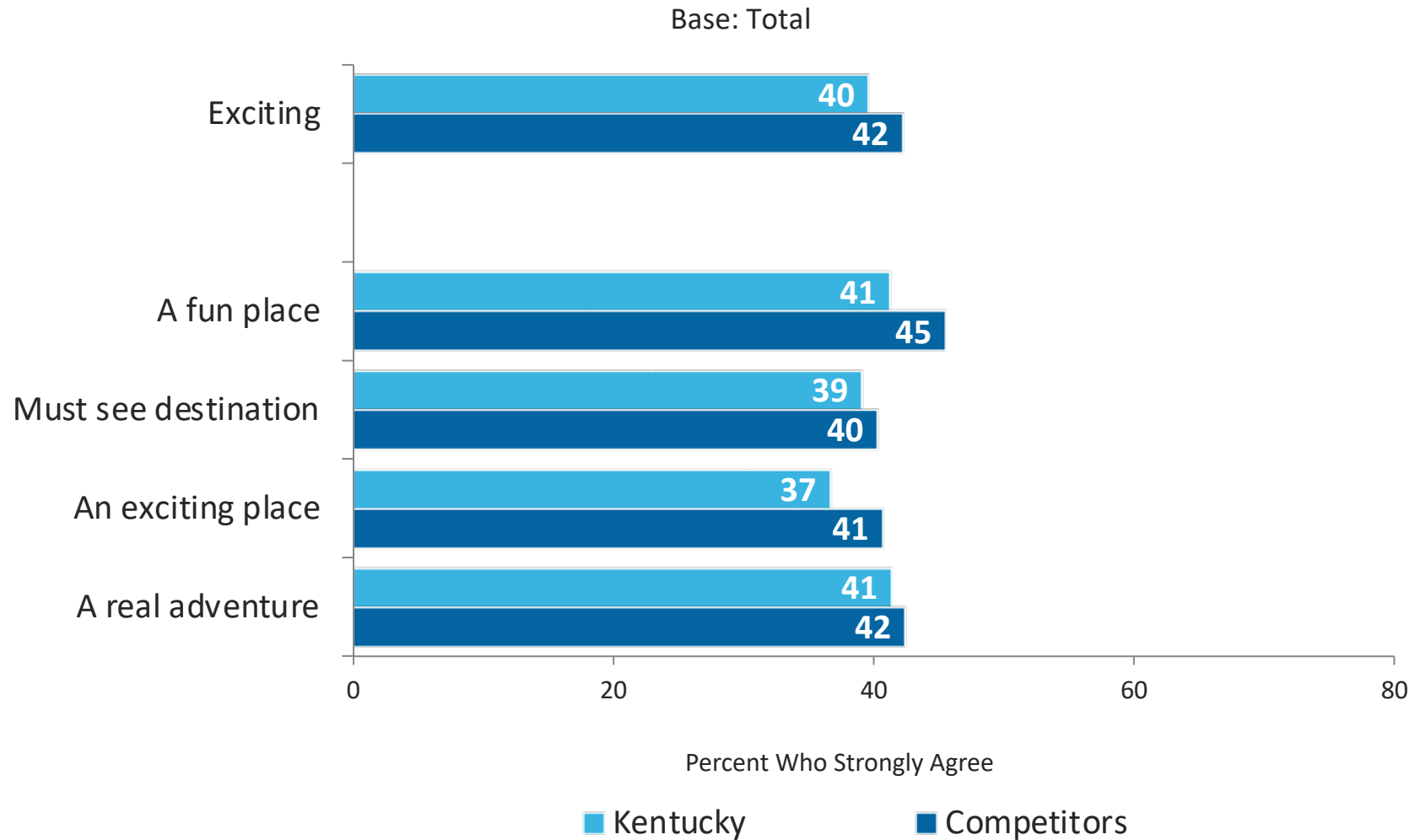


# Kentucky's Overall Image vs. Competition

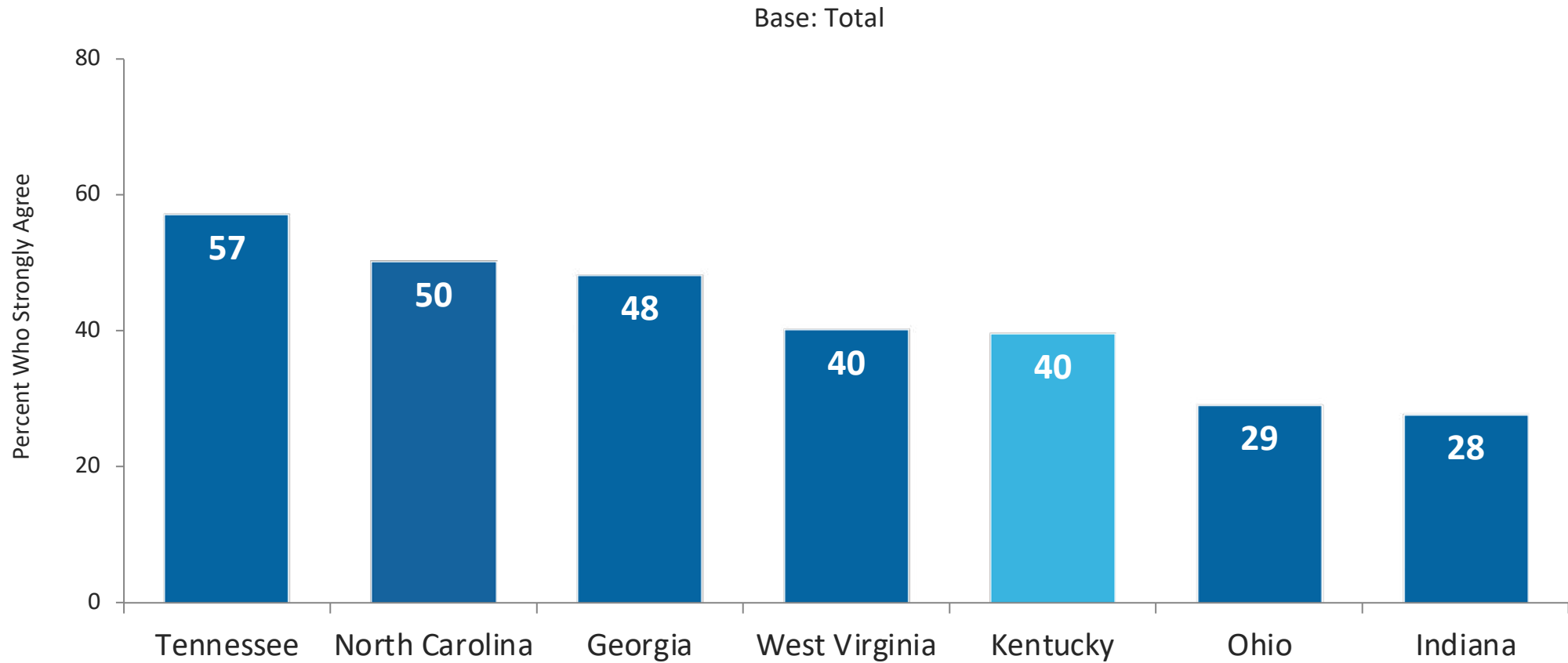


\* Includes Tennessee, North Carolina, Georgia, Indiana, Ohio, West Virginia

# Kentucky's Image vs. Competition — Exciting

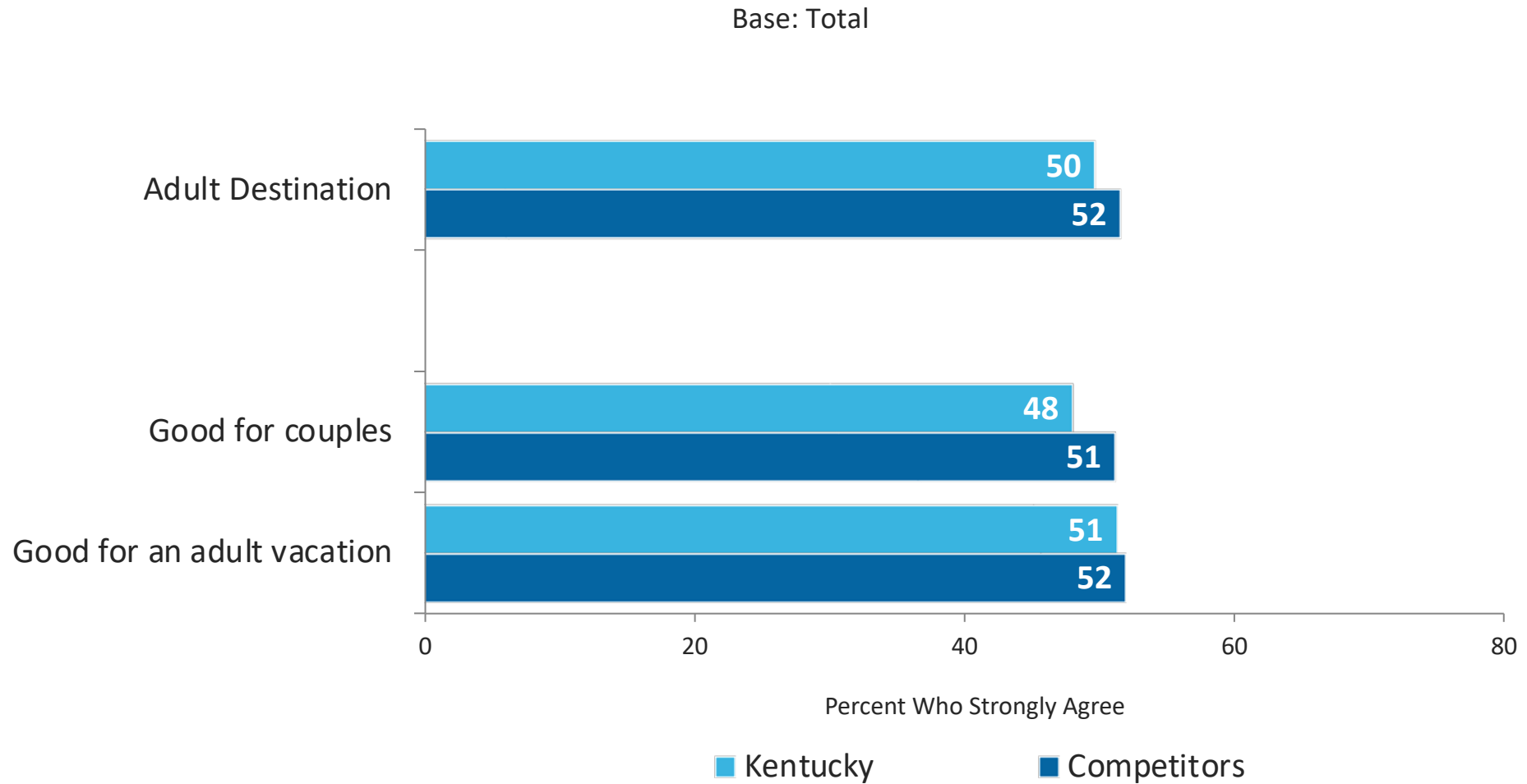


# Kentucky's Image vs. Competition — Exciting

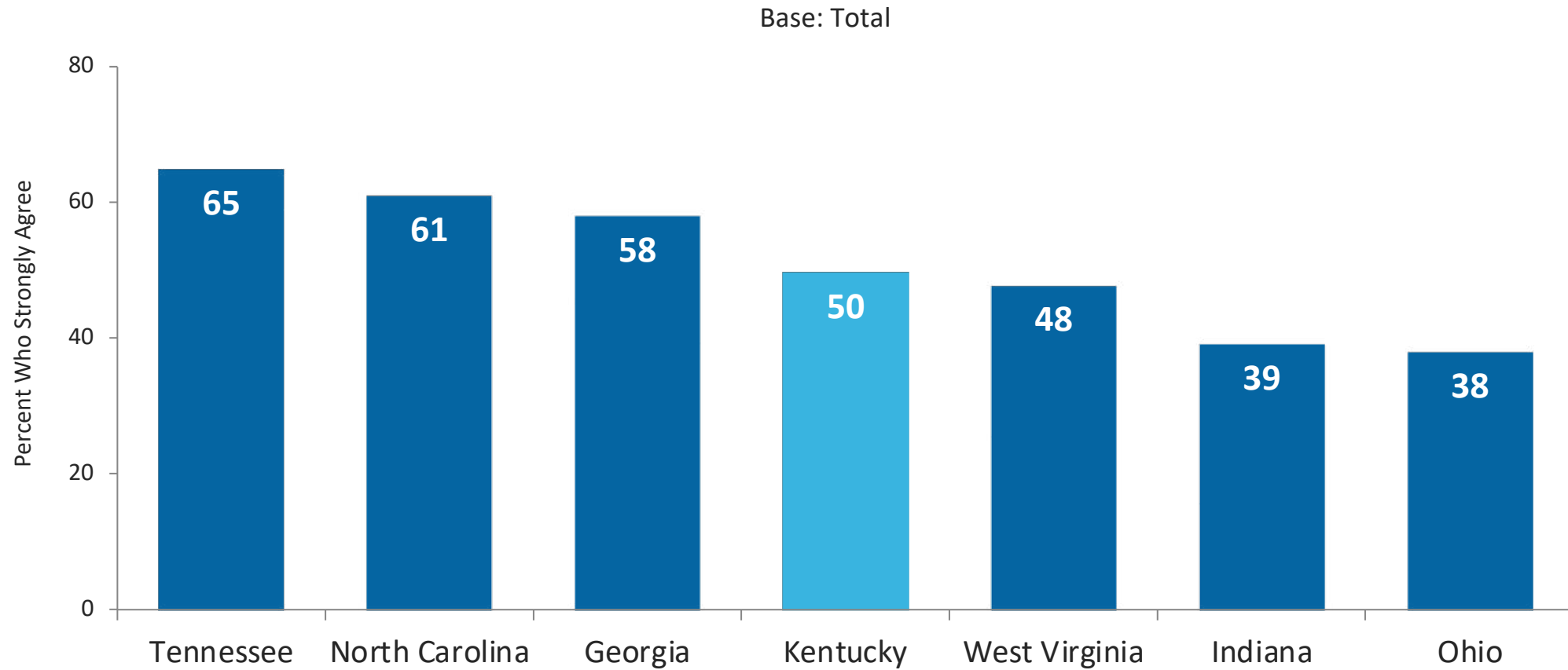




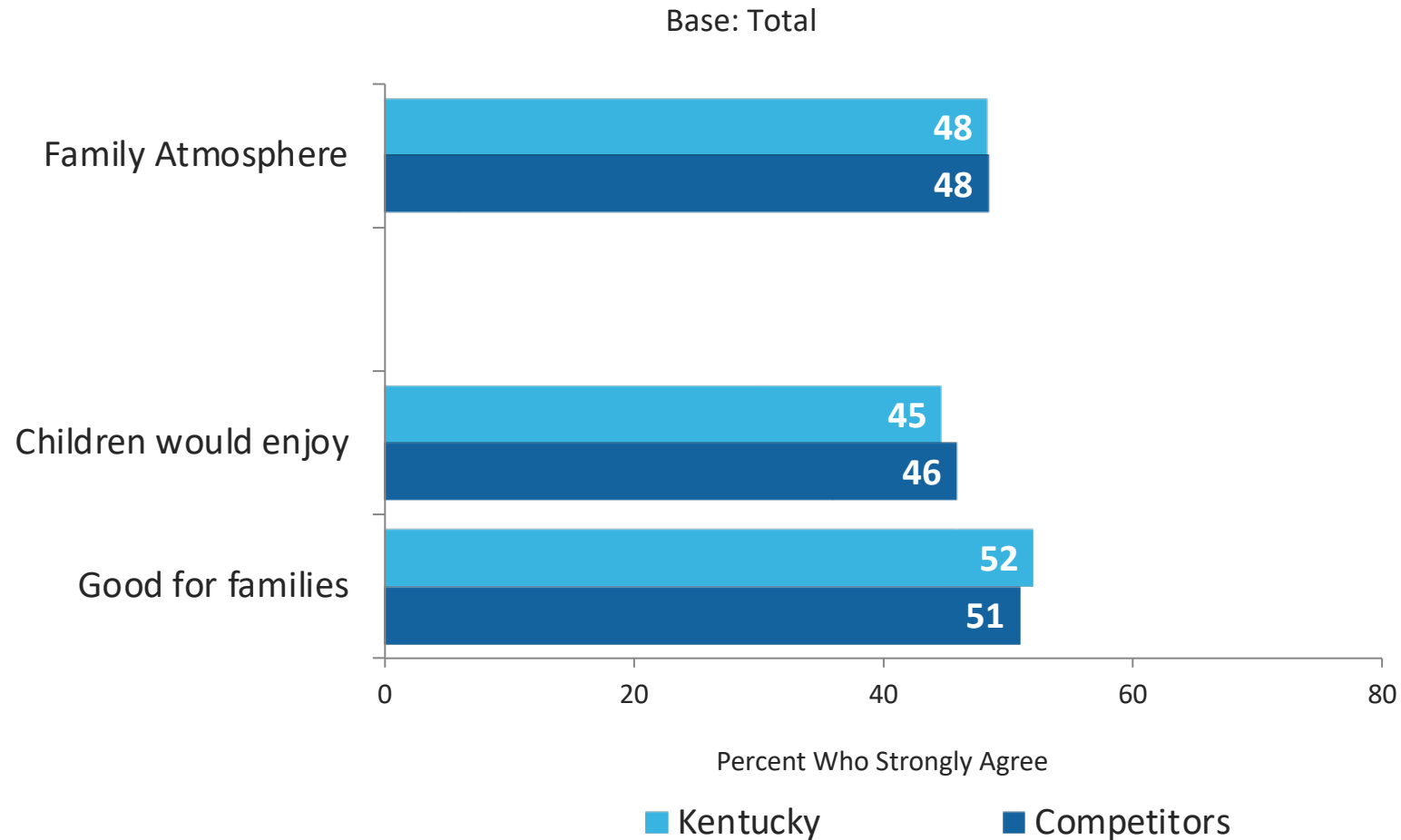
# Kentucky's Image vs. Competition — Adult Destination



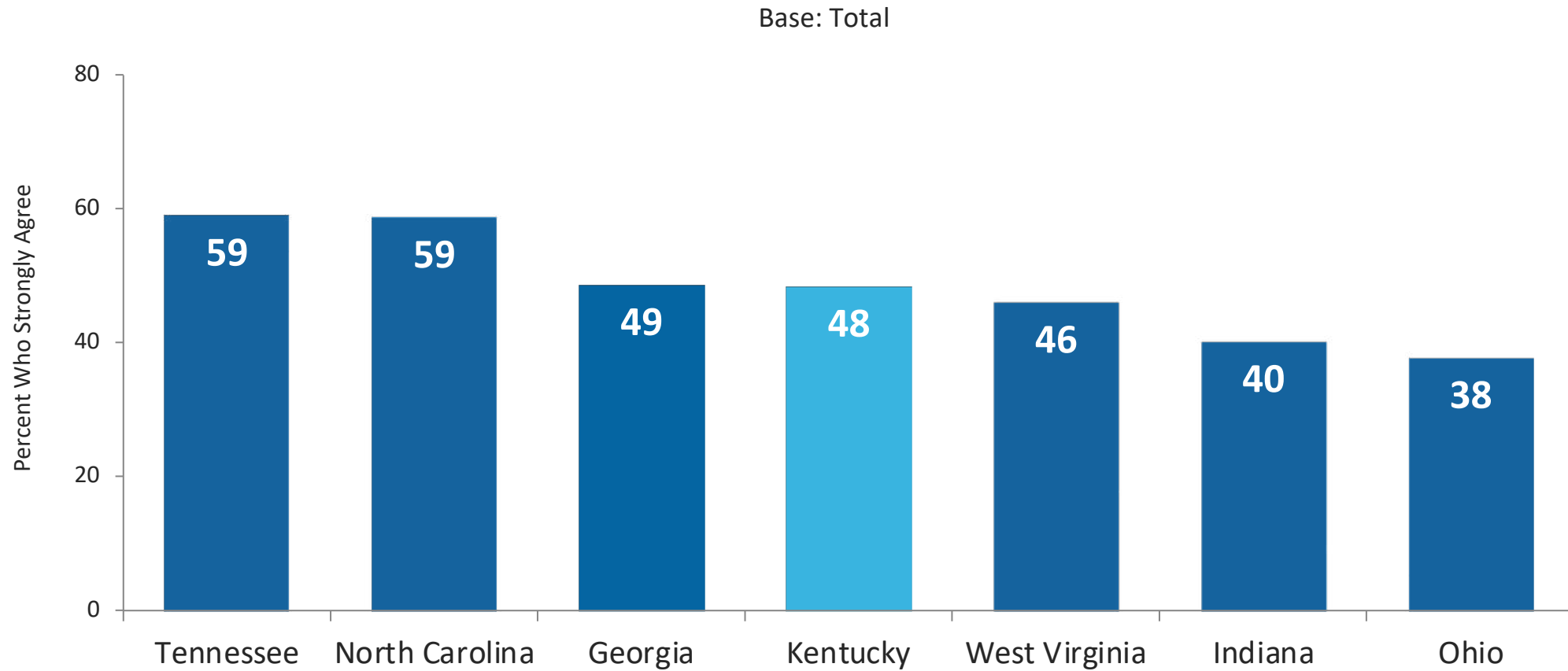
# Kentucky's Image vs. Competition — Adult Destination



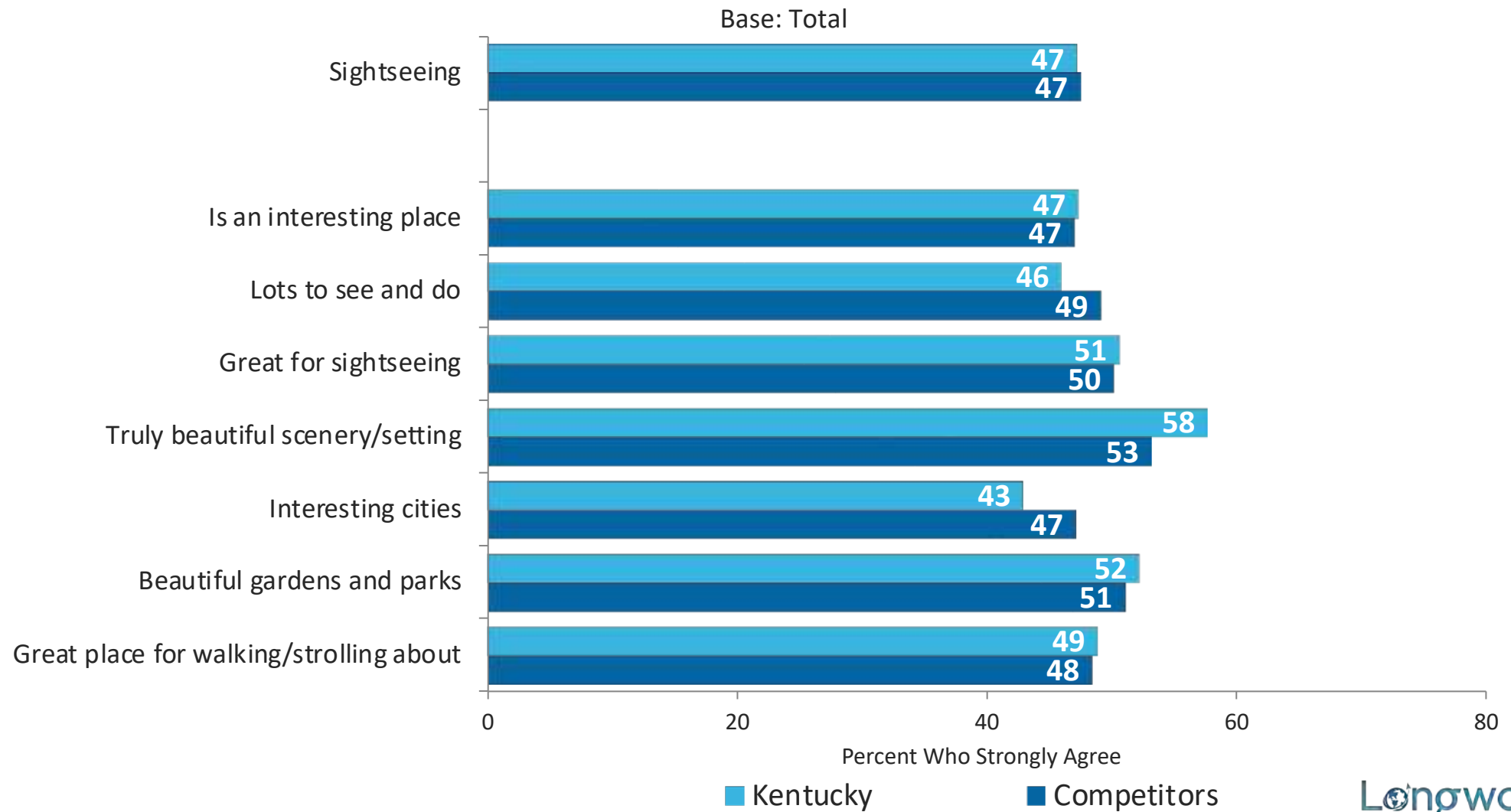
# Kentucky's Image vs. Competition — Family Atmosphere



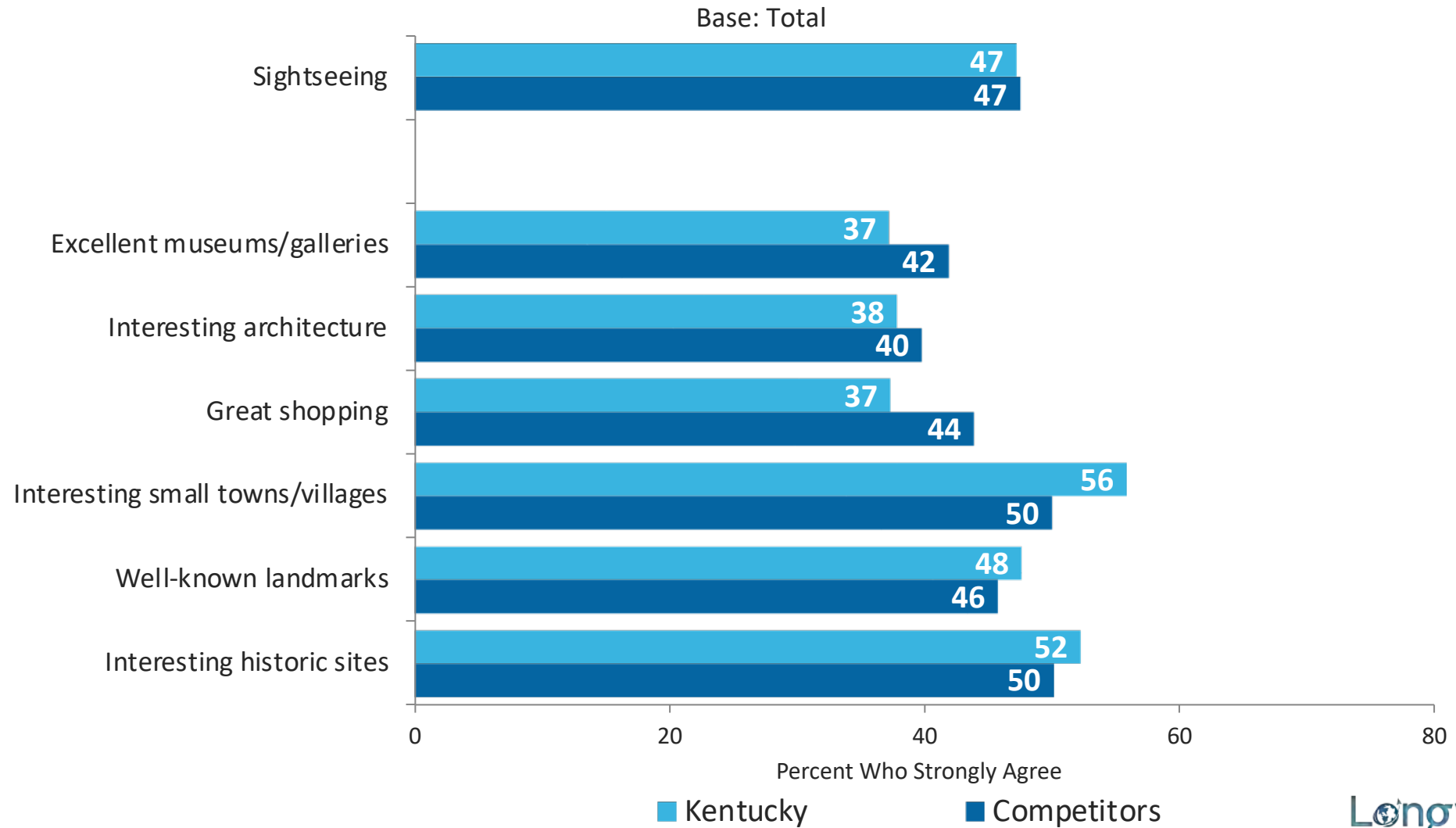
# Kentucky's Image vs. Competition — Family Atmosphere



