



Kentucky 2024

Existing Markets Advertising ROI

Table of Contents

3	About Longwoods International
4	Research Overview: Advertising Return on Investment
5	Survey Methodology
6	Key Findings
9	Advertising Awareness
13	Return On Investment
20	Destination Visitation and Interest
24	Brand Health Overview
30	Advertising Impact on Destination Image
37	Product Delivery
43	Hot Buttons: Impact of Awareness & Visitation
45	Destination Image vs. the Competition
75	"Halo Effect" on Economic Development
80	Appendix: Destination Image Strengths and Weaknesses vs. Individual Competition

ABOUT LONGWOODS INTERNATIONAL

Established in 1978 as a market research consultancy, Longwoods International is a premier market research firm that is a respected leader within the travel and tourism industry. With headquarters in Columbus, Ohio and Toronto, Ontario, and with offices in Idaho, Illinois, Indiana, Michigan, Existing York, Tennessee, and Wisconsin, Longwoods **conducts strategic market research** for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods is known for a multitude of destination marketing services, most notably:

➔ **Overnight and day visitor profiles**, including visitor volumes and expenditures, through **Travel USA®**, the largest American domestic travel study, begun in 1990.

➔ **Destination advertising awareness, return-on-investment of advertising campaigns,** and **measuring the impact of advertising on a destination's image** across a wide range of leisure travel attributes.

➔ **"Halo Effect"** of tourism advertising on a destination's image for broader economic development objectives.

➔ **Resident sentiment research**, which investigates both practical and emerging concerns among residents in a destination regarding tourism, including topics such as economic development, perceived environmental impacts, overtourism, and residents' quality of life.

➔ **Custom qualitative and quantitative research**

Soundly grounded in scientific principles, our research methodologies have been **peer-reviewed**, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists. Our **scientific integrity has been recognized** with numerous Best Practice awards, as well as invitations for speaking engagements across North America.

With the acquisition of Clarity of Place, Longwoods now also offers cutting-edge approaches to help destinations **evaluate the alignment of the needs of visitors with those of residents**, the community capacity for destination growth, the health of their brand, and their ability to remain competitive.

OVERVIEW: Advertising Return on Investment



The campaign consisted of both traditional and online media including:

- Digital Ads**
- Social Ads**
- Print Ads**
- Video Ads**
- Out-of-Home Ads**
- Audio Ads**

PROJECT OVERVIEW

Longwoods was engaged to conduct a program of research designed to measure the ROI and advertising awareness of the Kentucky Tourism advertising campaigns.

A benchmark study was conducted after the conclusion of the advertising period to **measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit and destination image, and measure short-term conversion that occurred during and shortly after the campaign period.**

The estimates of the campaign's impacts on visits to 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.

Survey fielded in **14 key Existing Markets** and received **1000 qualified respondents**.

Qualified respondents are **adult travelers*** and members of major online consumer research panel.

Sample drawn to be **representative and proportionate to sample DMAs, age, and gender**.

Data were weighted on **key demographic variables** (geography, age, sex, household income, household size) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific markets.

Fieldwork was conducted in February – March 2025. Median survey length was 18 minutes. For a sample of this size, **the confidence level is + / -3, 19 times out of 20**

Sample Markets + Respondent Distribution Existing Markets

Atlanta (185)
Bowling Green (15)
Charleston-Huntington (25)
Chicago (240)
Cincinnati (65)
Columbus, OH (70)
Evansville (20)
Indianapolis (80)
Knoxville (35)
Lexington (35)
Louisville (45)
Nashville (80)
Paducah-Cape Girardeau-Harrisburg (25)
Saint Louis (80)

ADVERTISING

About two-thirds (66%) travelers in Kentucky Tourism's Existing advertising markets recalled seeing at least one Kentucky advertisement during the Spring - Fall 2024 campaign. Over half (52%) remembered at least one digital ad, followed by video (48%), print (45%), social (38%), audio (34%), and OOH (29%).

14% of respondents in Existing markets are aware of the Kentucky Tourism website. Of these respondents, over six in ten (64%) found the Tourism Kentucky website very useful.

Four in ten (39%) used an internet search to obtain information about traveling to Kentucky; about two in ten respondents visited KentuckyTourism.com (20%) and used social media (22%).

RETURN ON INVESTMENT

For Existing markets, the 2024 campaign produced an additional 2.3 million trips to Kentucky that otherwise would not have materialized in the absence of this advertising.

Using Travel USA® estimates of average visitor expenditures, Longwoods estimate that these incremental Kentucky visitors from Existing markets spent \$345 million while in Kentucky.

When related to Existing markets advertising costs of \$7 million, this translates into a return on investment of \$49 in visitor spending for each ad dollar spent.

Those incremental expenditures yielded the following in taxes:

\$26.7 million in state and local taxes for Existing advertising markets. Return on investment of \$4 in taxes for each ad dollar spent in Existing advertising markets.

Kentucky Tourism spent an average of \$3.08 in advertising for every incremental trip earned from Existing advertising markets during this campaign.

KEY FINDINGS: OVERALL BRAND HEALTH

BRAND HEALTH

For a destination in Kentucky Existing markets to get on travelers' consideration list, it must, first and foremost, be perceived to be appealing to adults, exciting, offer a family atmosphere, and good sightseeing opportunities.

This campaign had a strong positive impact on Existing advertising market travelers' perceptions of Kentucky. Existing advertising market residents exposed to the campaign gave the destination higher rating scores than those unfamiliar with the campaign for all Hot Buttons. For the remaining destination attributes & perceptions, we find that the campaign did an exceptional job of improving people's perceptions of Kentucky for every image dimension evaluated.