# Kentucky's Image vs. Competition — Sightseeing

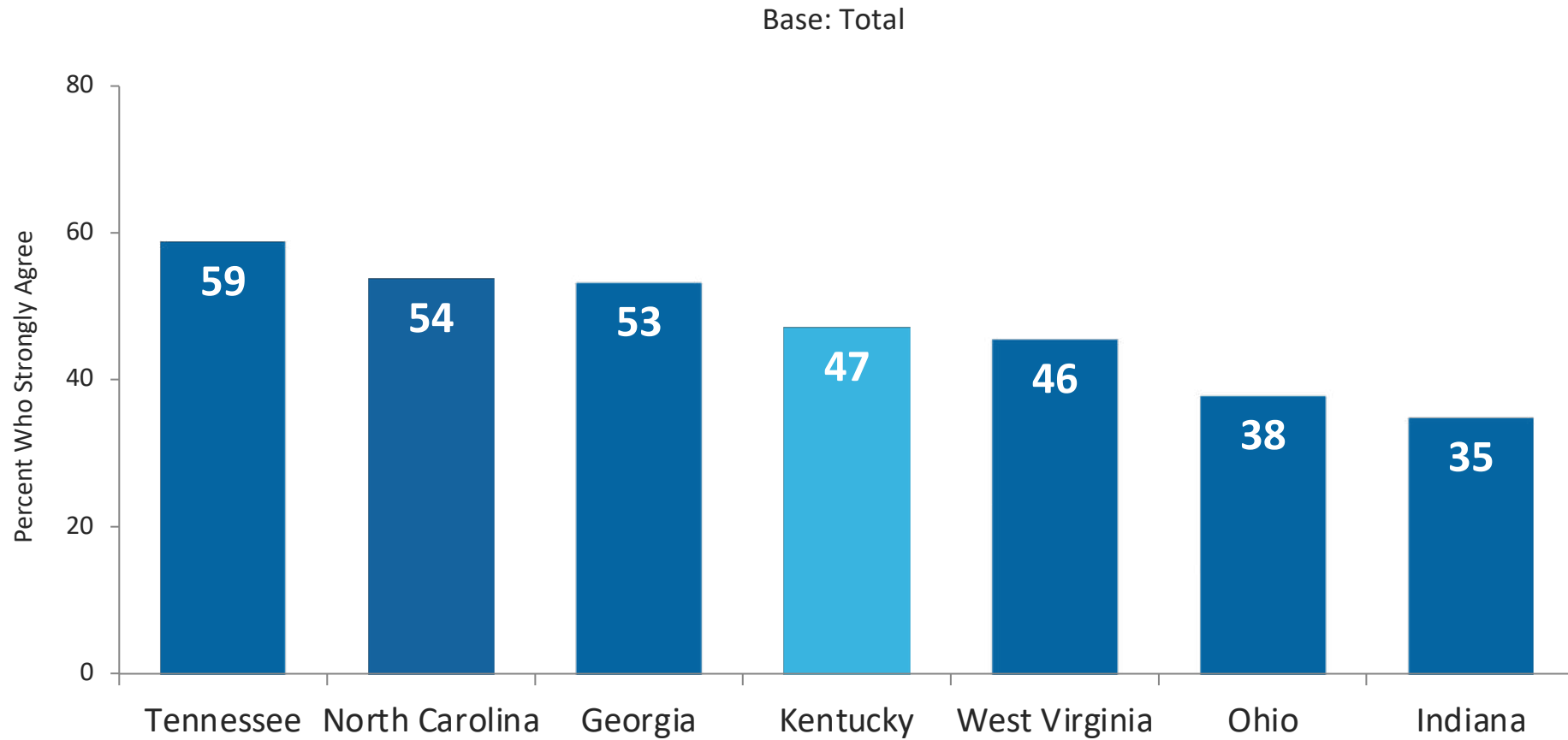


# Kentucky's Image vs. Competition — Sightseeing

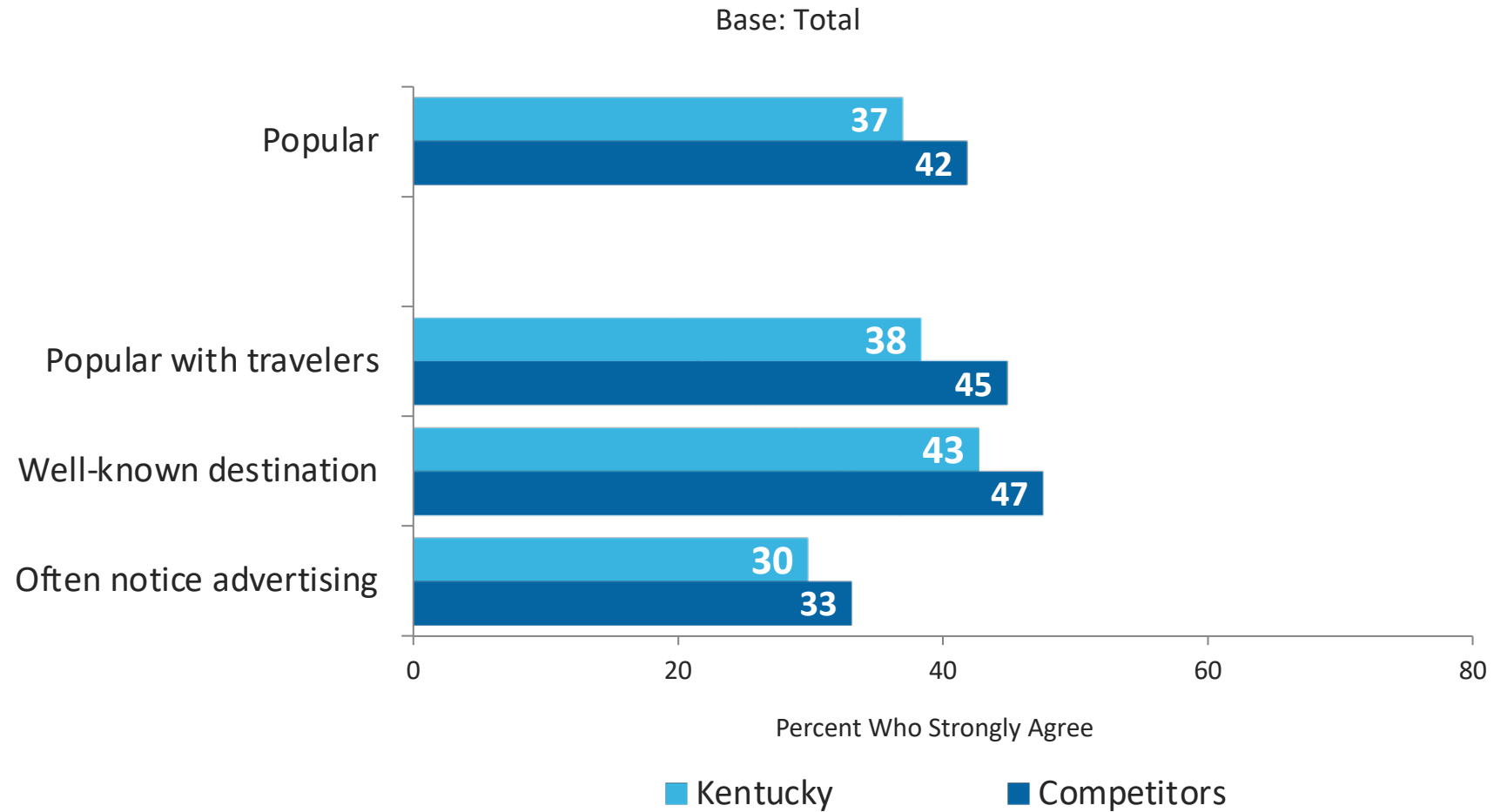




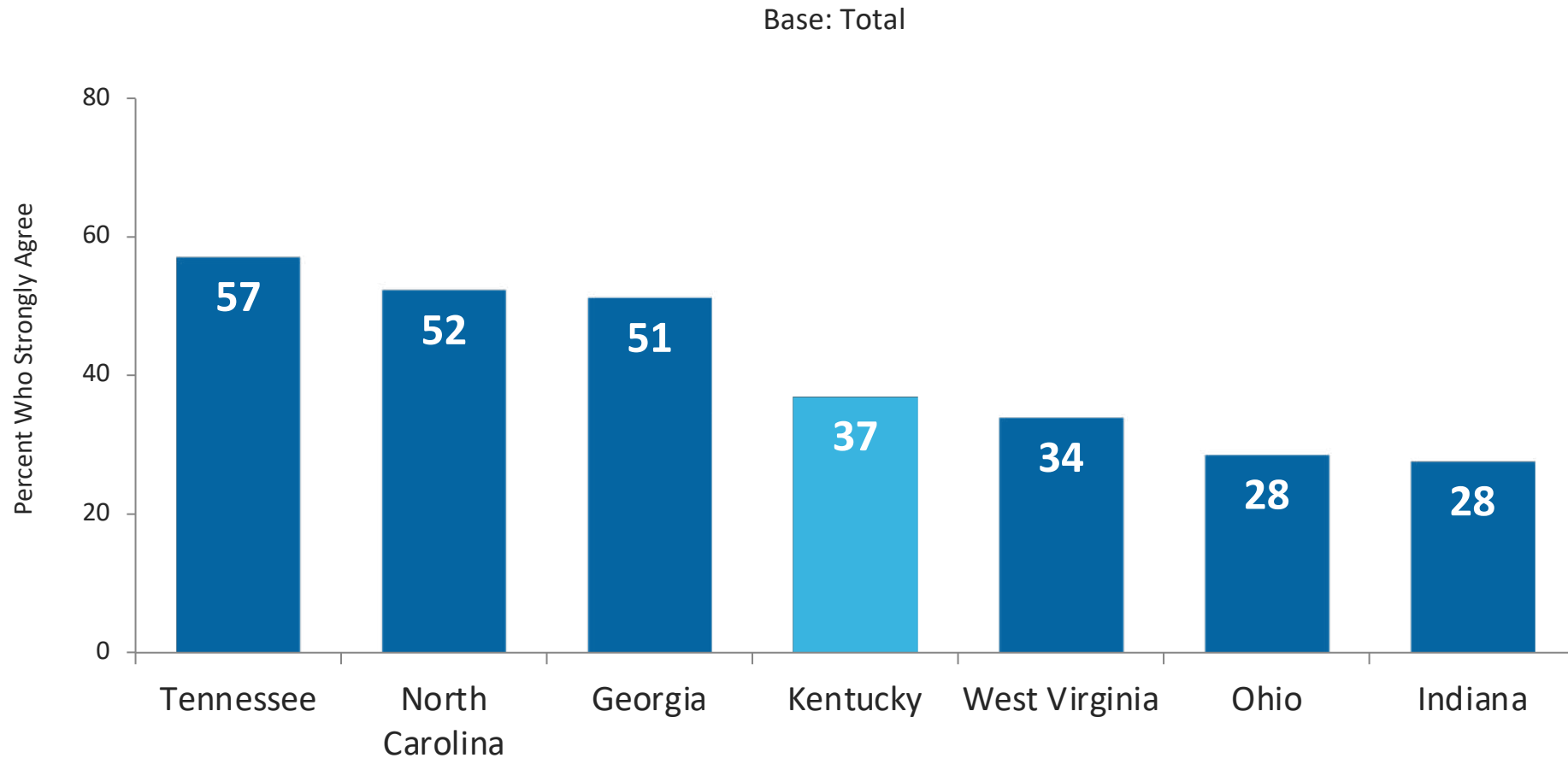
# Kentucky's Image vs. Competition — Sightseeing



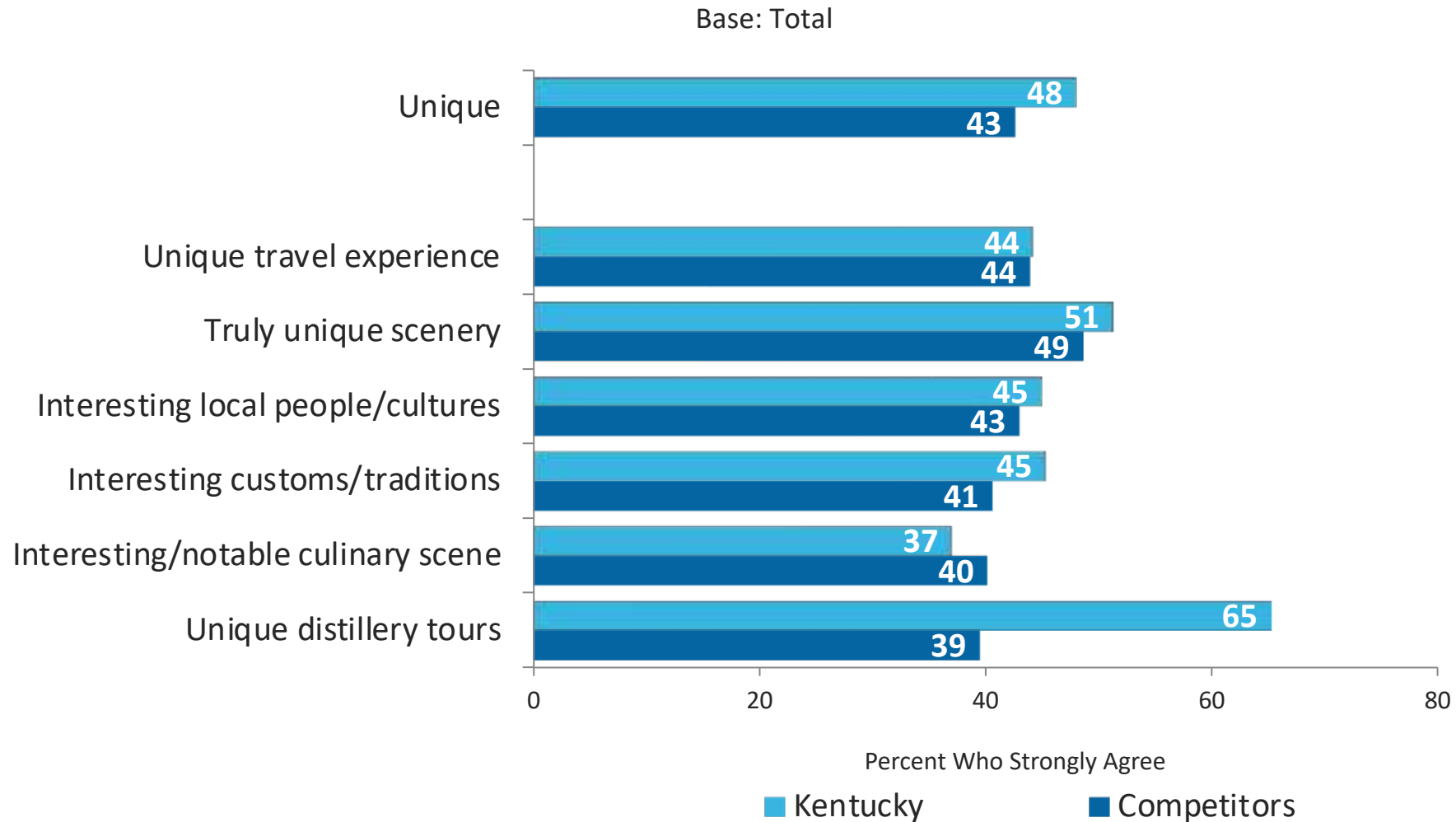
# Kentucky's Image vs. Competition — Popular



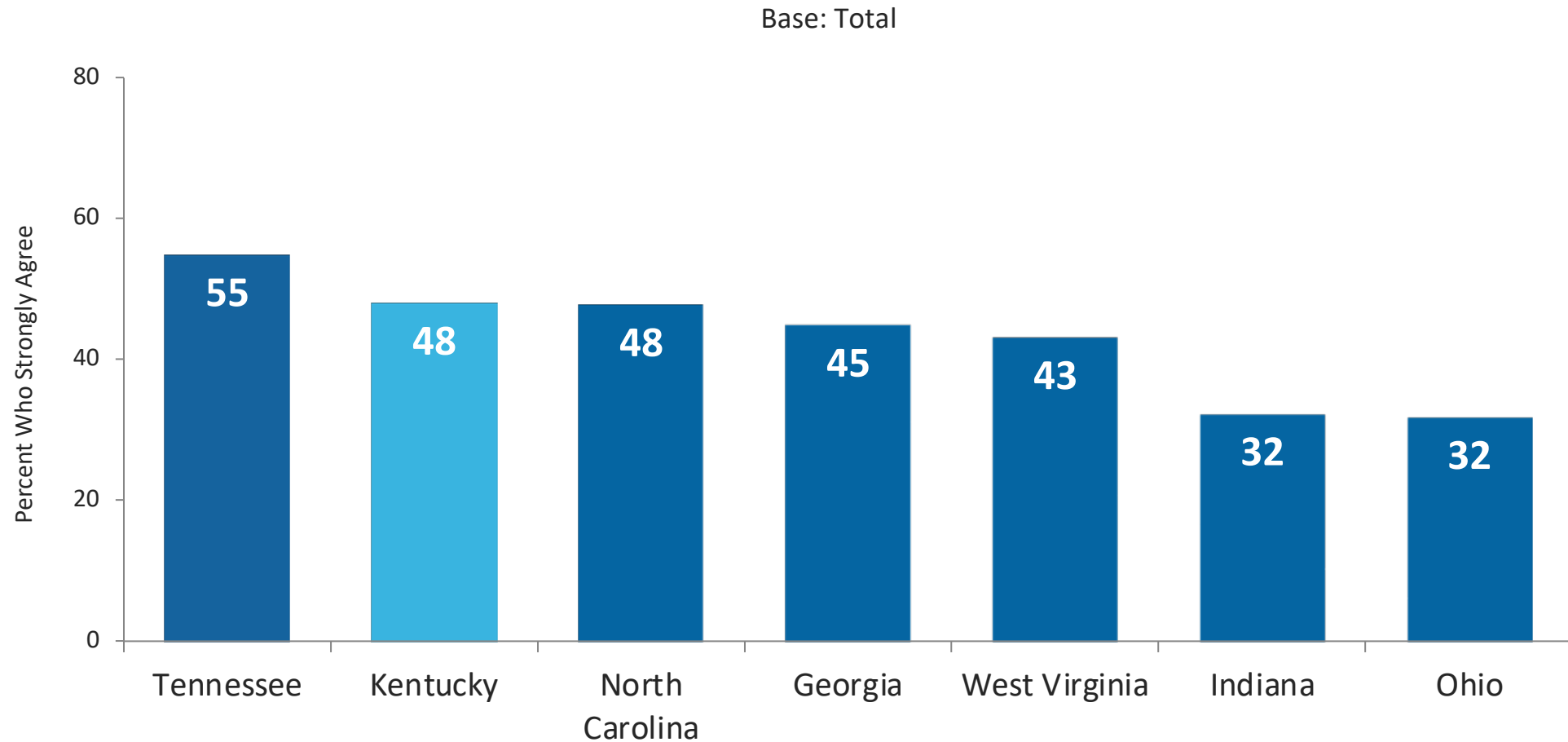
# Kentucky's Image vs. Competition — Popular



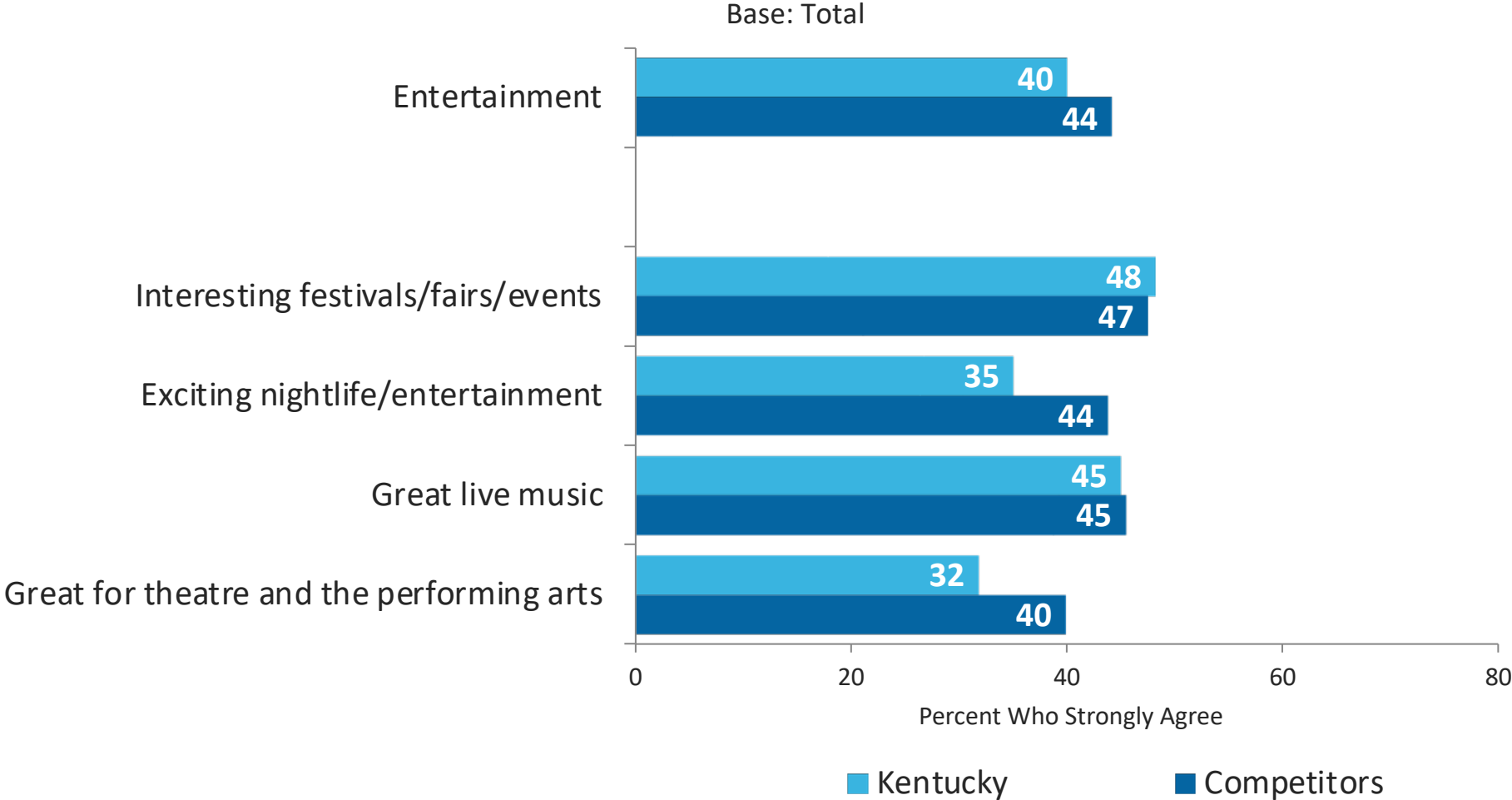
# Kentucky's Image vs. Competition — Unique



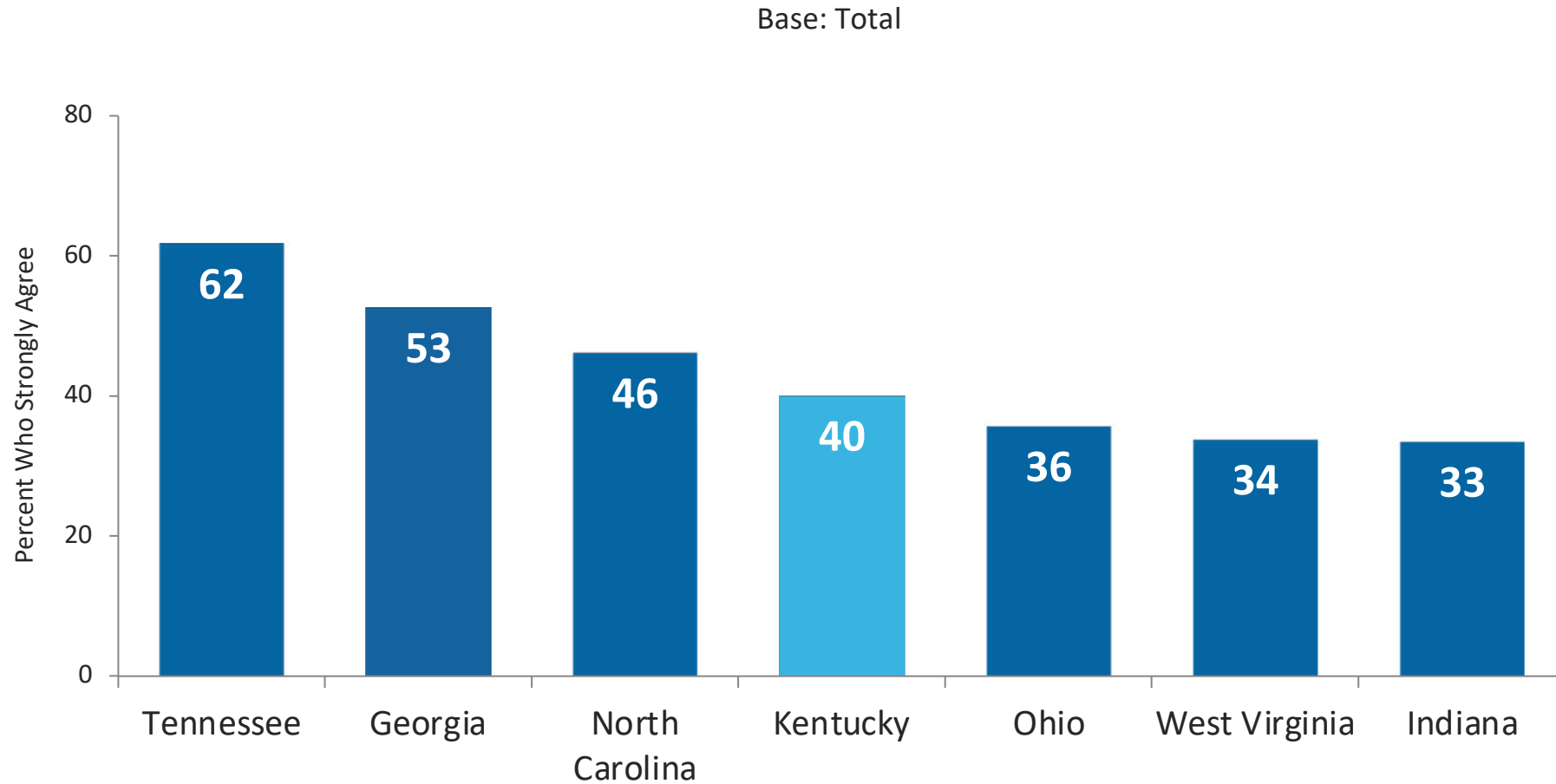
# Kentucky's Image vs. Competition — Unique



# Kentucky's Image vs. Competition — Entertainment

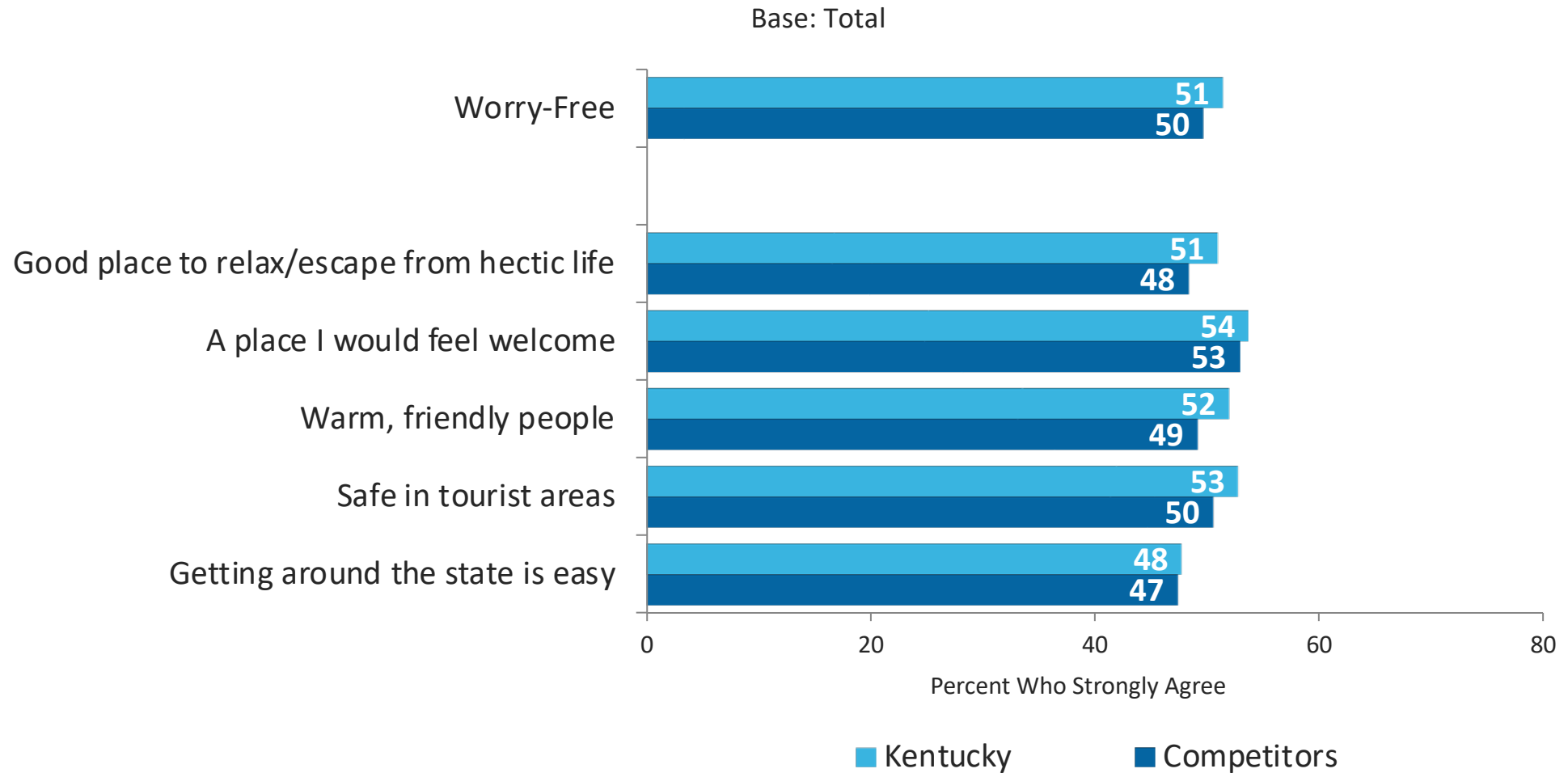


# Kentucky's Image vs. Competition — Entertainment

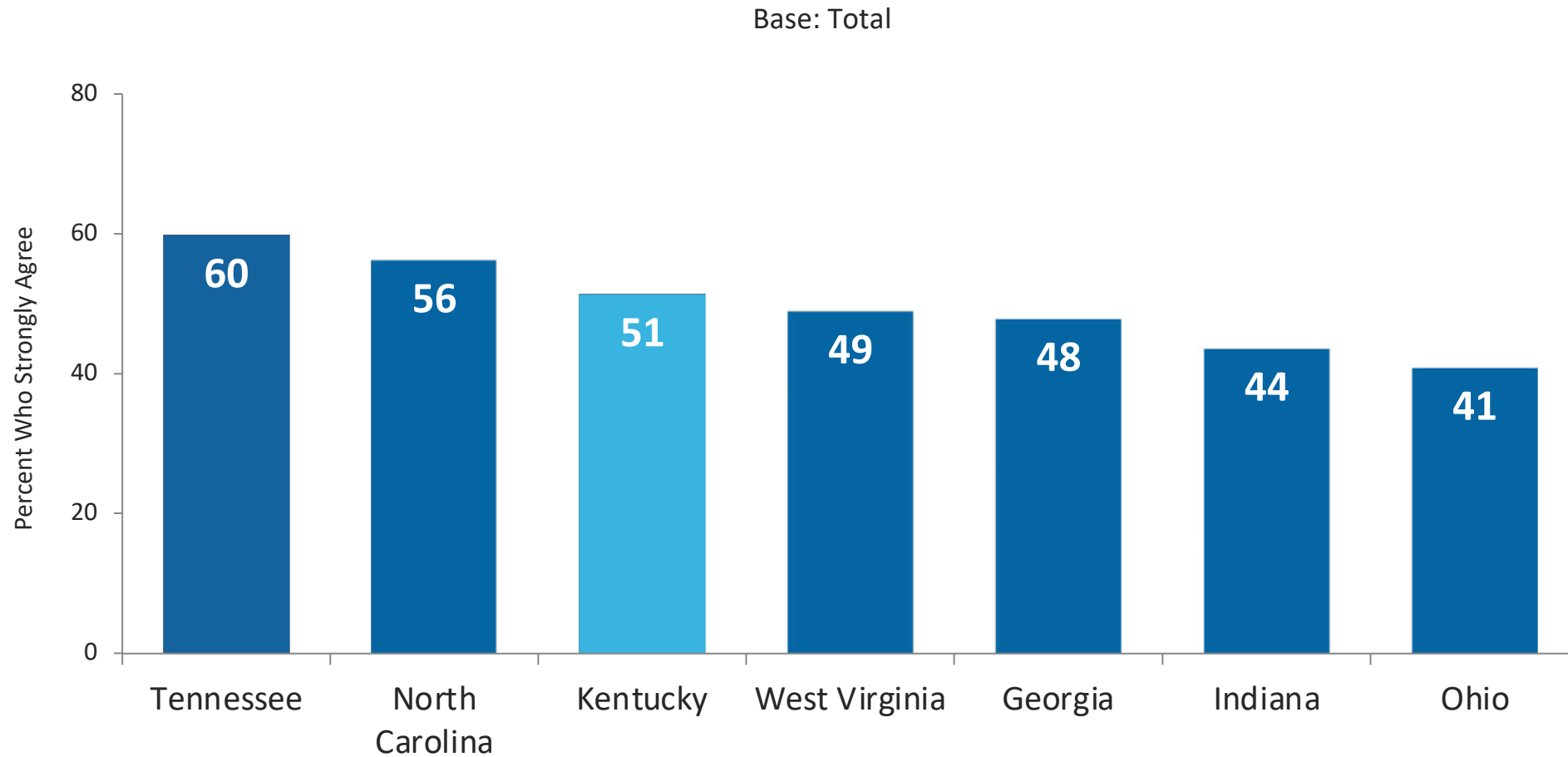




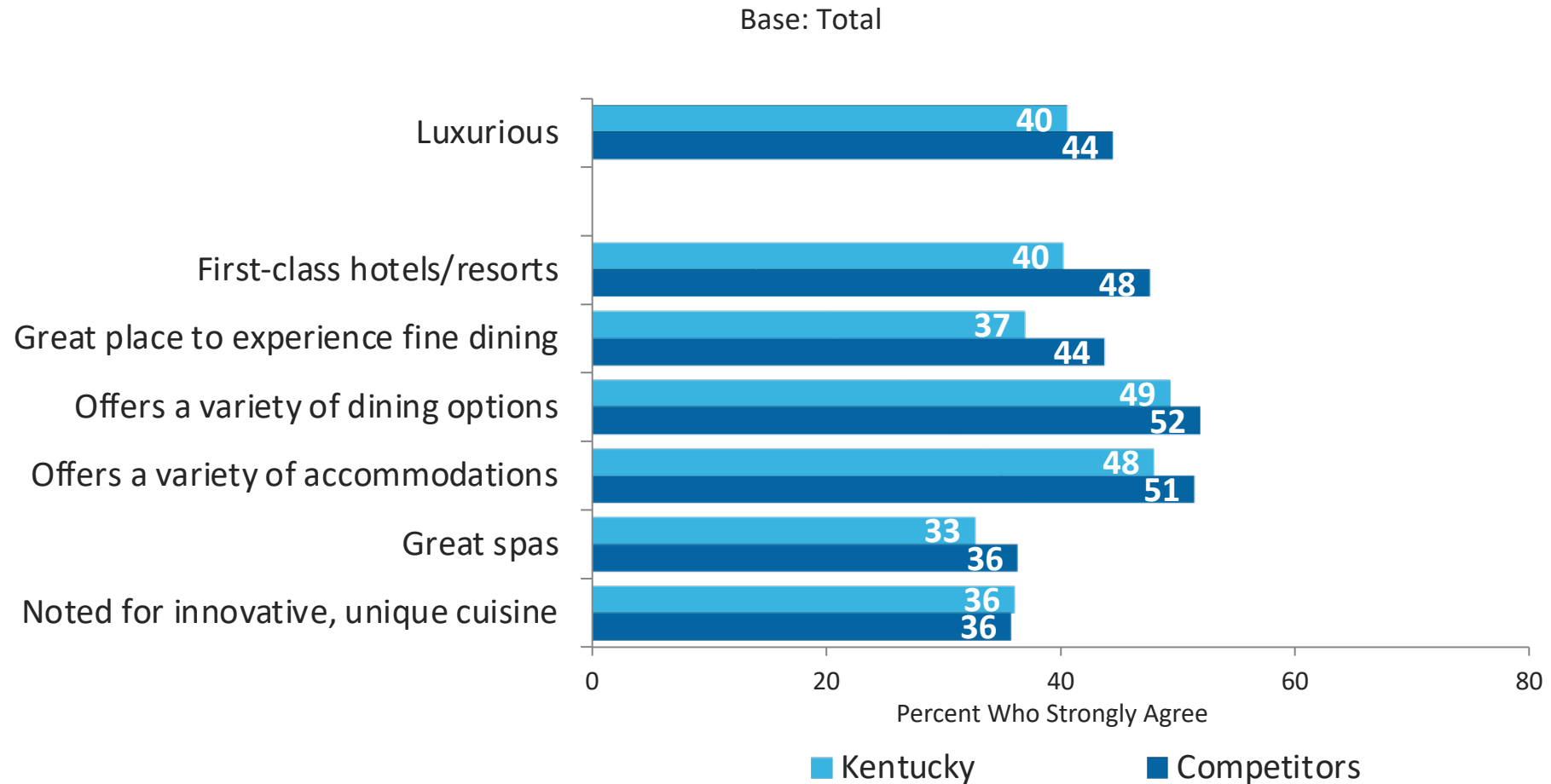
# Kentucky's Image vs. Competition — Worry-Free



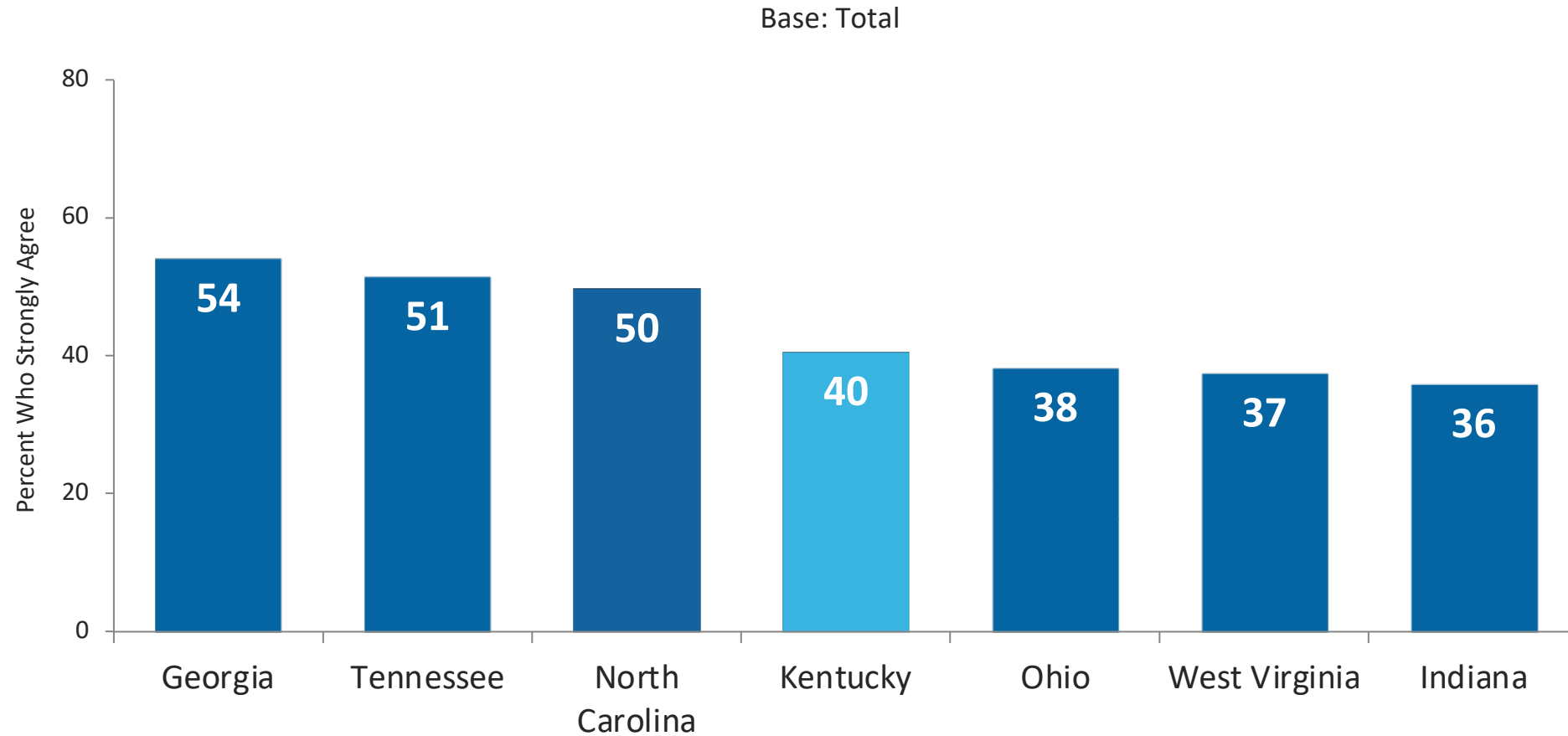
# Kentucky's Image vs. Competition — Worry-Free



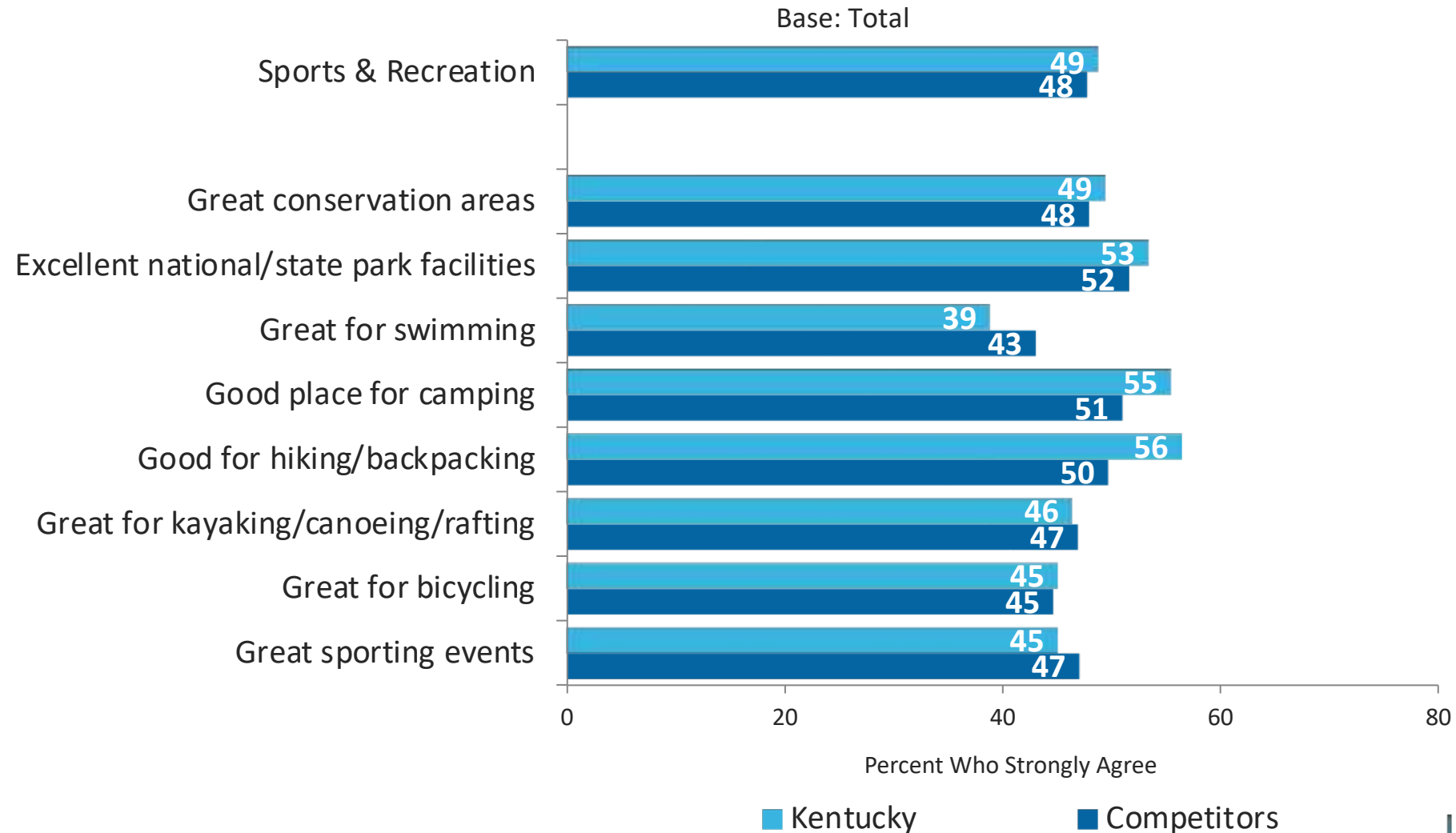
# Kentucky's Image vs. Competition — Luxurious



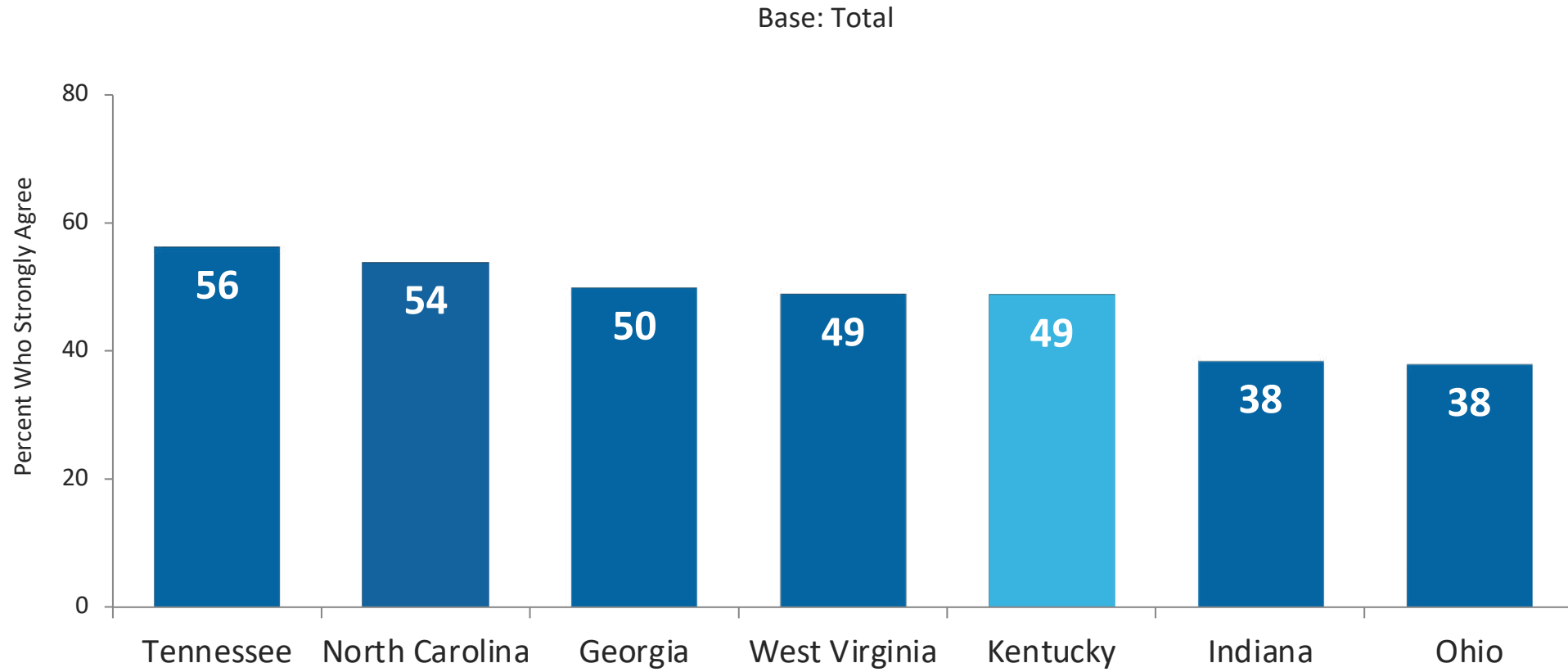
# Kentucky's Image vs. Competition — Luxurious



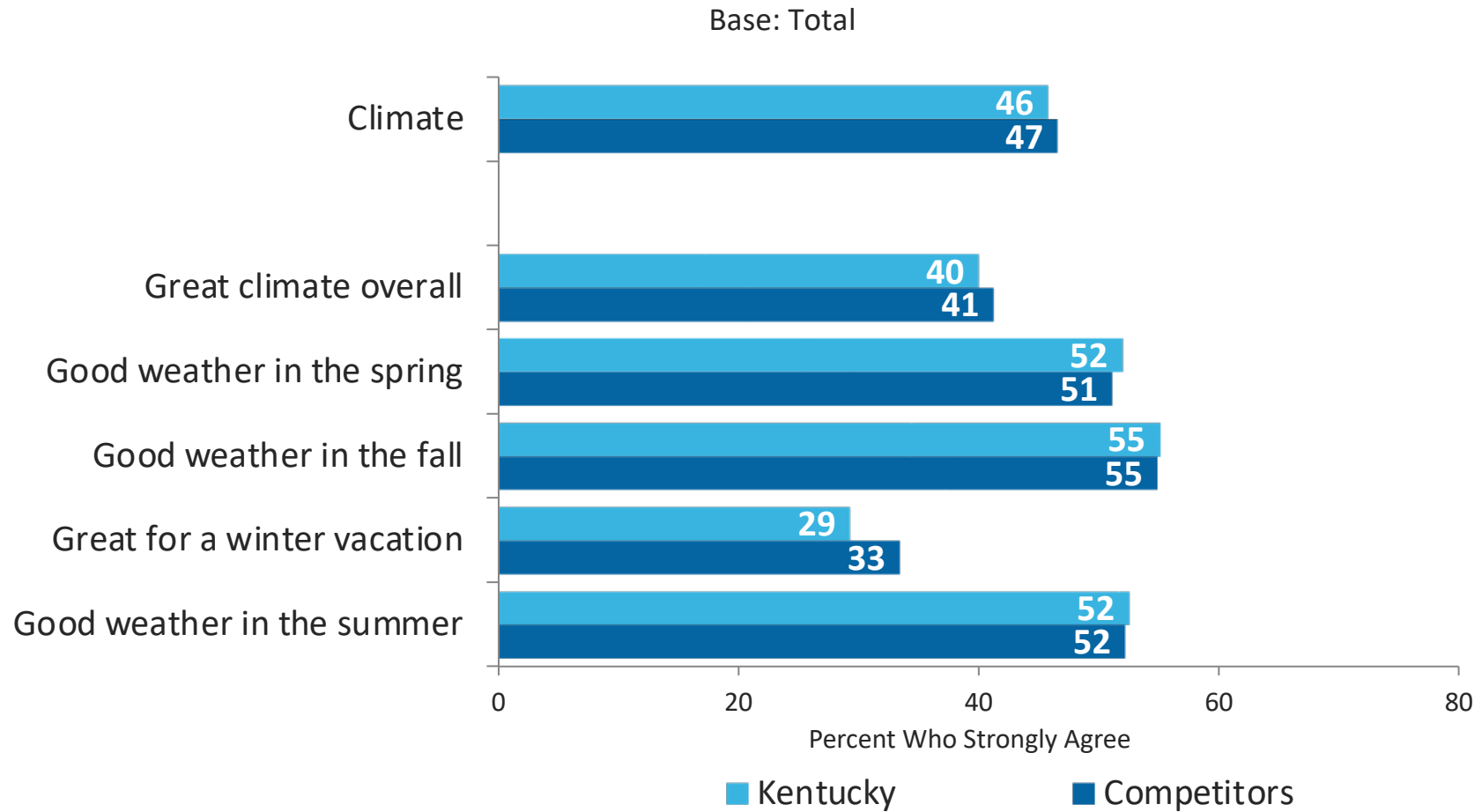
# Kentucky's Image vs. Competition — Sports & Recreation



# Kentucky's Image vs. Competition — Sports & Recreation

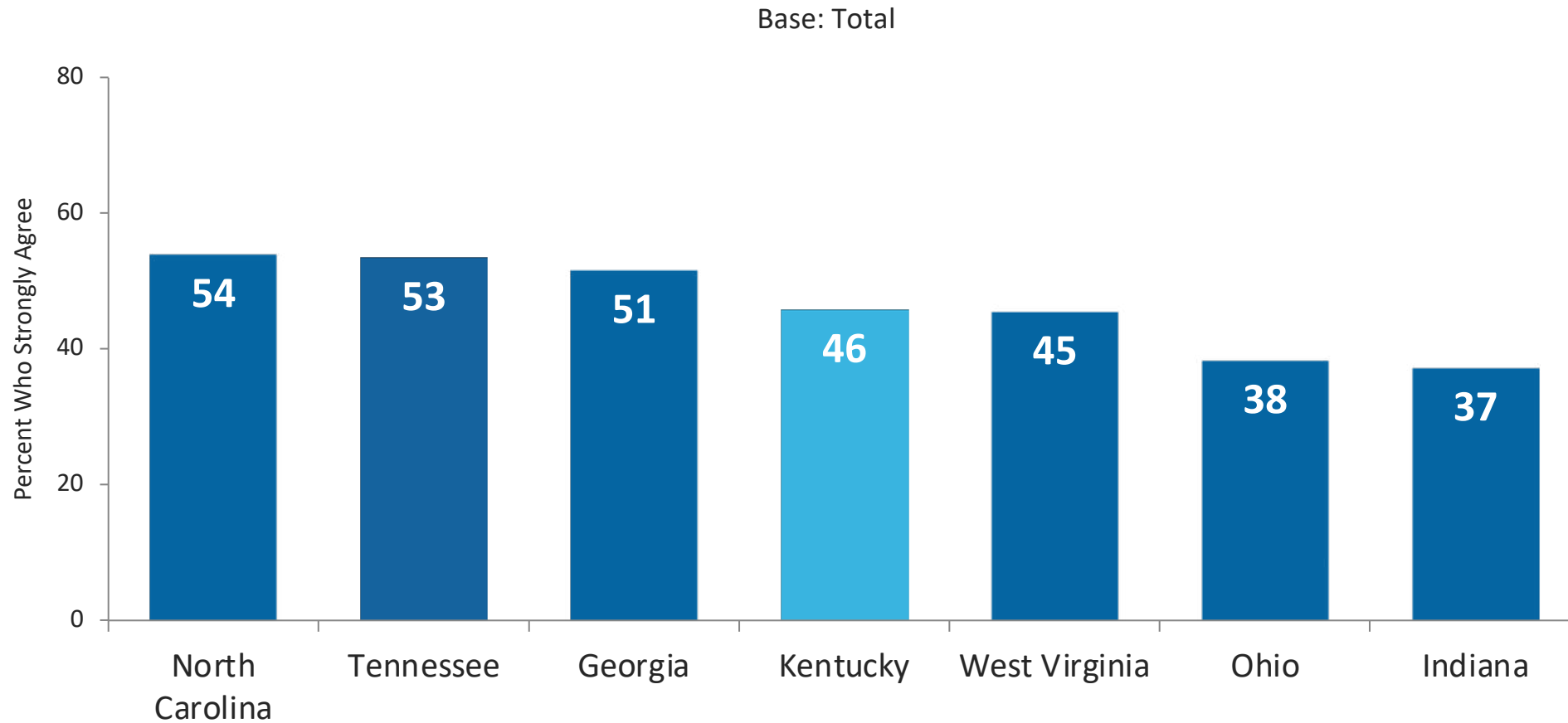


# Kentucky's Image vs. Competition — Climate

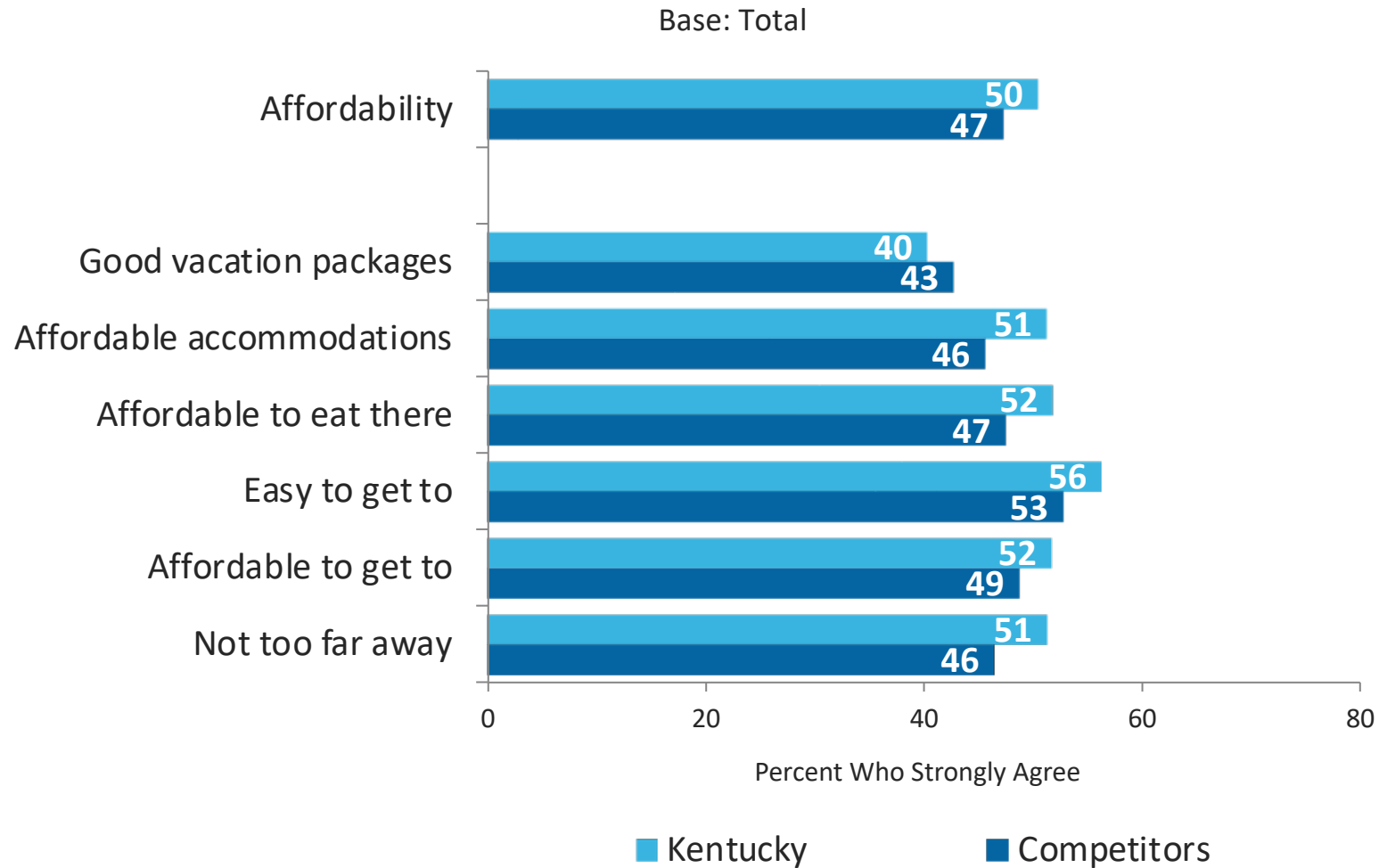




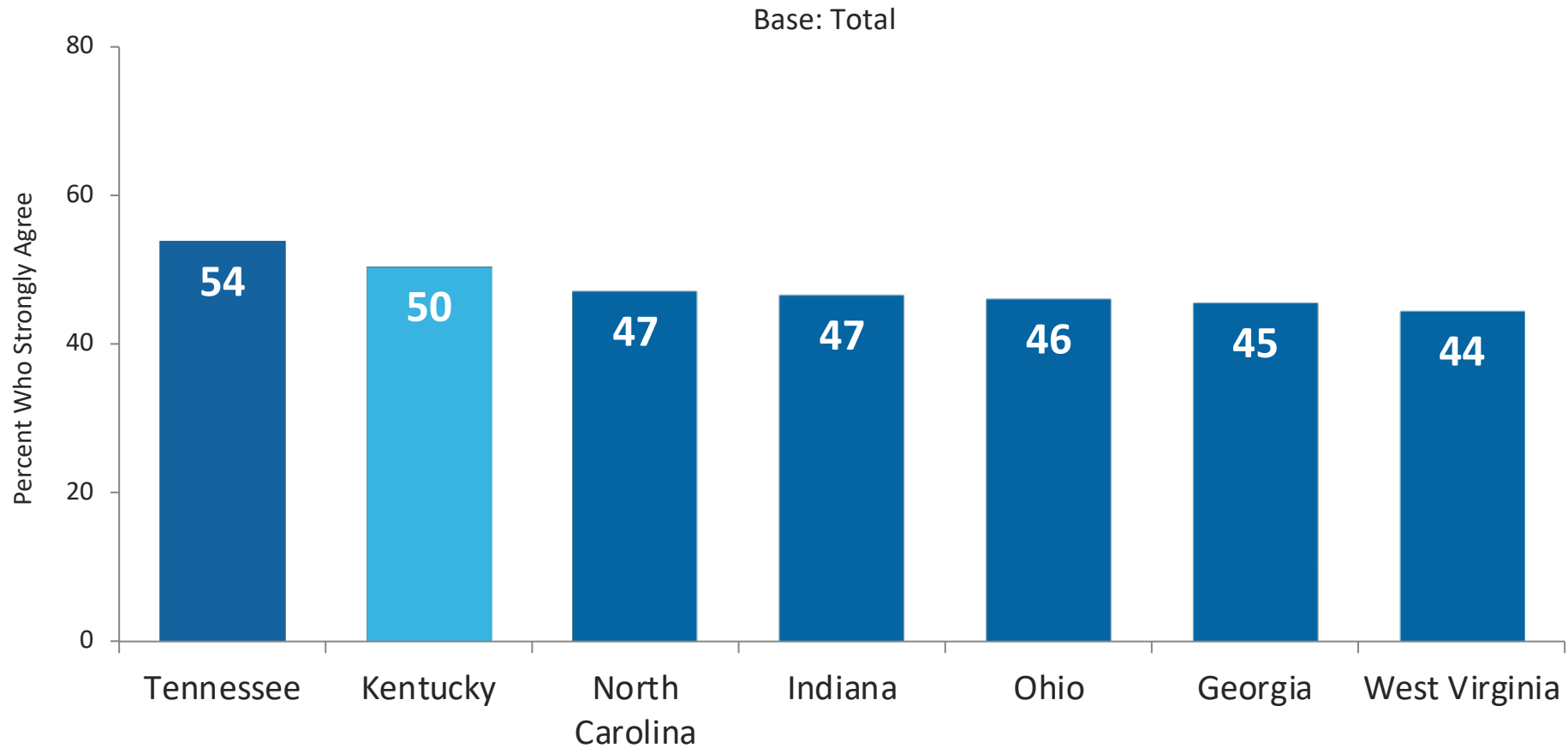
# Kentucky's Image vs. Competition — Climate



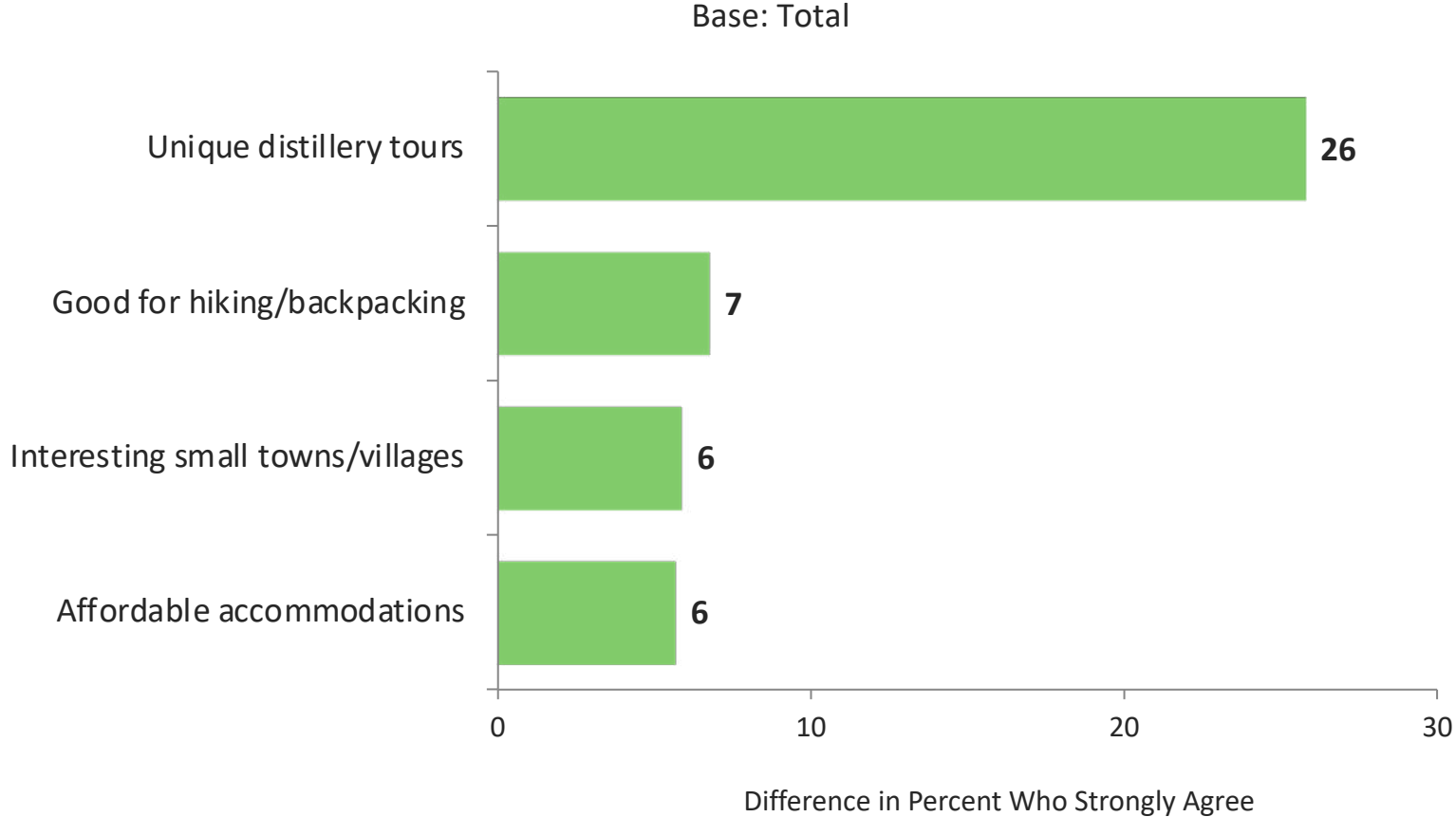
# Kentucky's Image vs. Competition — Affordability



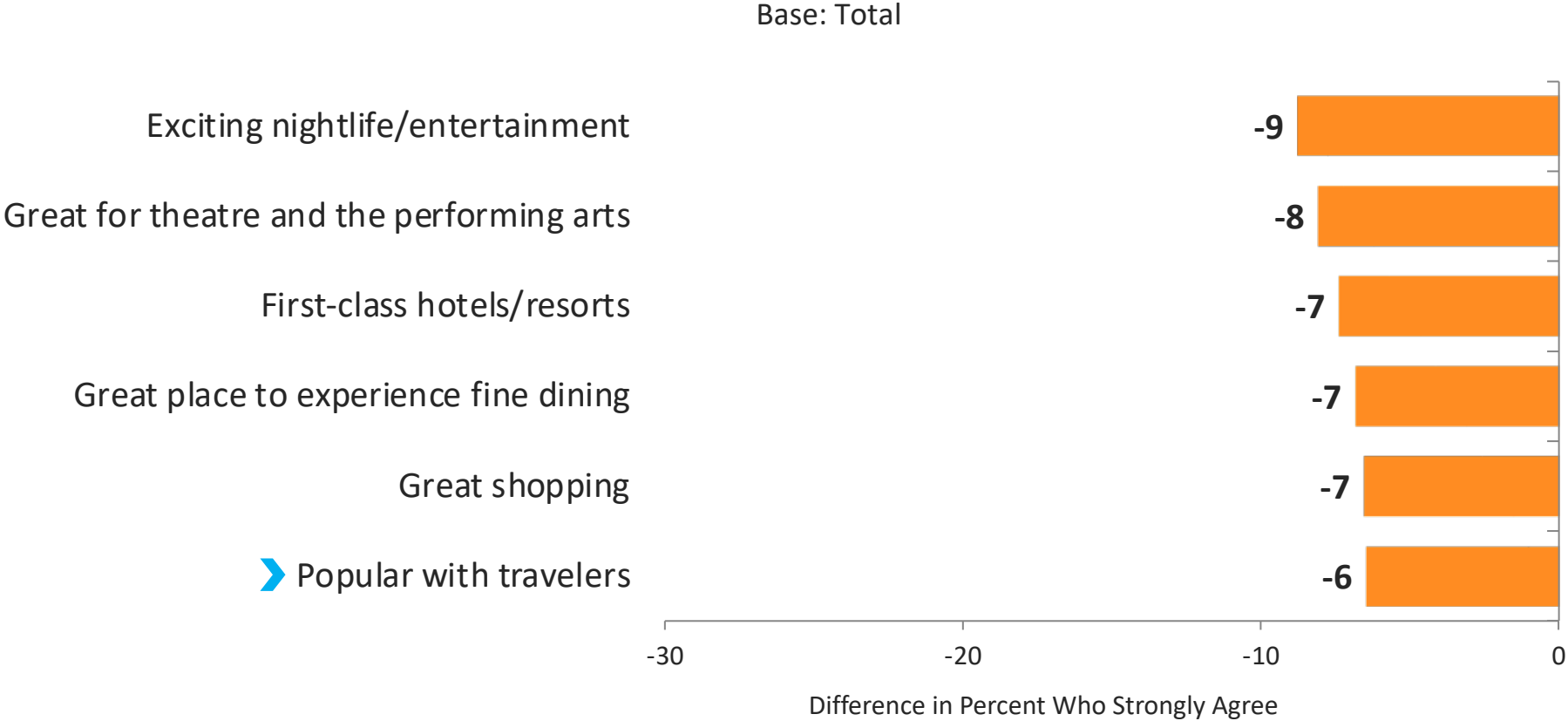
# Kentucky's Image vs. Competition — Affordability



# Kentucky's Image Strengths vs. Competition



# Kentucky's Image Weaknesses vs. Competition



\* 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

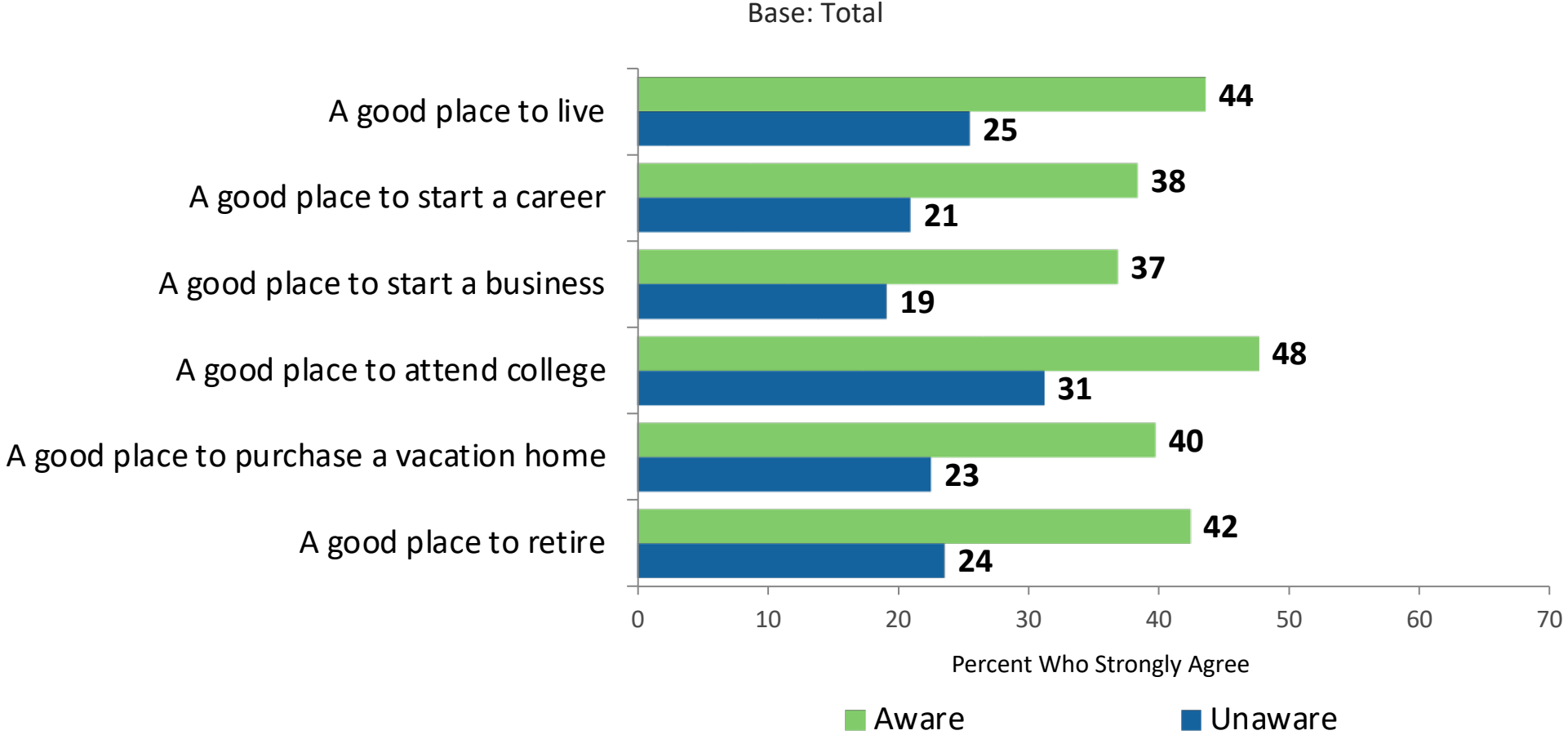
- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out 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 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.



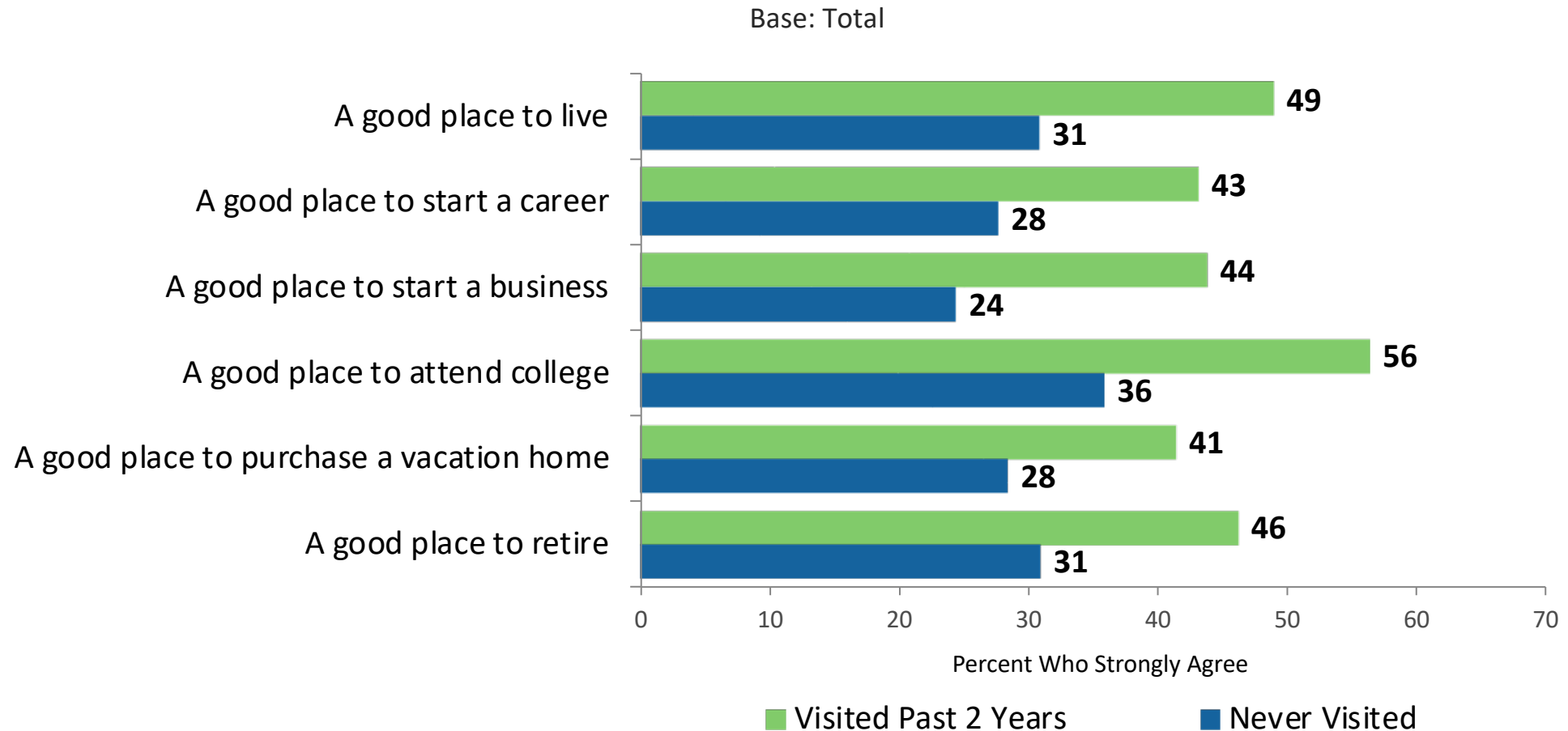
# Halo Effect Analysis (Cont.)

- 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.

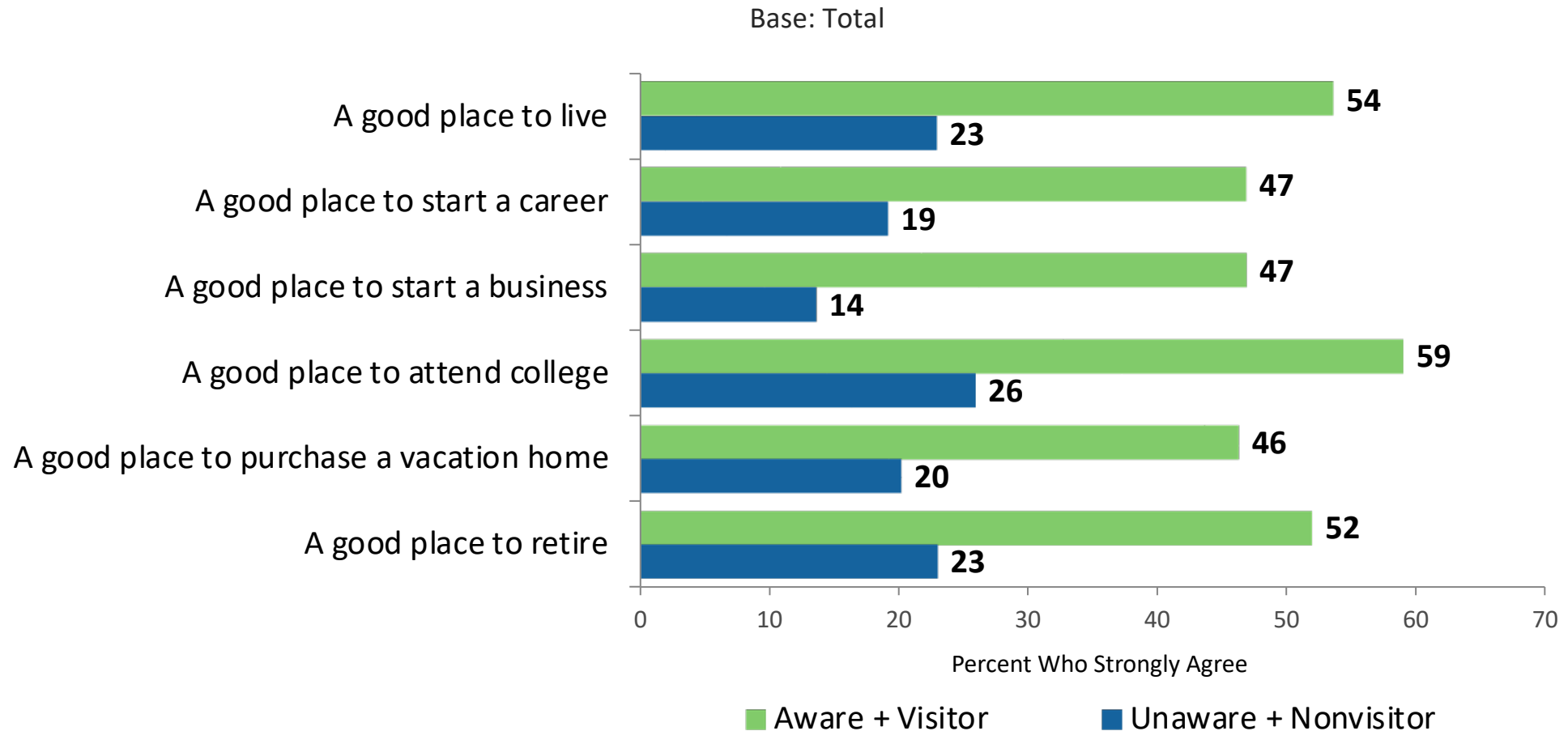
# Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image



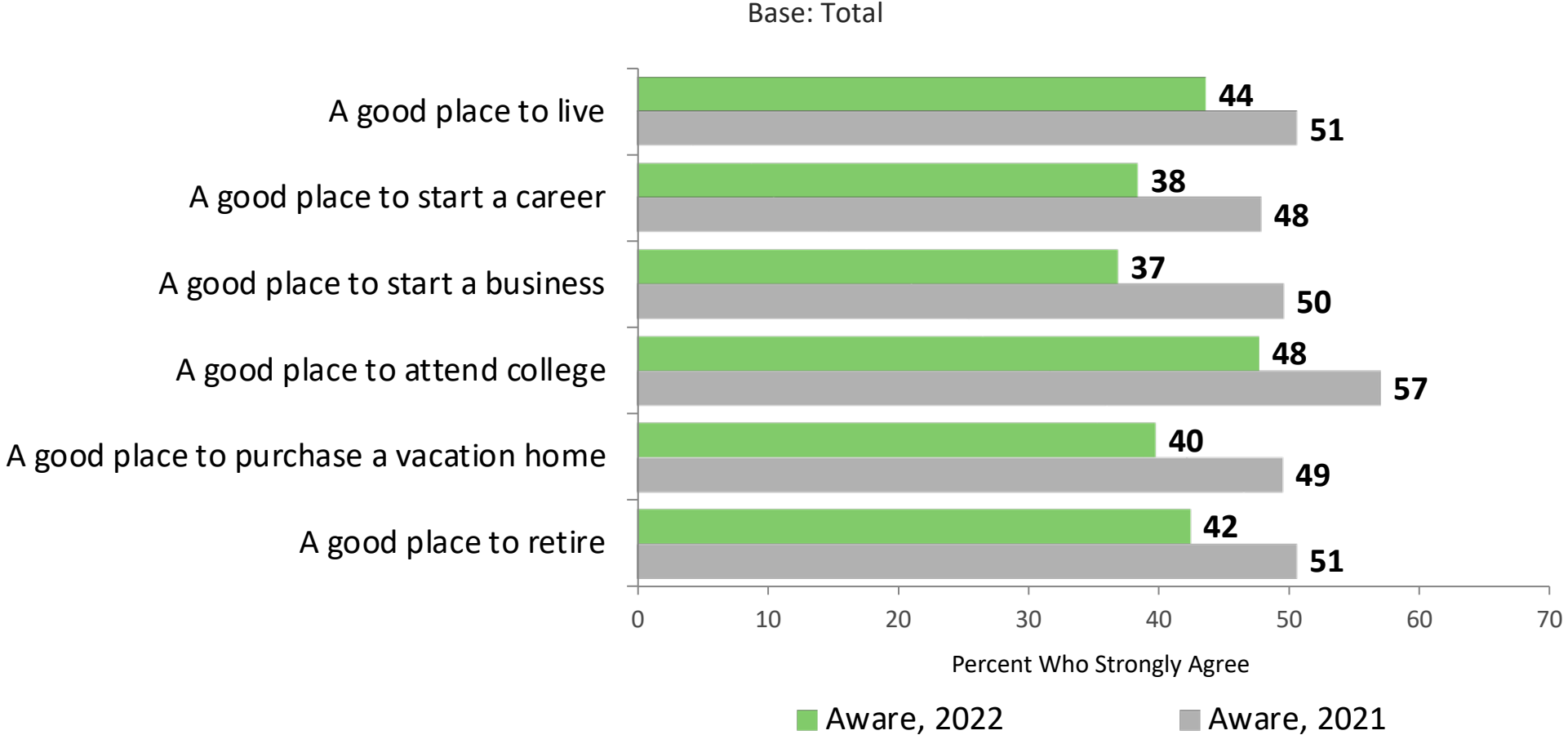
# Impact of *Visitation* on Kentucky's Economic Development Image



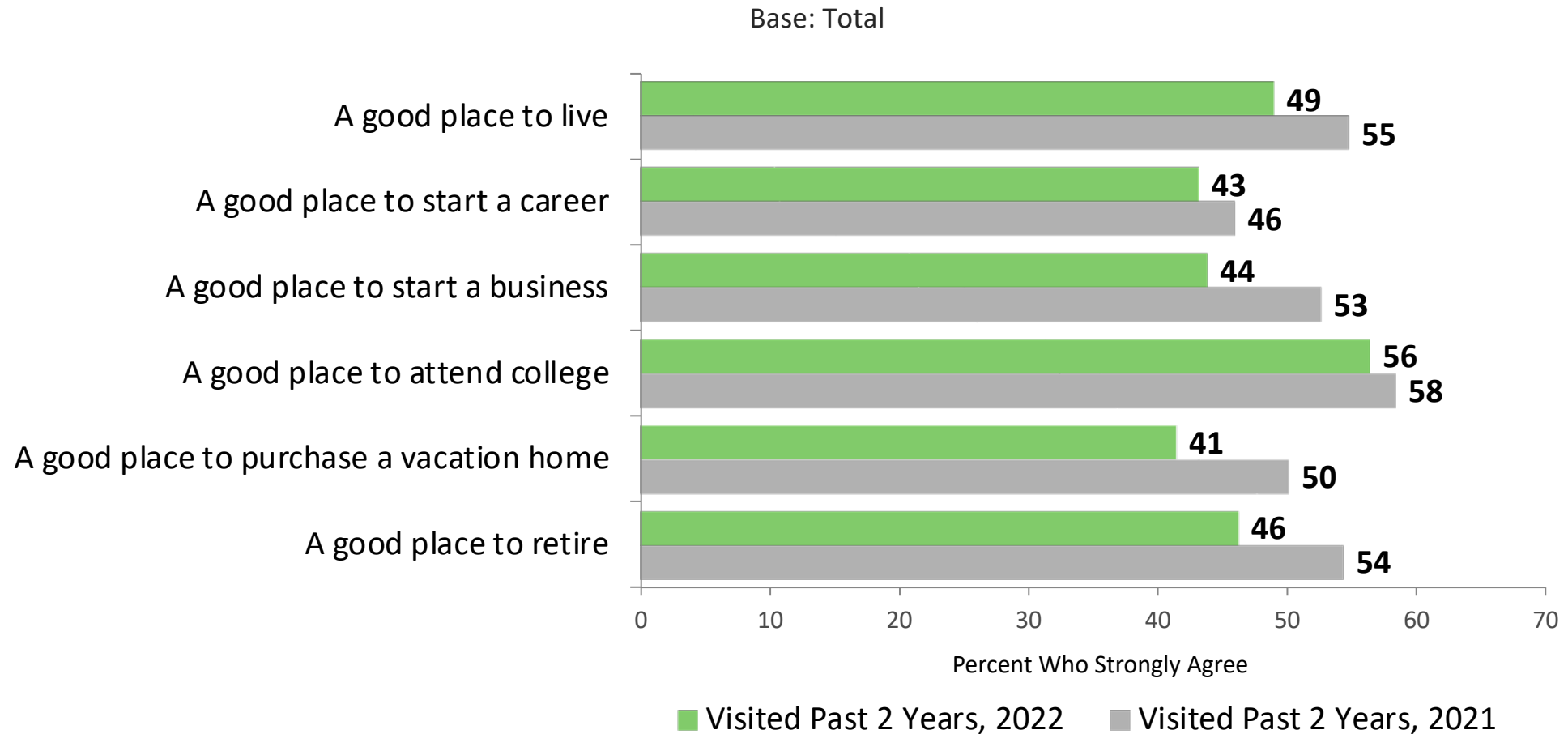
# Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image



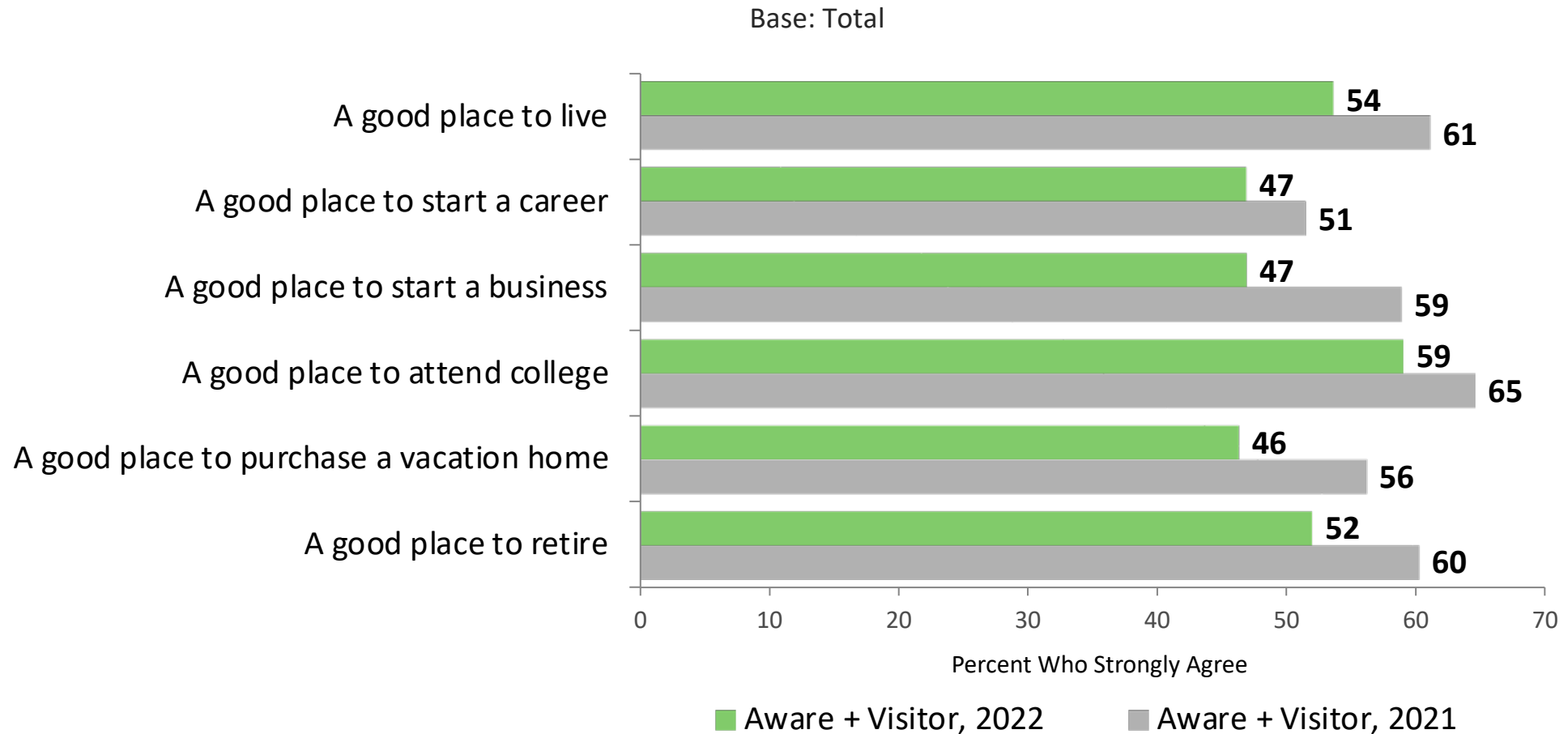
# Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image – 2022 vs. 2021



# Impact of *Visitation* on Kentucky's Economic Development Image – 2022 vs. 2021



# Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image – 2022 vs. 2021







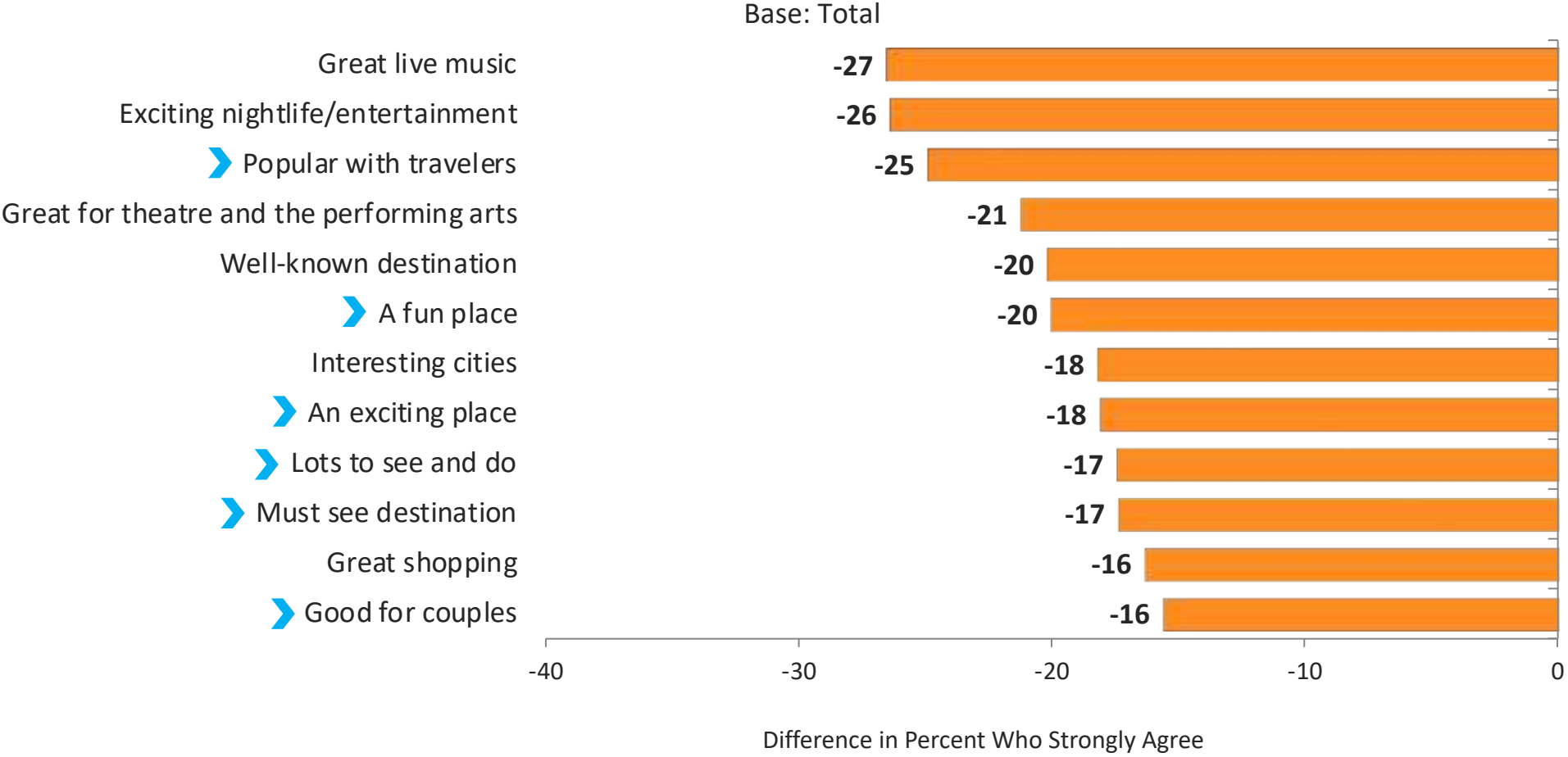
**Longwoods**  
INTERNATIONAL

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

# Kentucky's Image Strengths vs. Tennessee

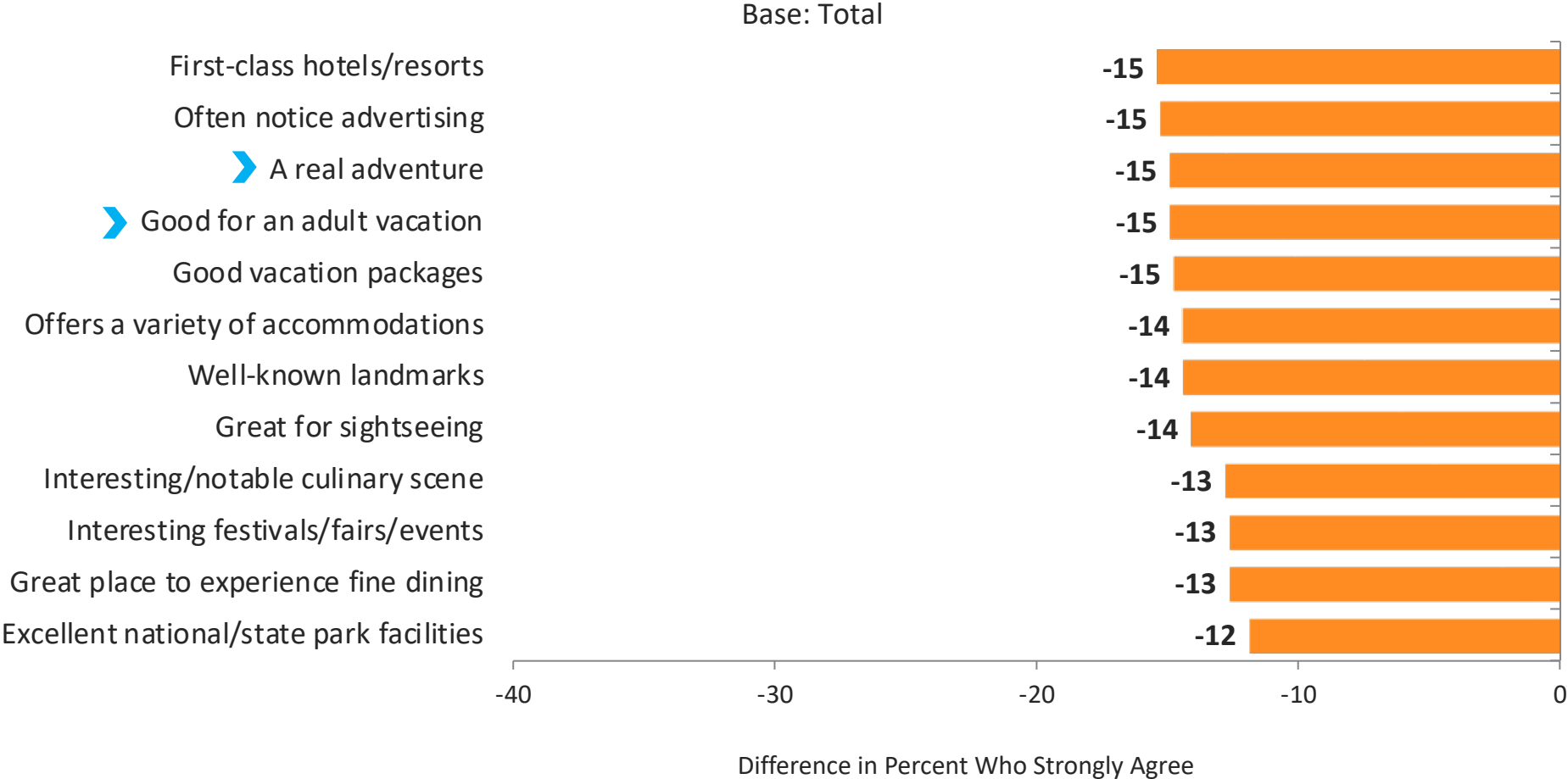
**THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE STRENGTHS VS.  
TENNESSEE**

# Kentucky's Image Weaknesses vs. Tennessee



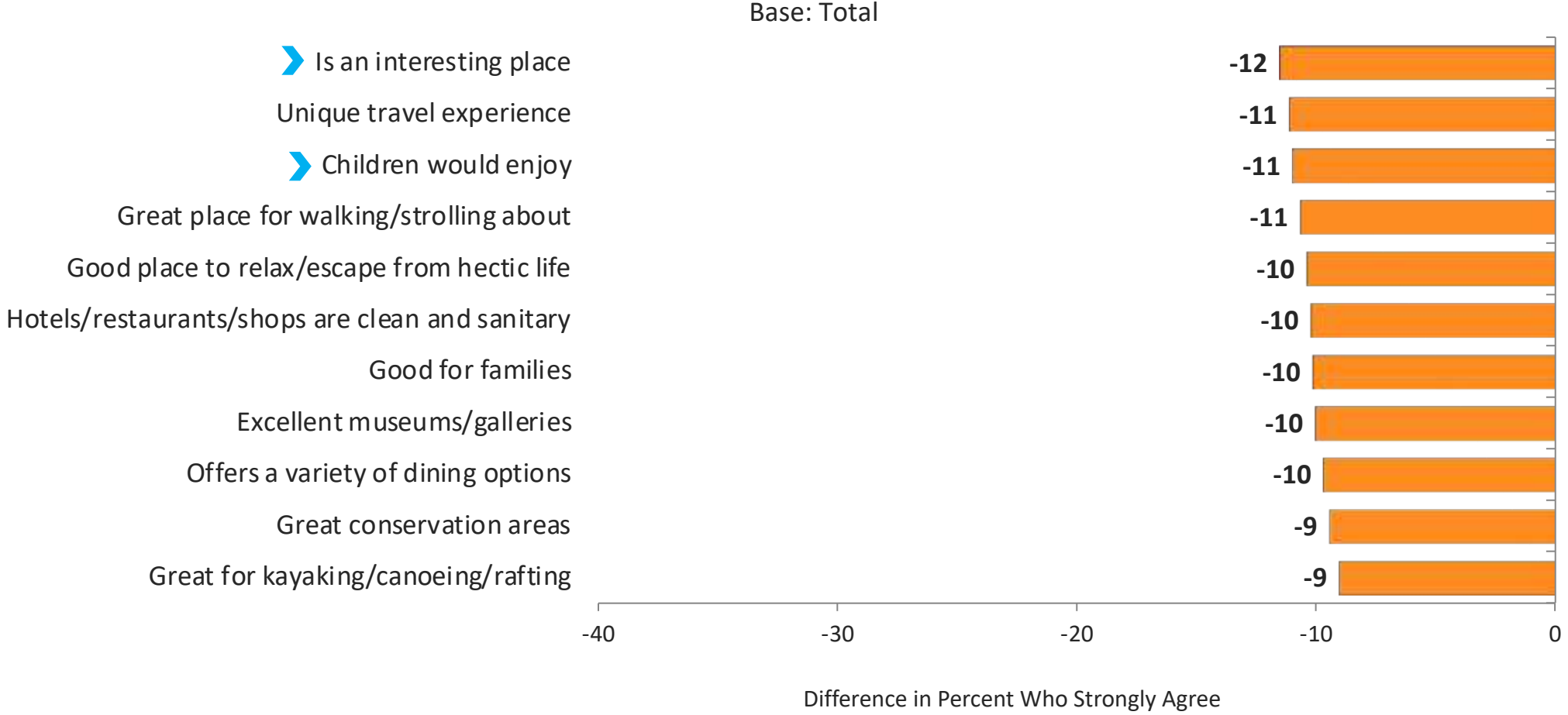
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



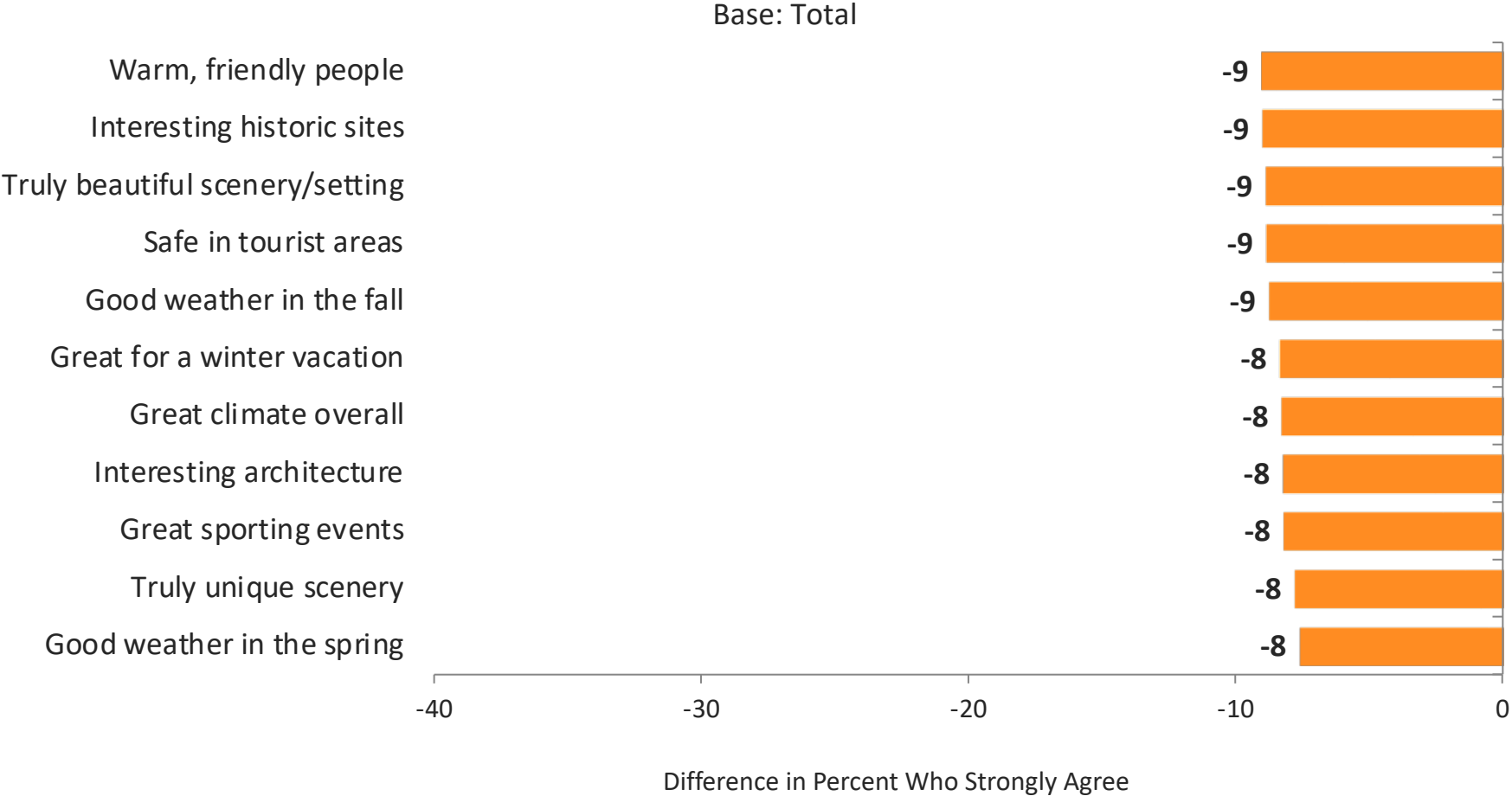
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

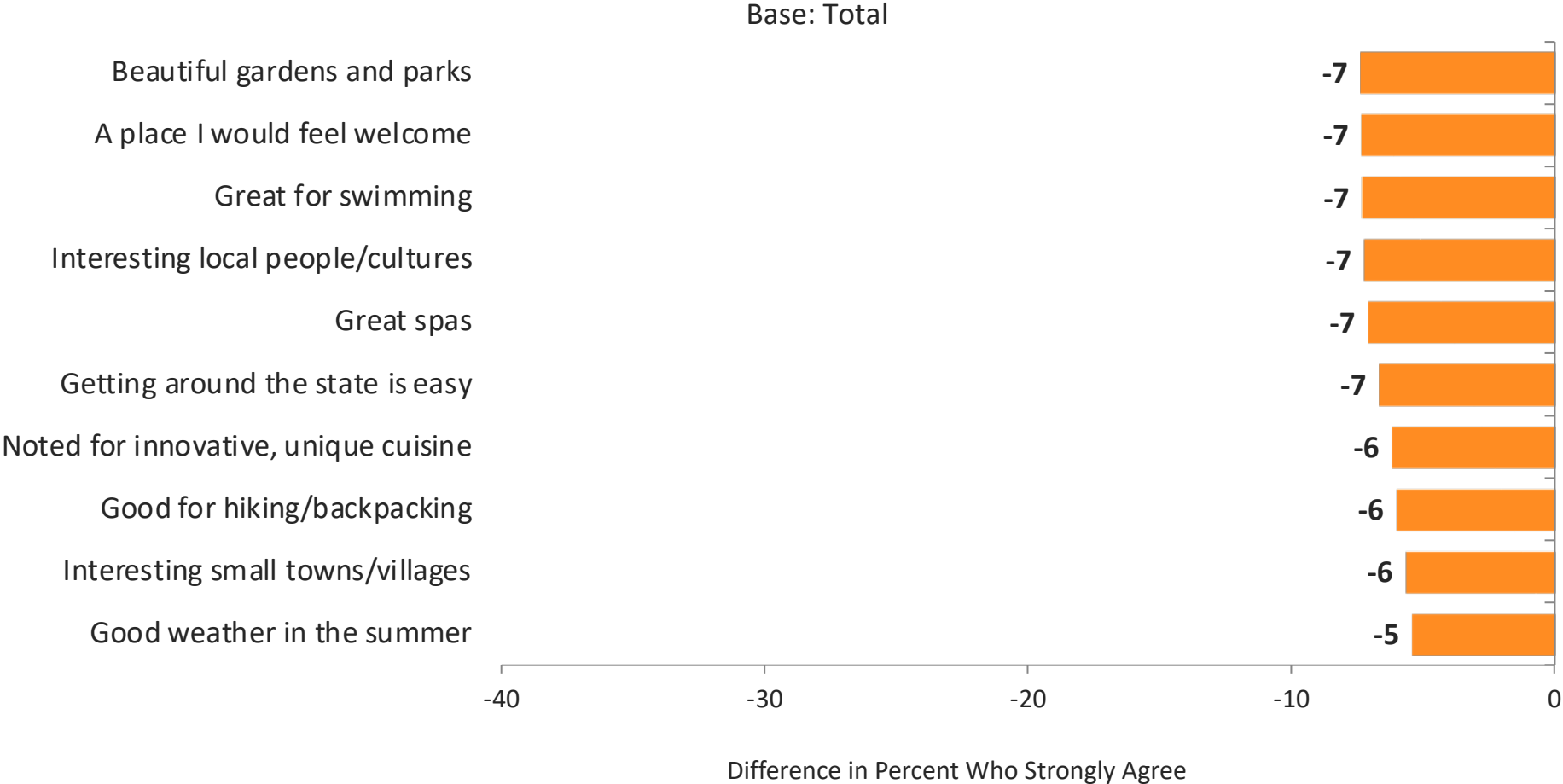


\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

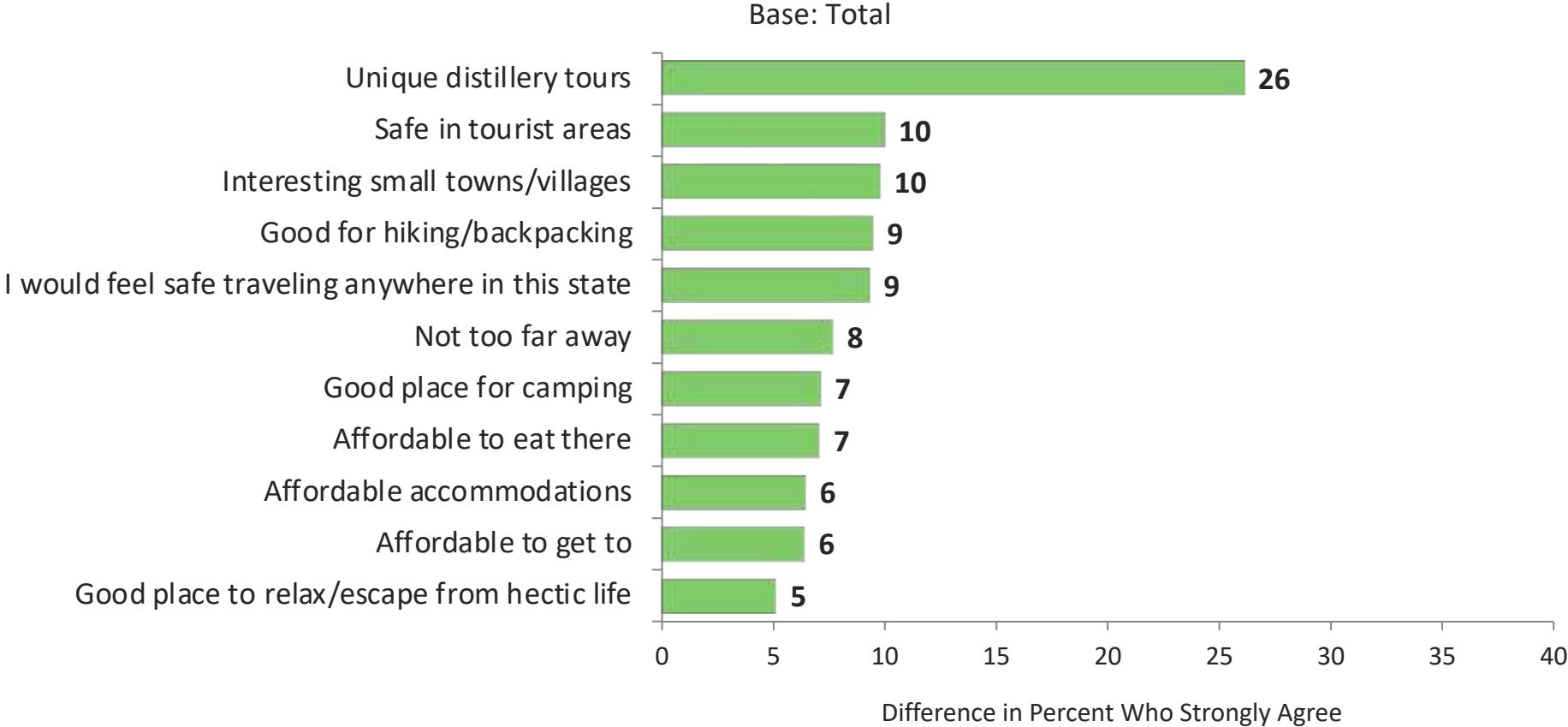


# Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

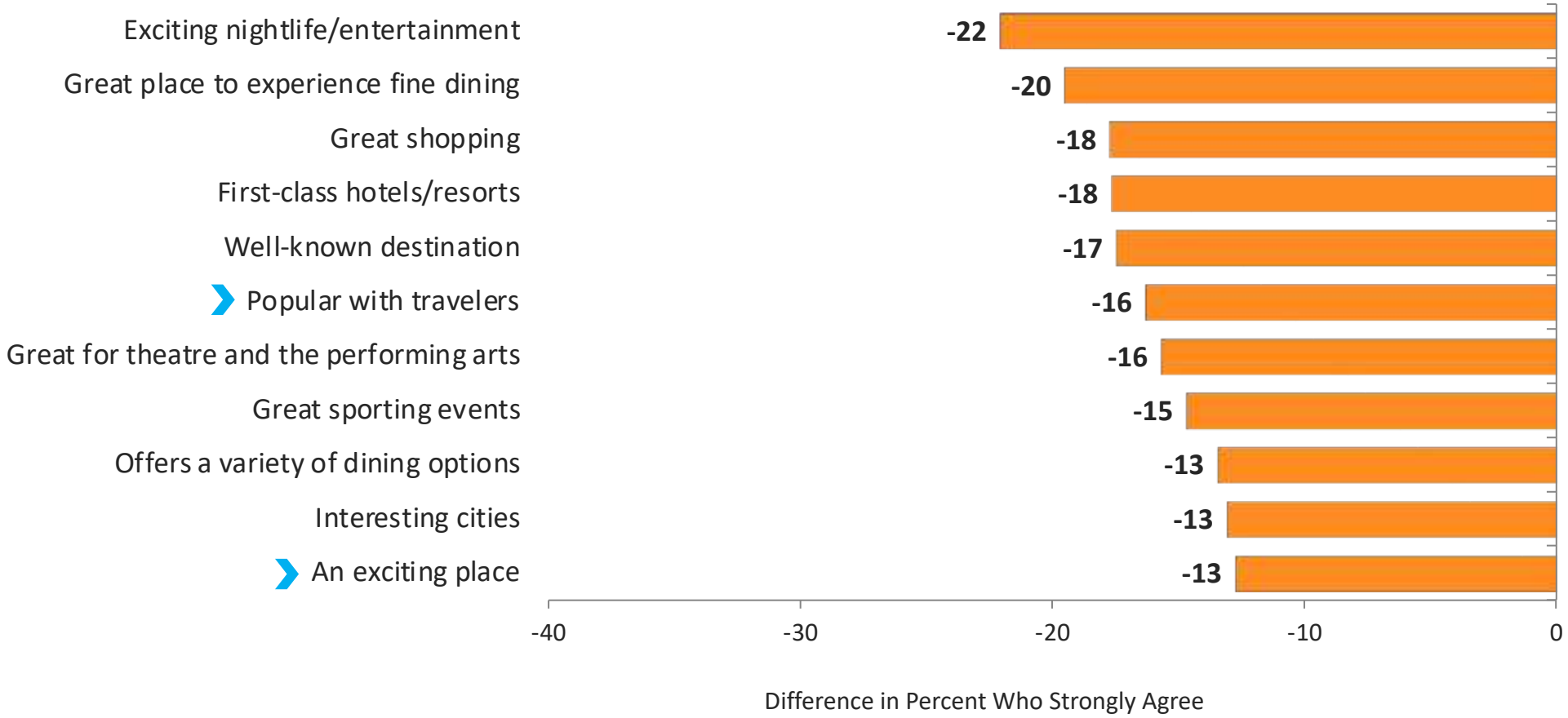




# Kentucky's Image Strengths vs. Georgia

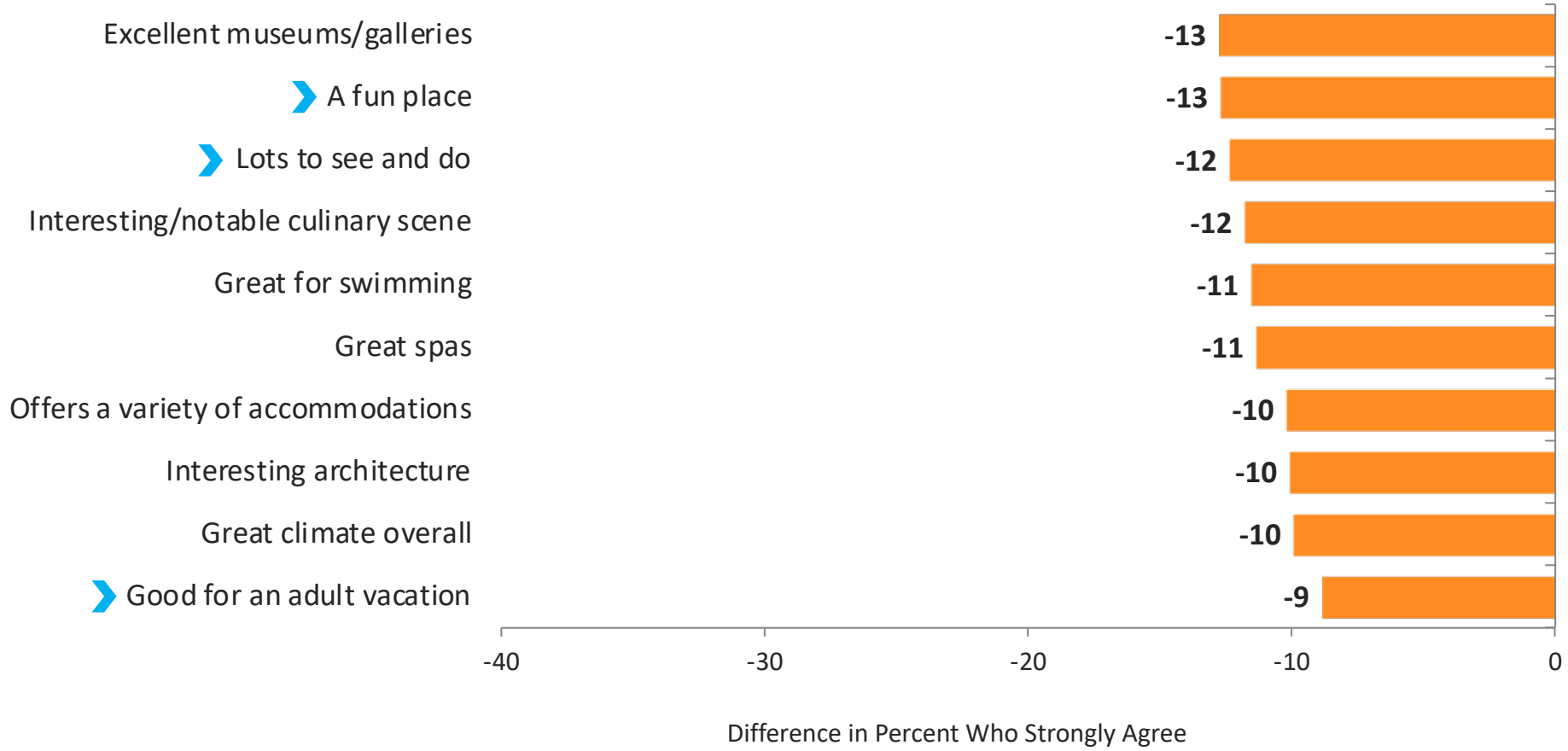


# Kentucky's Image Weaknesses vs. Georgia



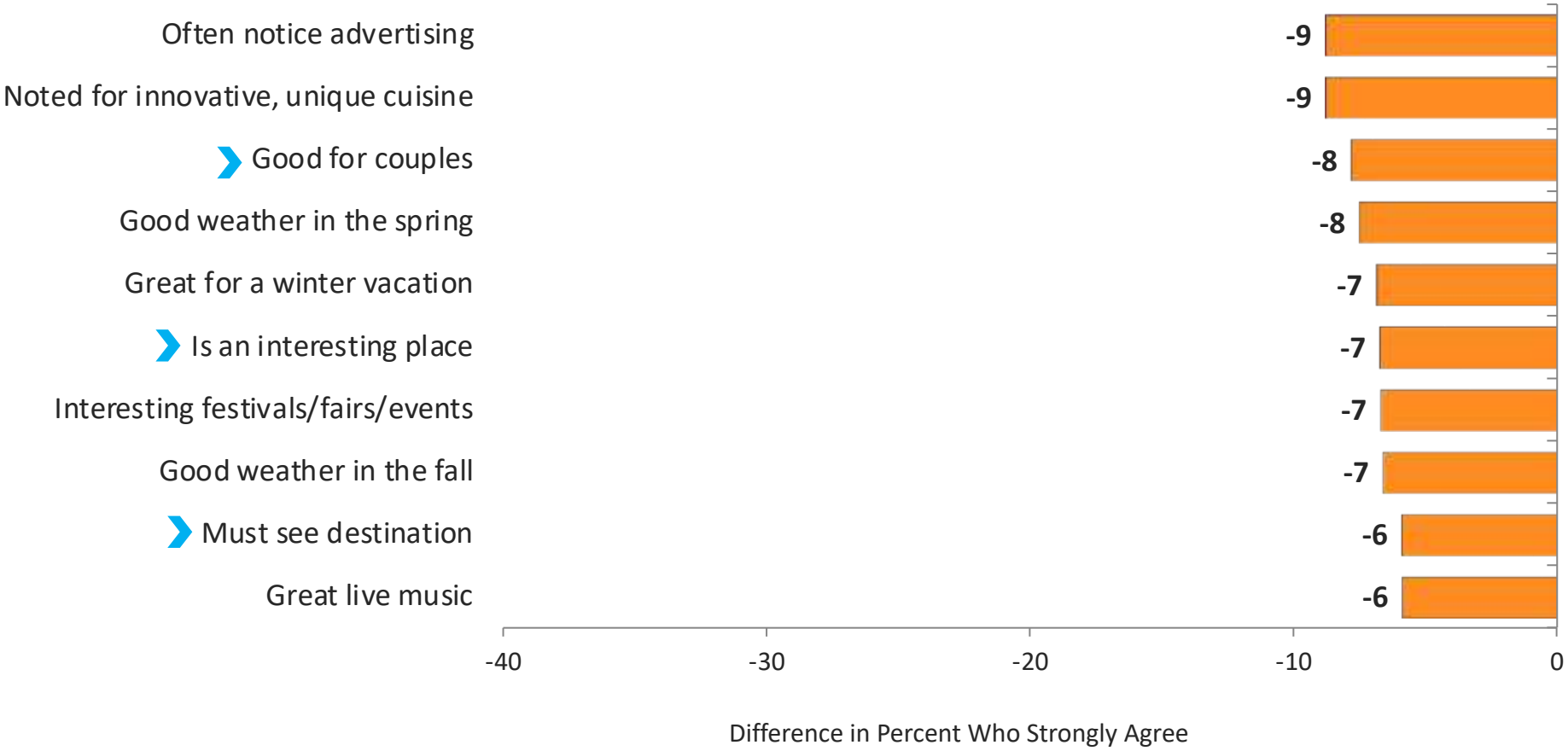
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



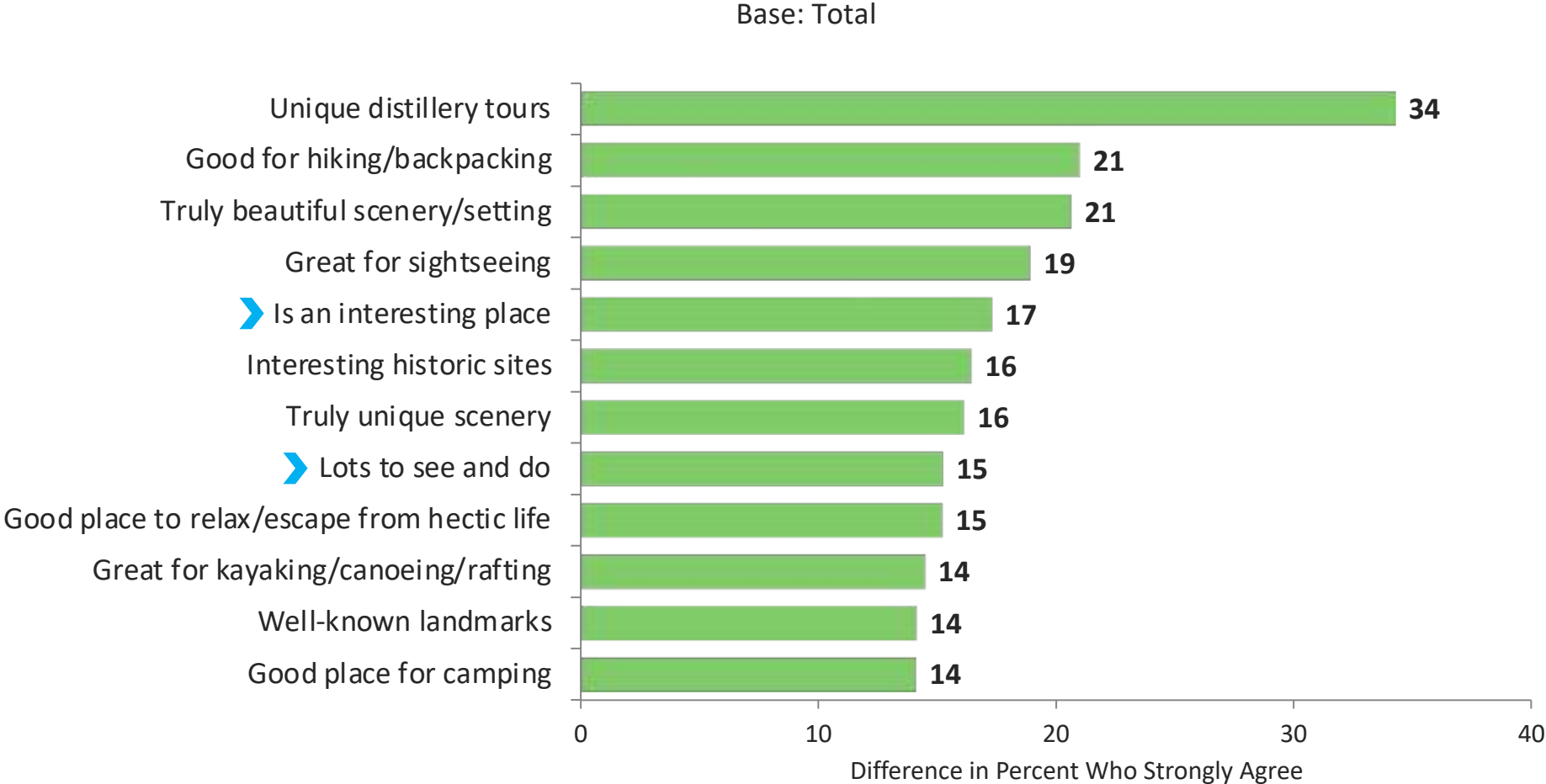
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



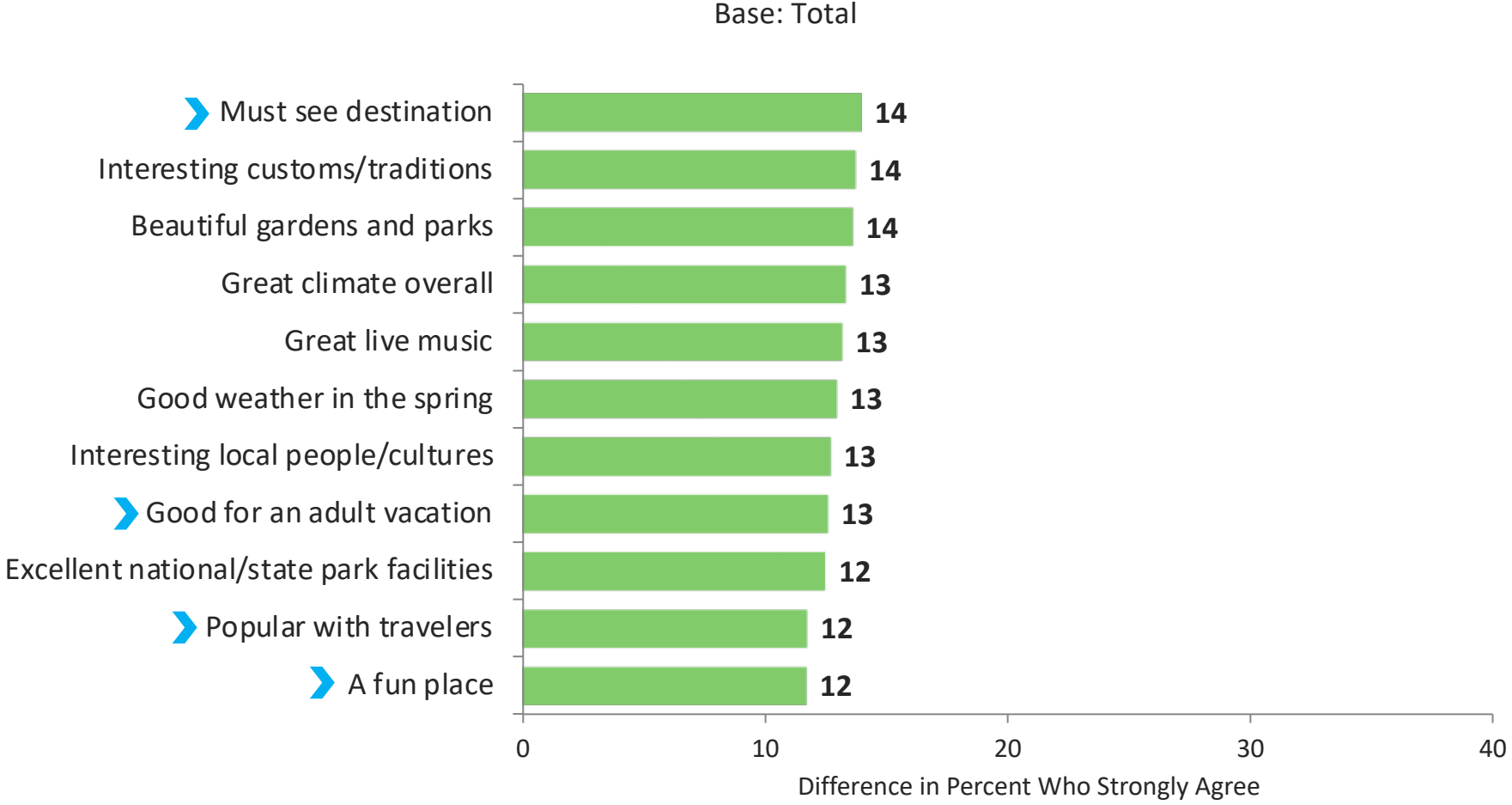
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana



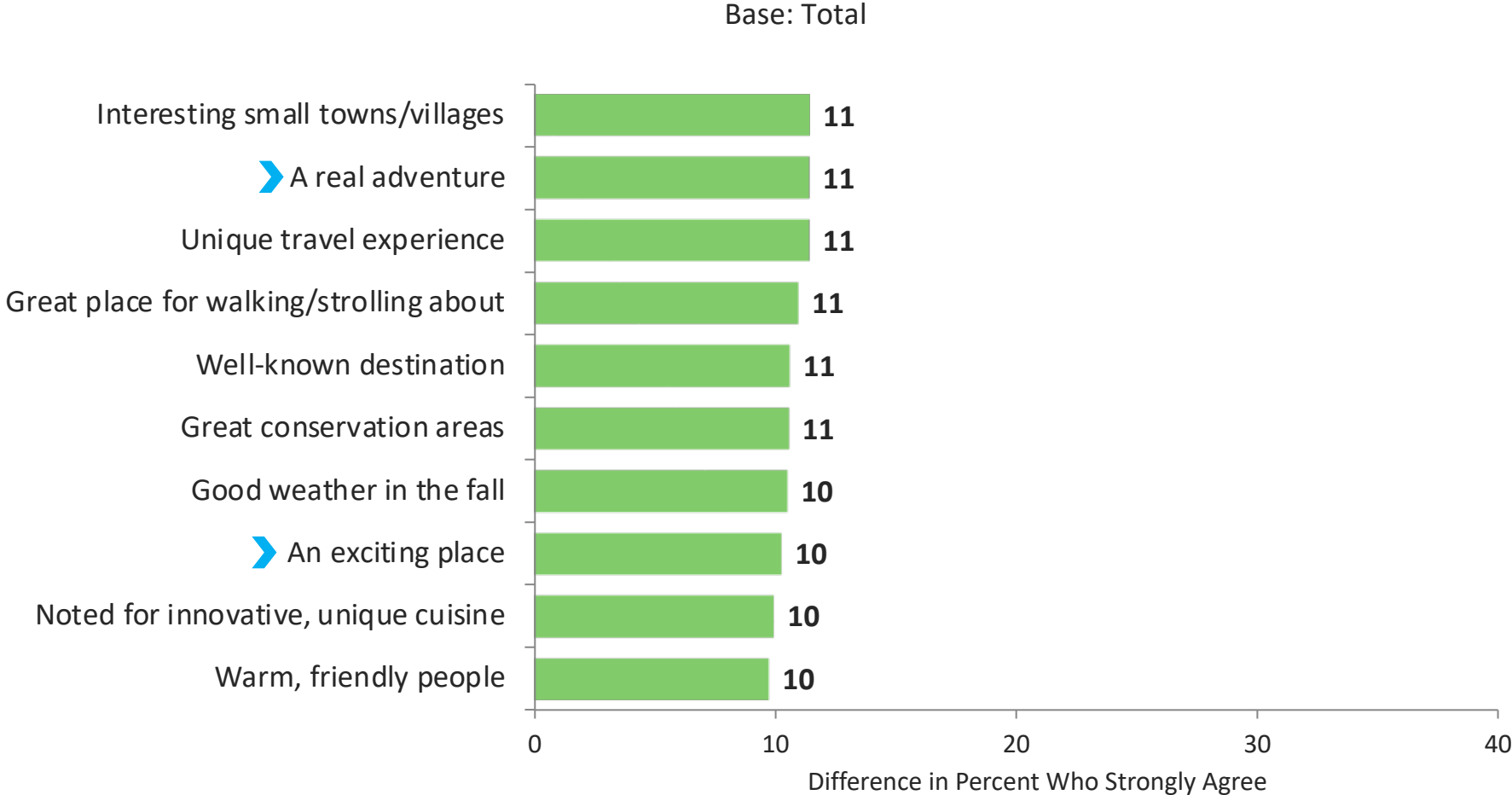
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



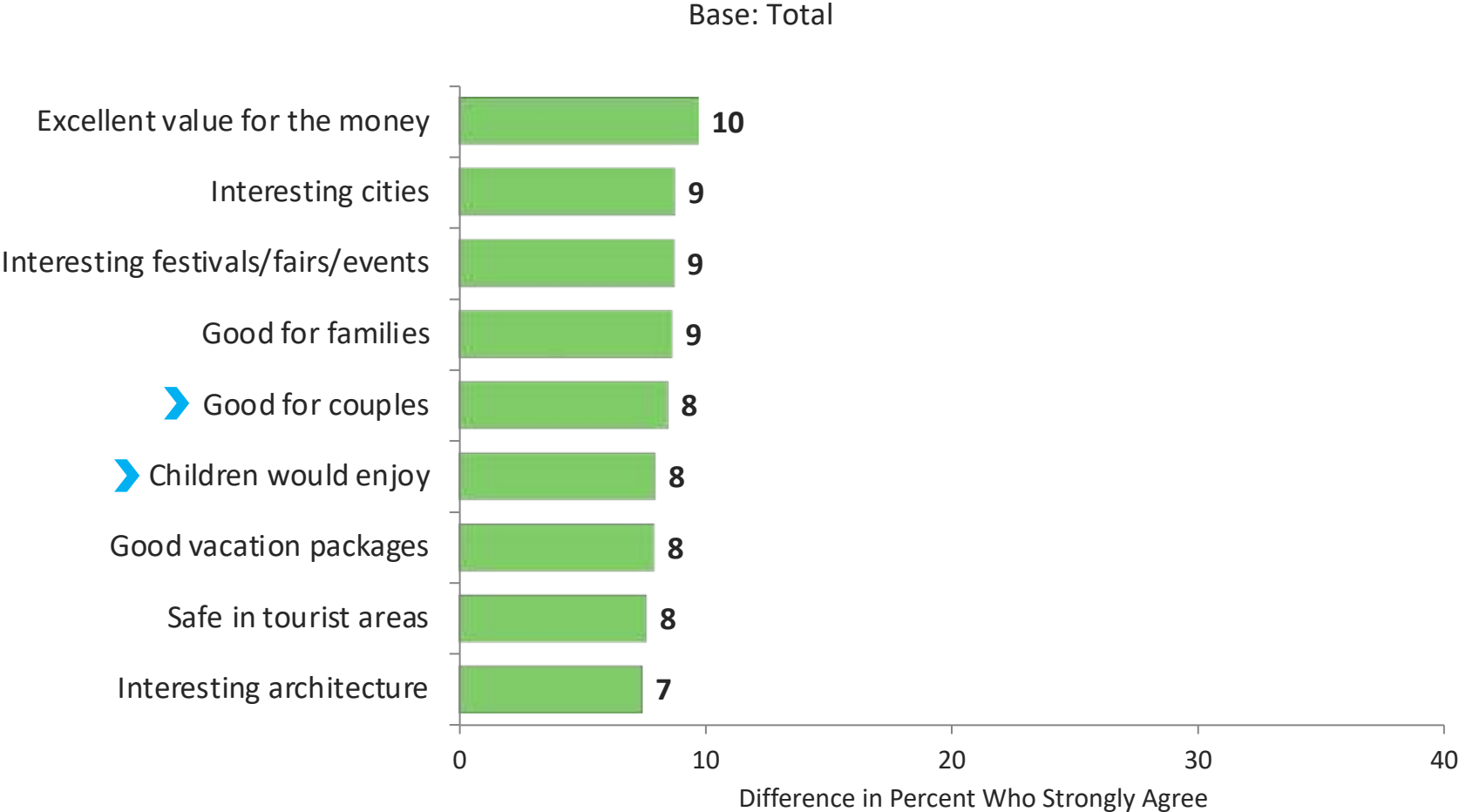
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



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

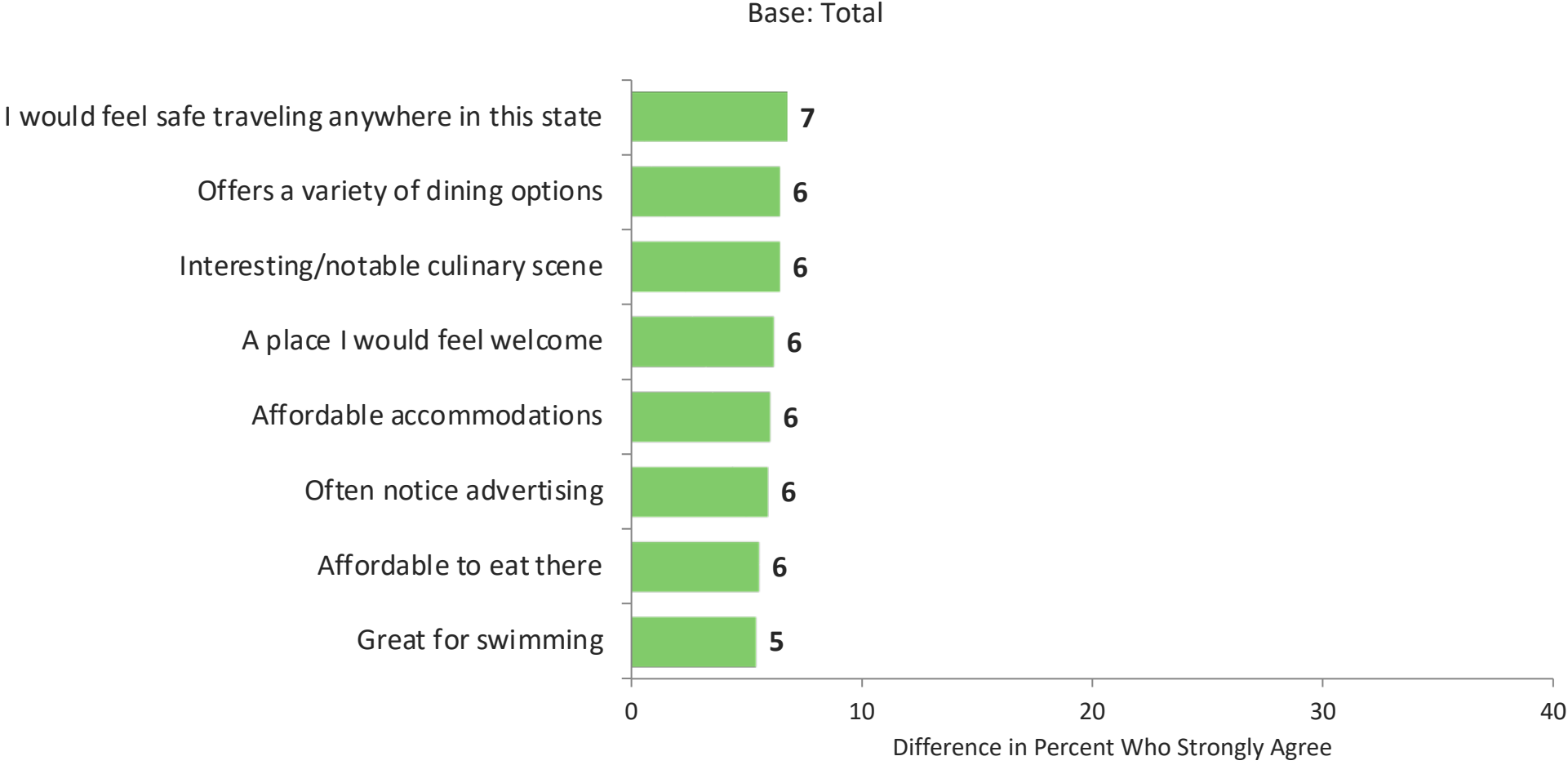
# Kentucky's Image Strengths vs. Indiana (Cont'd)



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



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

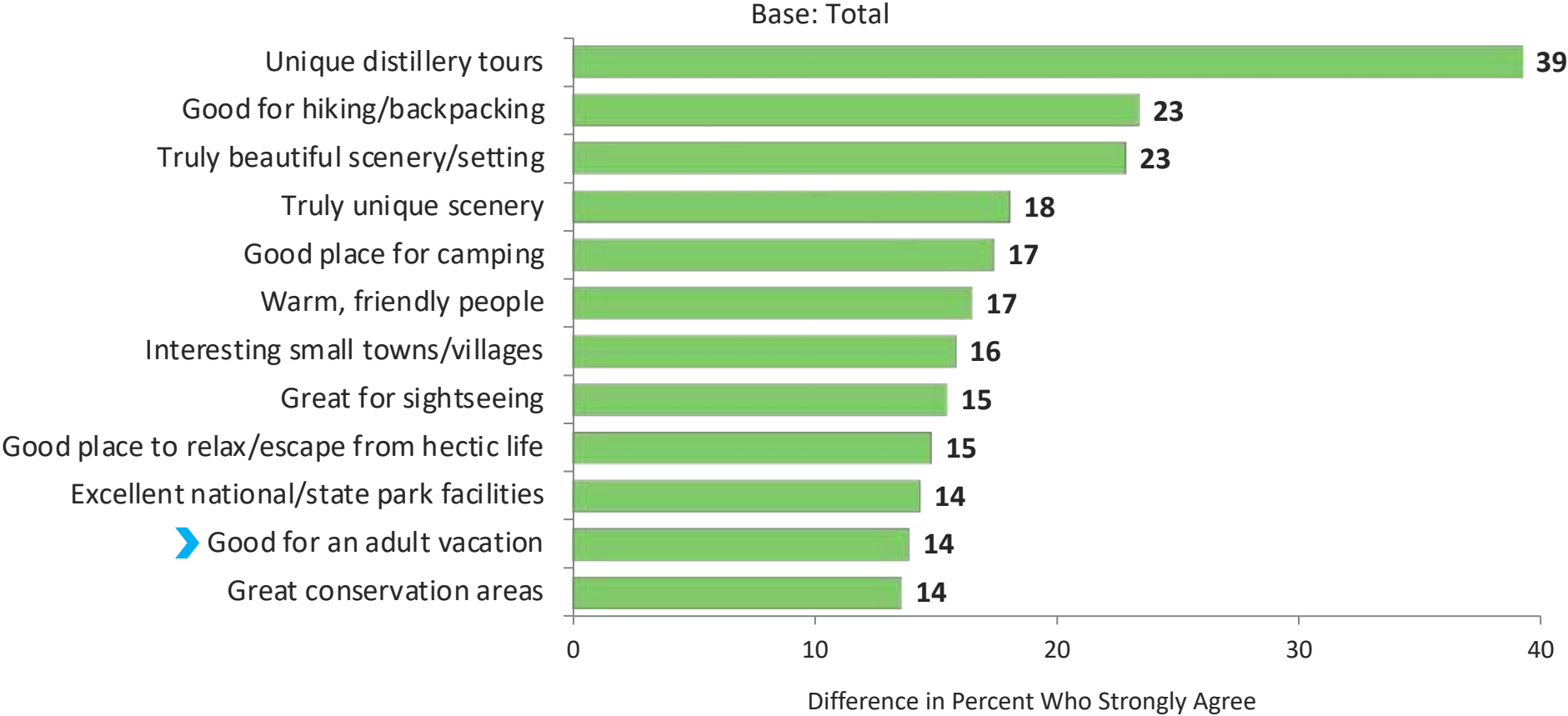


# Kentucky's Image Weaknesses vs. Indiana

Base: Total

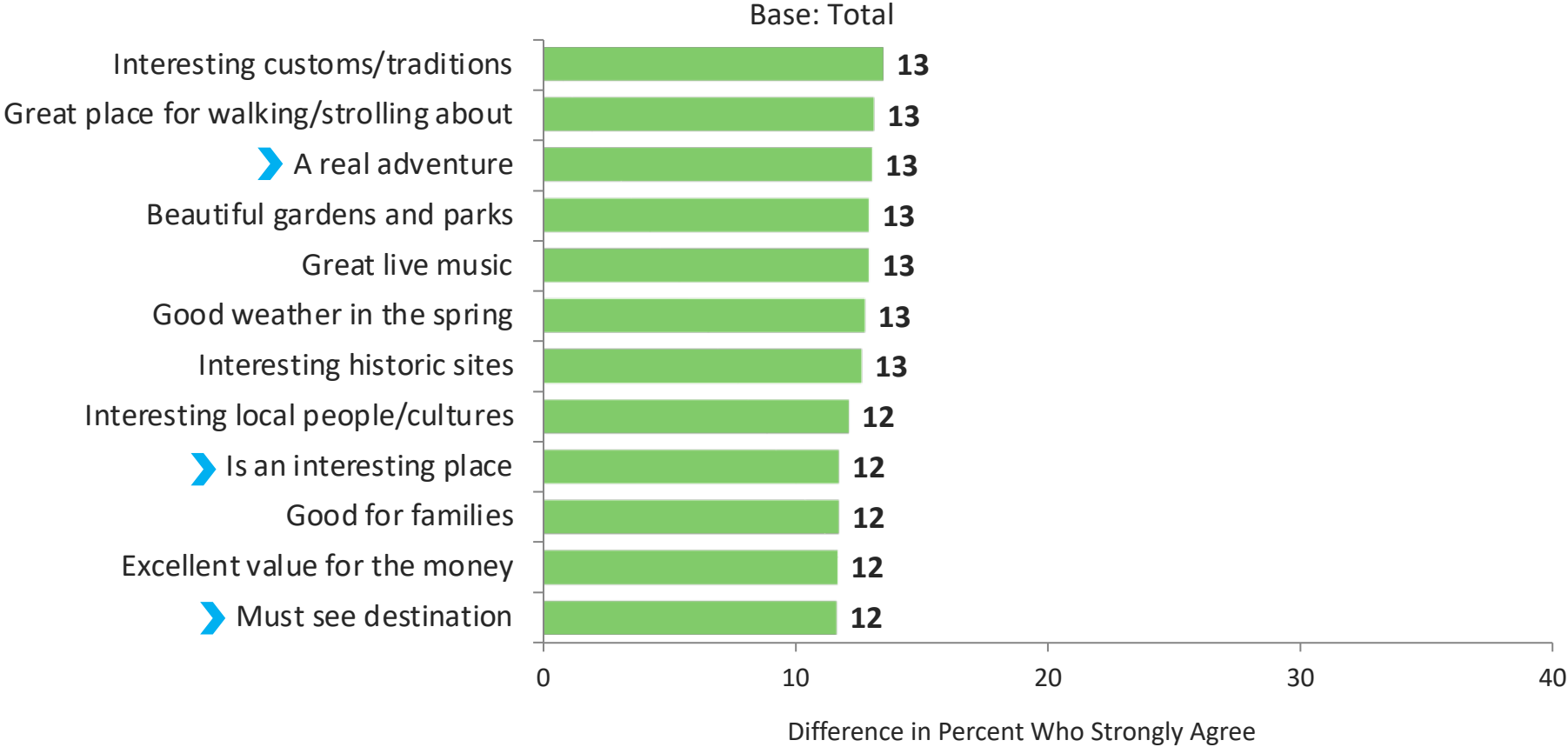
**THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE WEAKNESSES  
VS. INDIANA**

# Kentucky's Image Strengths vs. Ohio



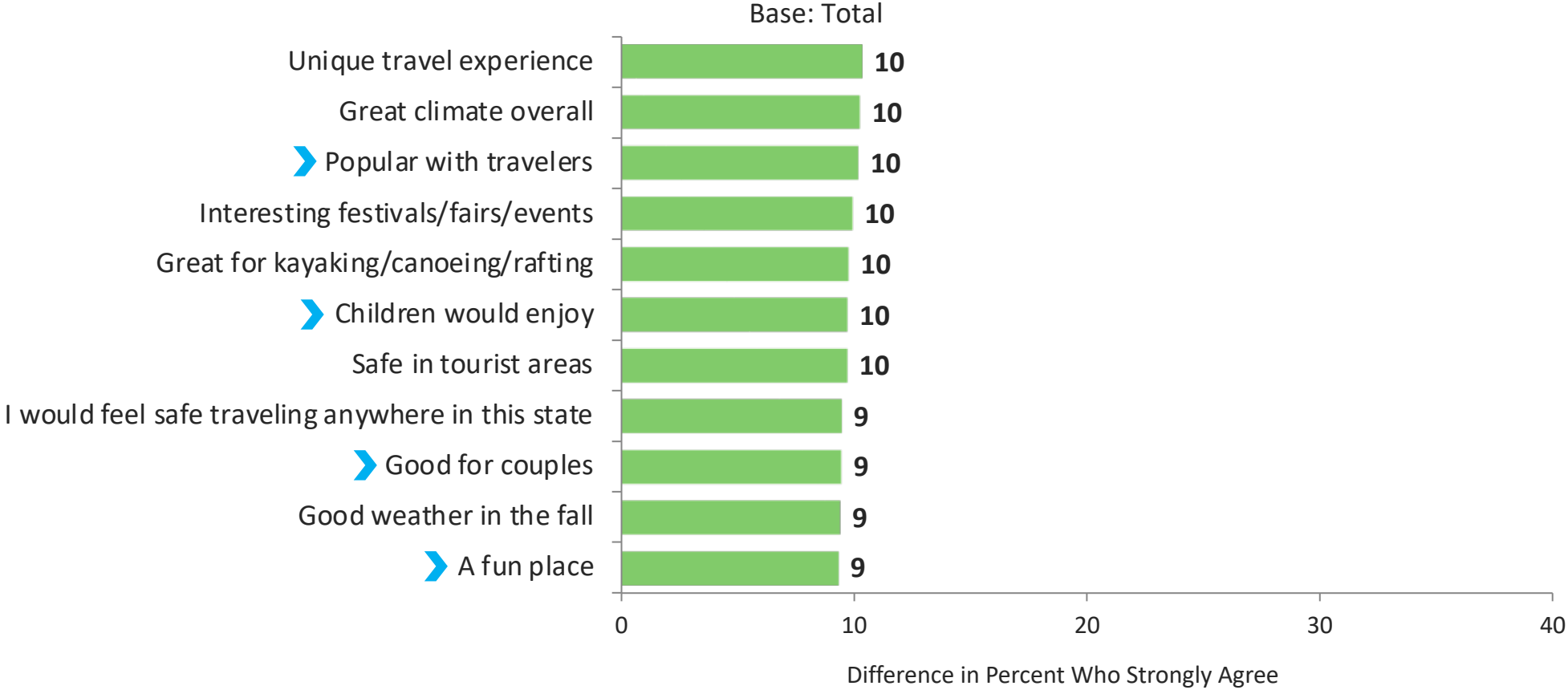
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



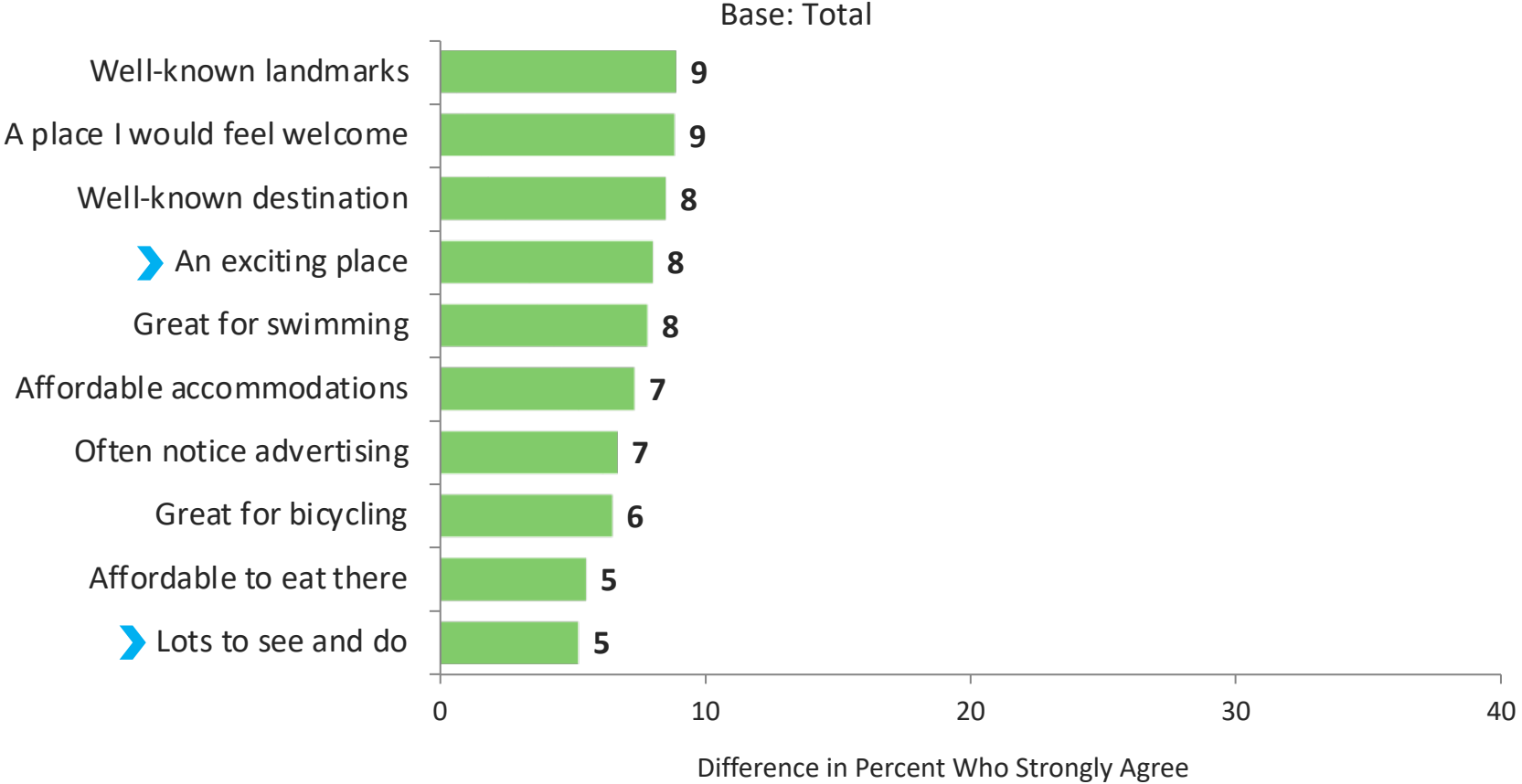
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



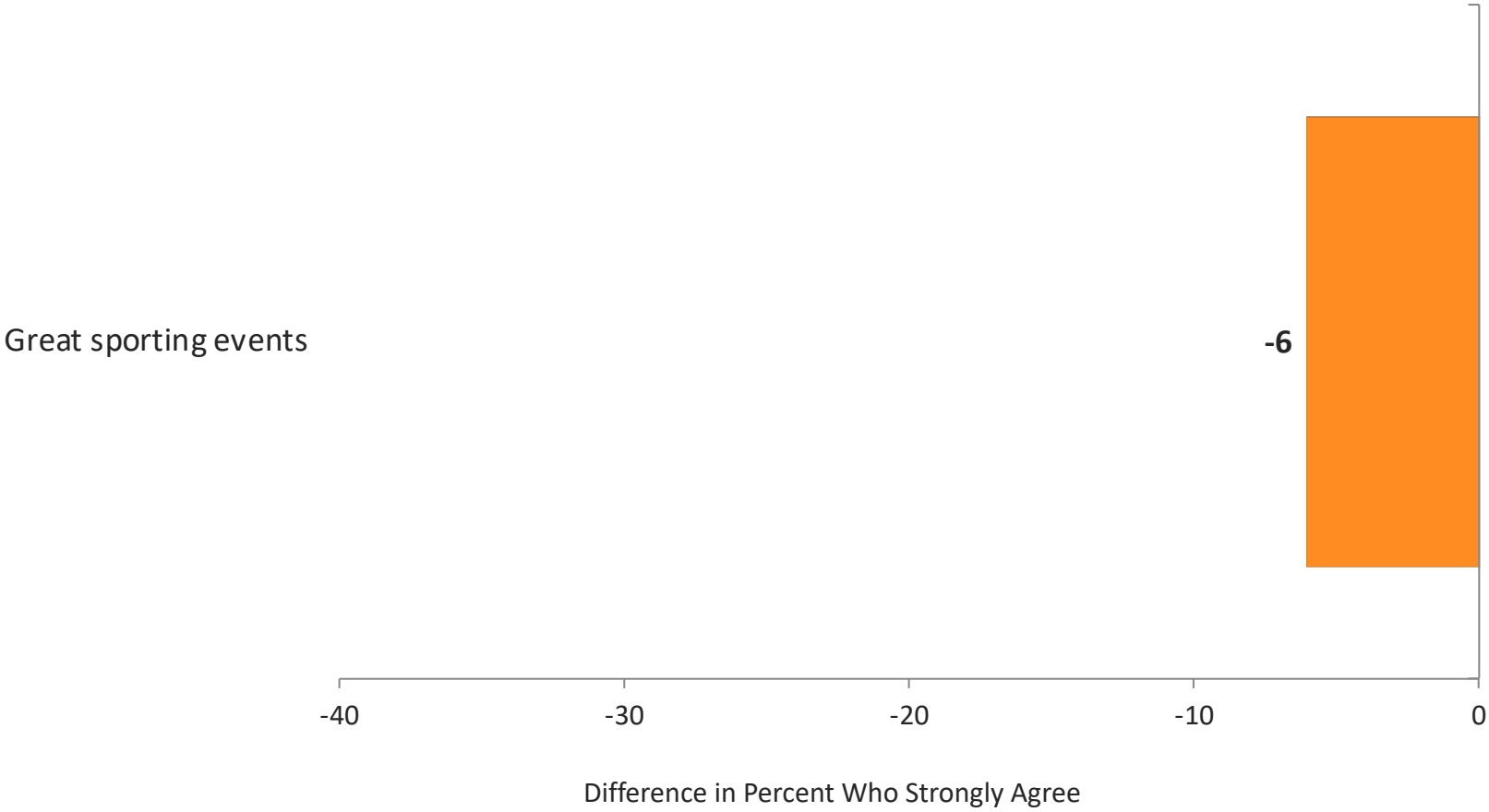
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

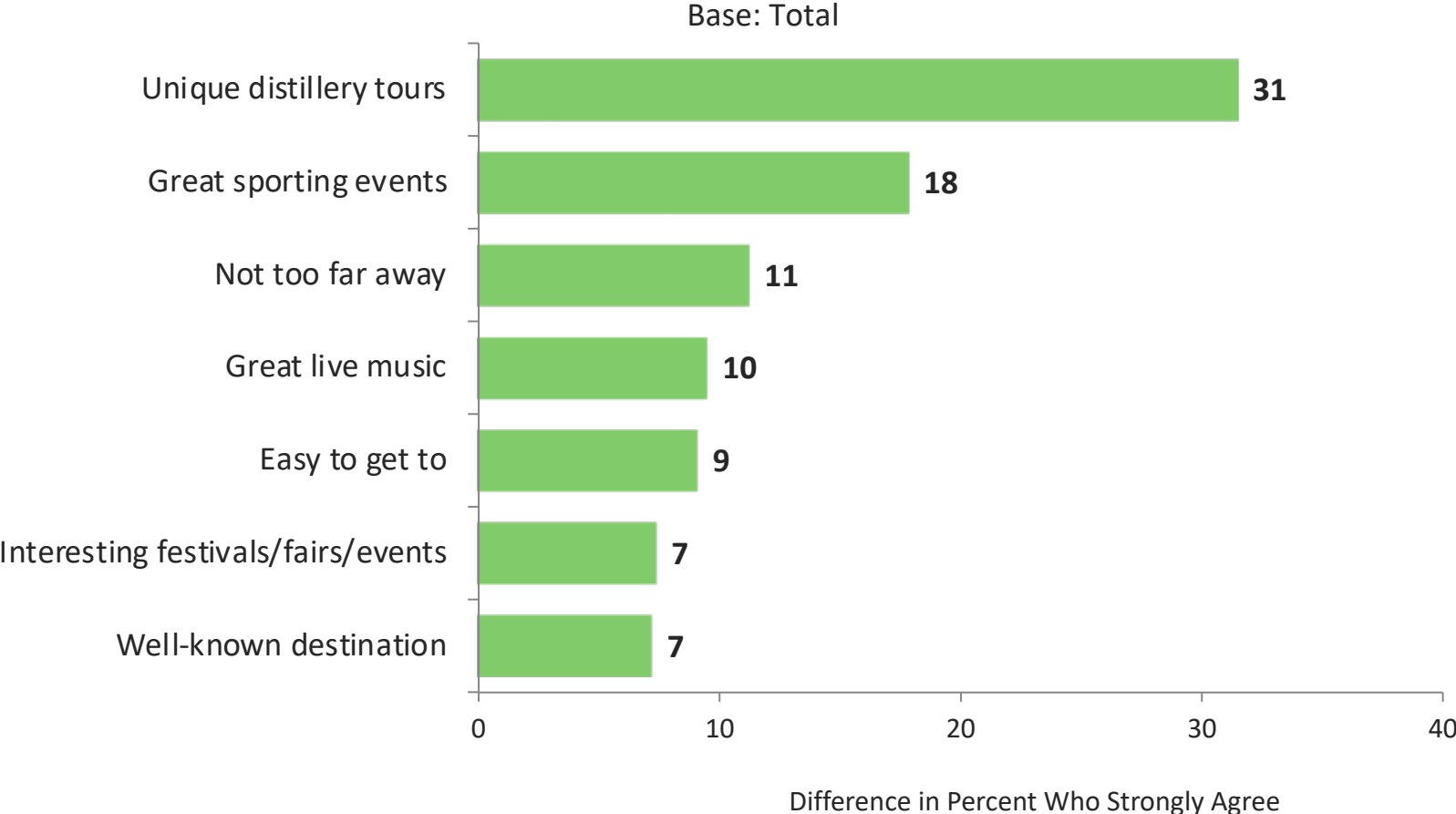


\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. Ohio

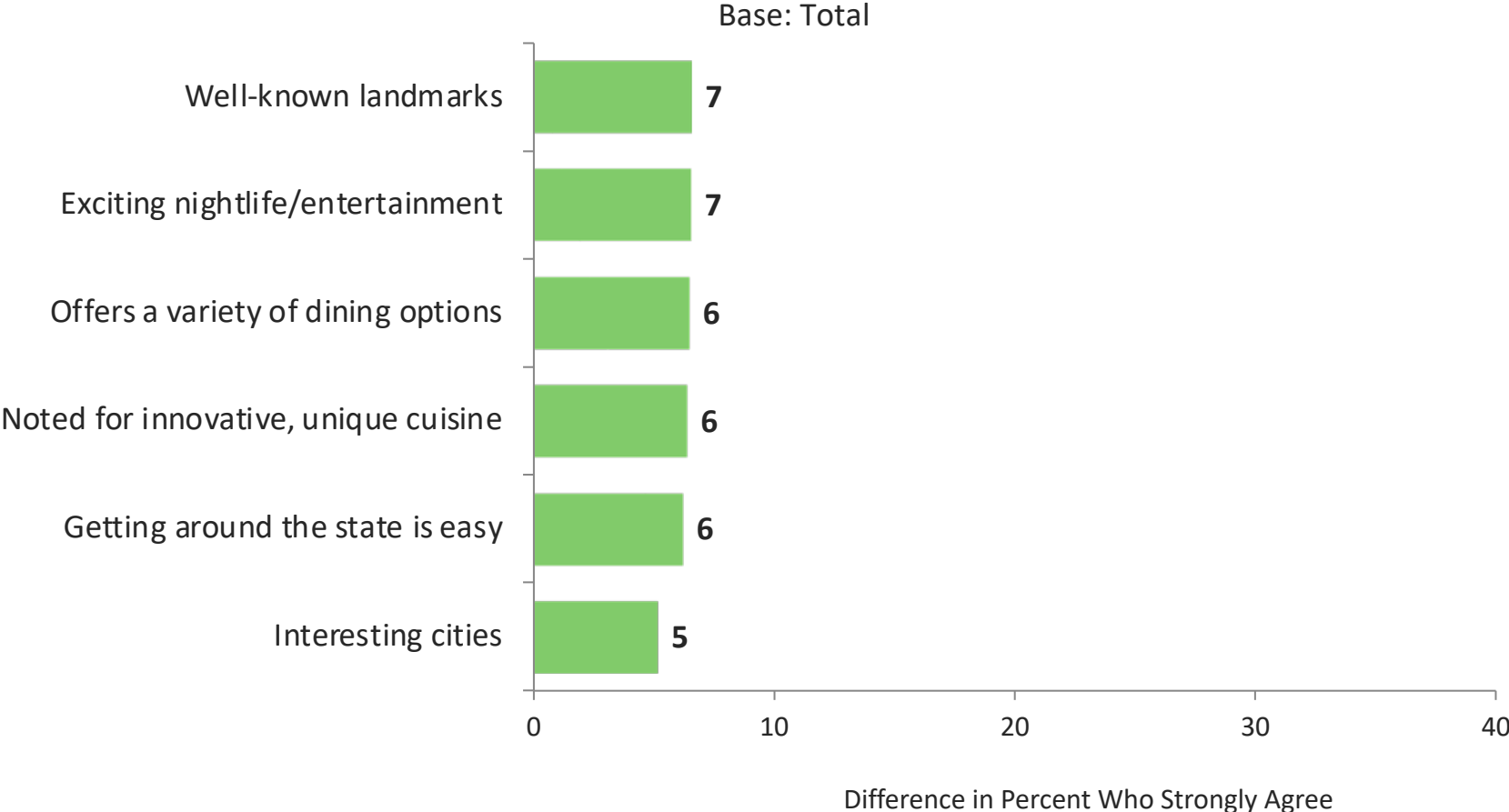


# Kentucky's Image Strengths vs. West Virginia

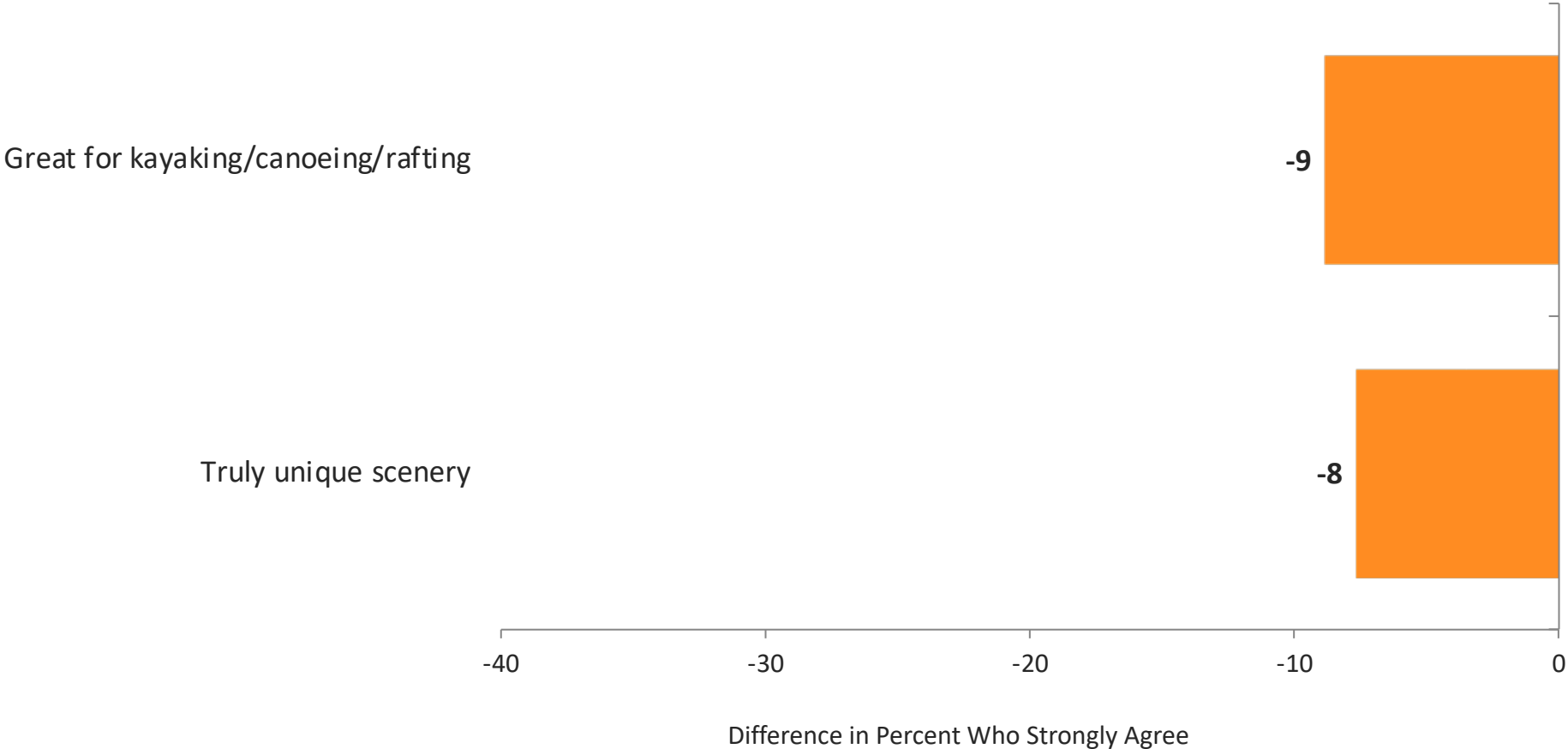




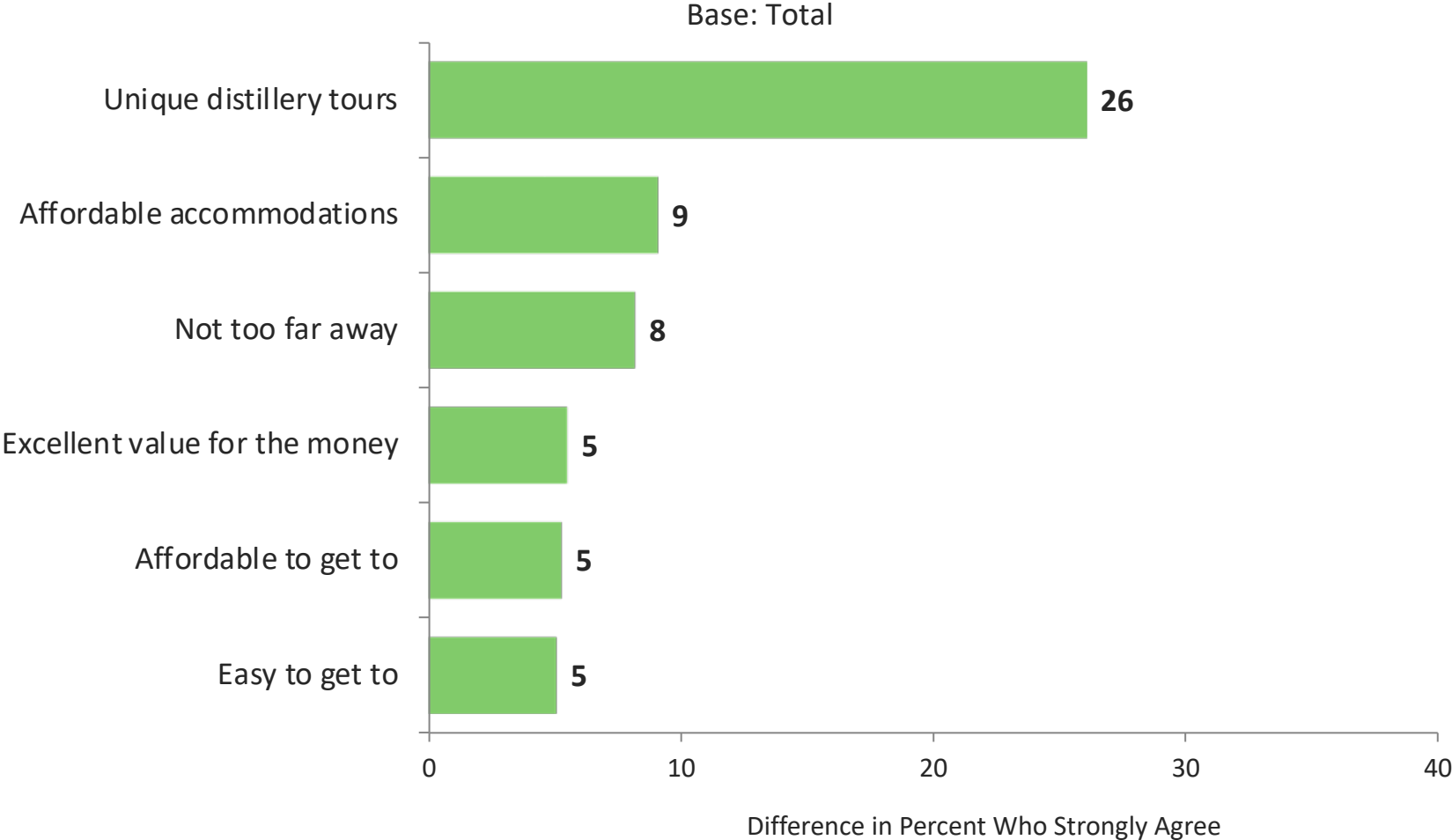
# Kentucky's Image Strengths vs. West Virginia (Cont'd)



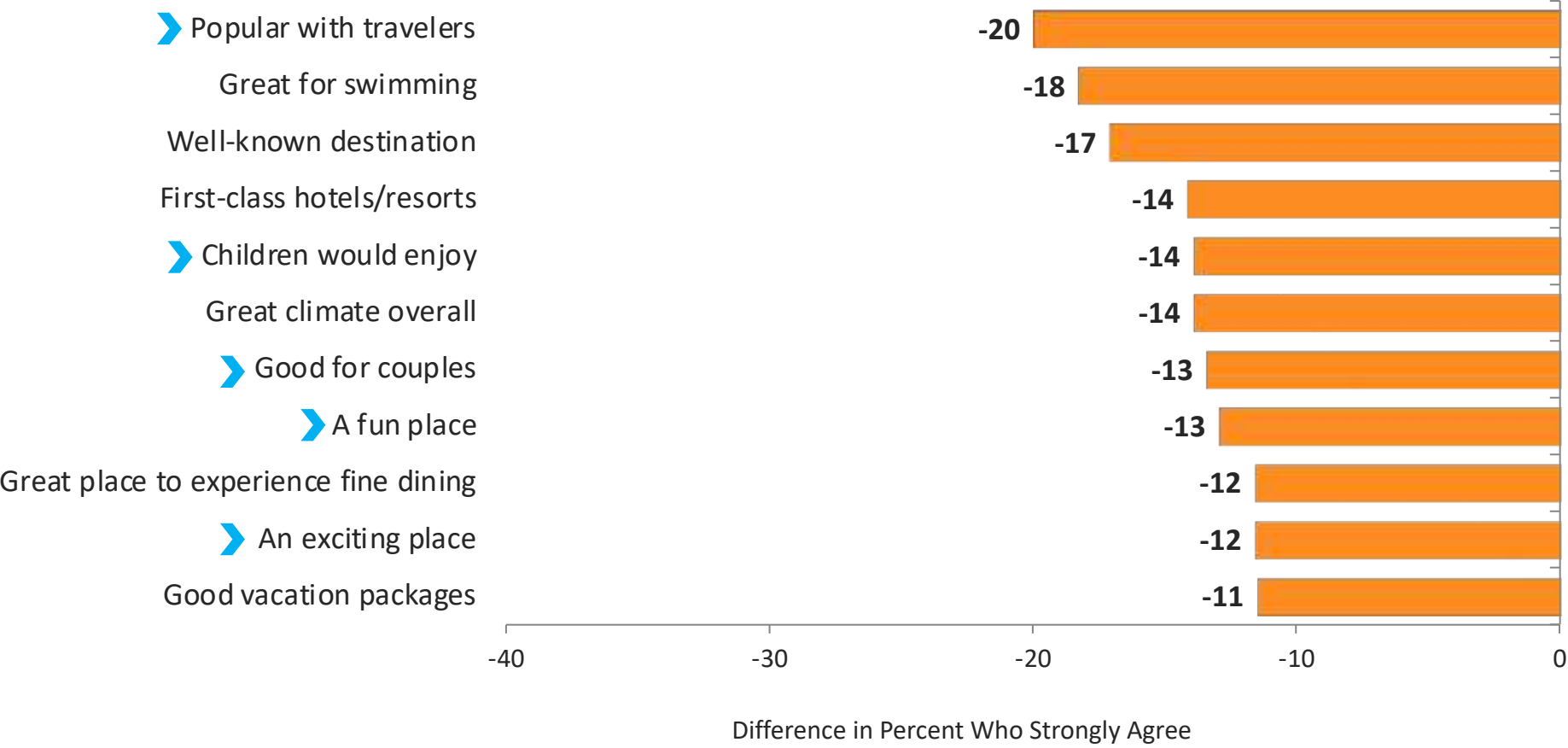
# Kentucky's Image Weaknesses vs. West Virginia



# Kentucky's Image Strengths vs. North Carolina

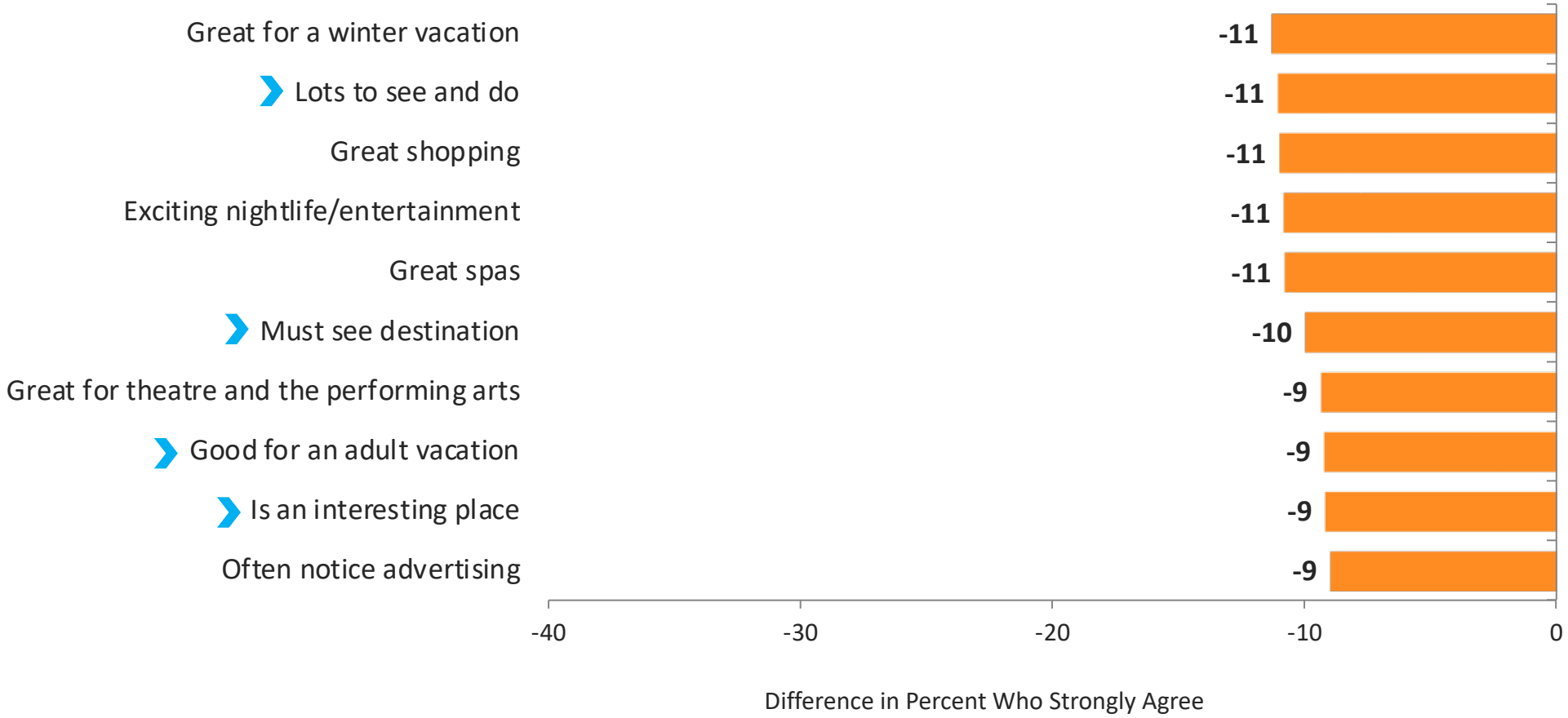


# Kentucky's Image Weaknesses vs. North Carolina



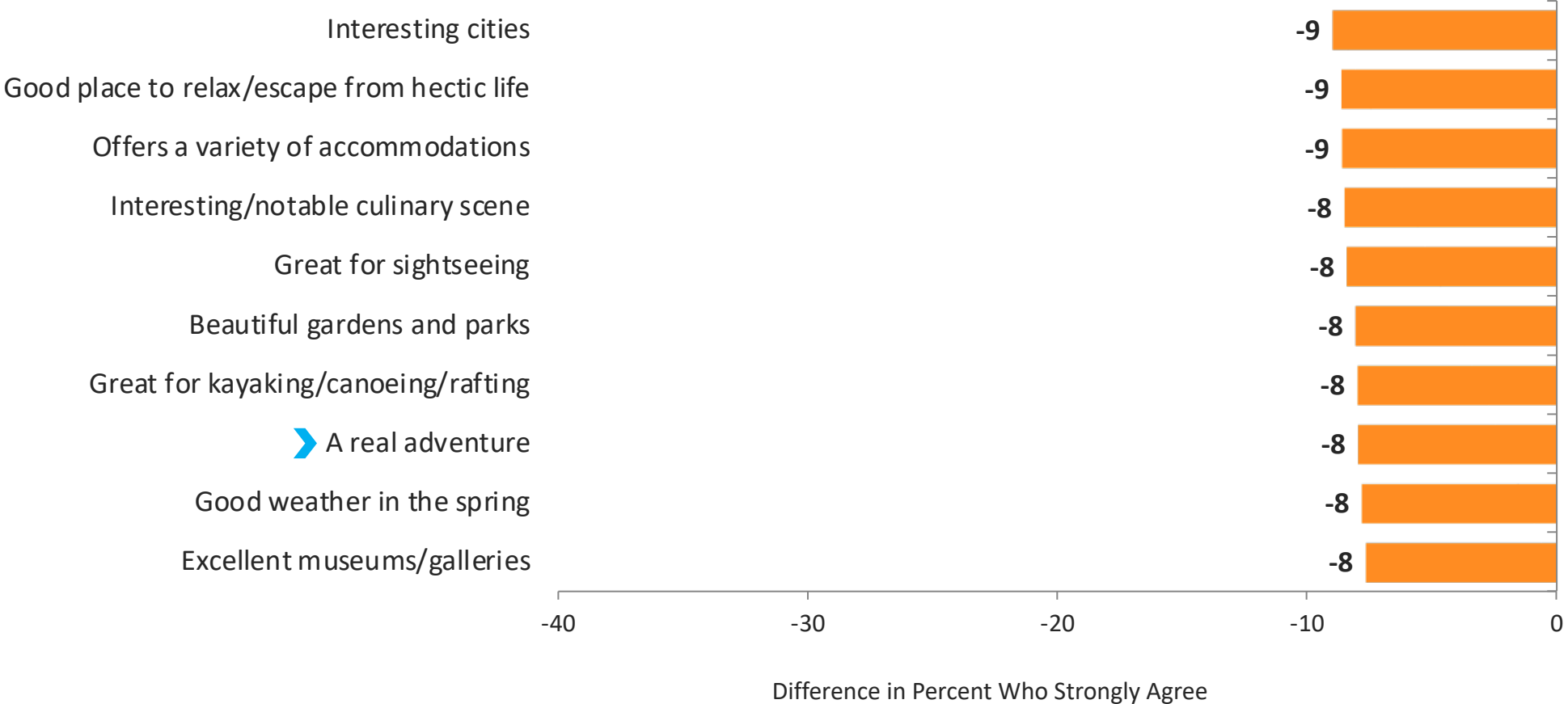
\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



\* 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)



\* 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)