Comparing the image ratings of people who have never visited Kentucky versus that of those who have visited in the past two years, we have a measure of "product delivery," the relative satisfaction of the two groups. In Existing markets, more recent Kentucky visitors than non-visitors rated the destination favorably in all 10 Hot Button attributes.

Relative to the other destinations in the competitive set for this study, Kentucky places in the middle for its overall image among Existing advertising market travelers. Across the Existing advertising markets surveyed, almost half (47%) rated Kentucky very favorably as a destination they "would really enjoy visiting." Kentucky ranks in third place behind North Carolina (66%), Tennessee (58%) & Georgia (57%), and ahead of West Virginia (43%), Ohio (36%) and Indiana (34%).

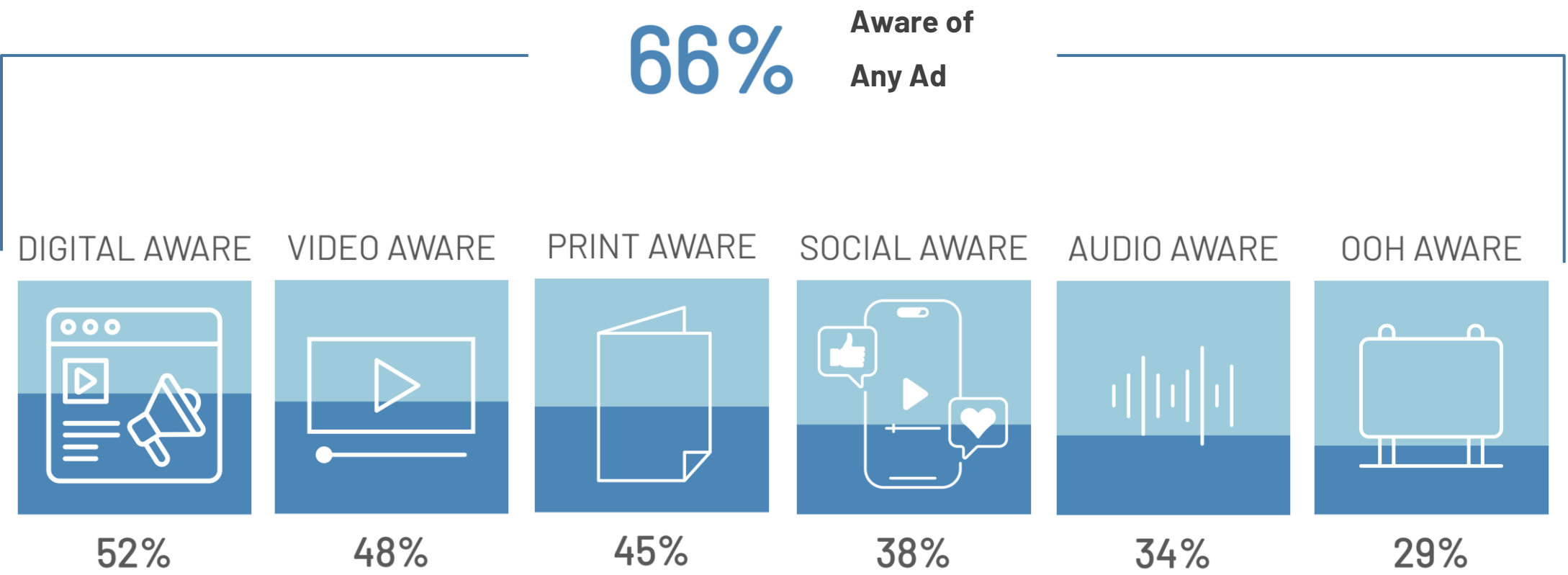
In Existing markets, amongst the competitive destinations included in this study, Kentucky ranks more favorably as a destination that offers excellent value for the money.



[ADVERTISING AWARENESS]

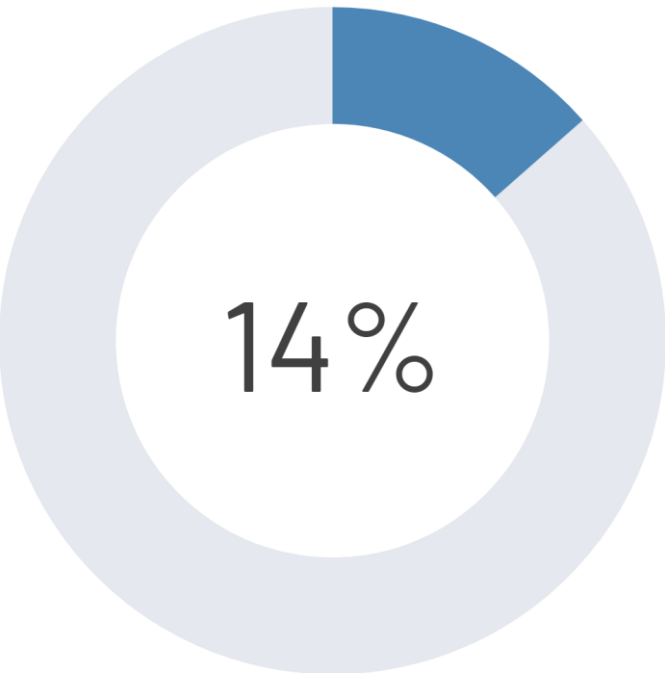


AWARENESS* OF THE AD CAMPAIGN

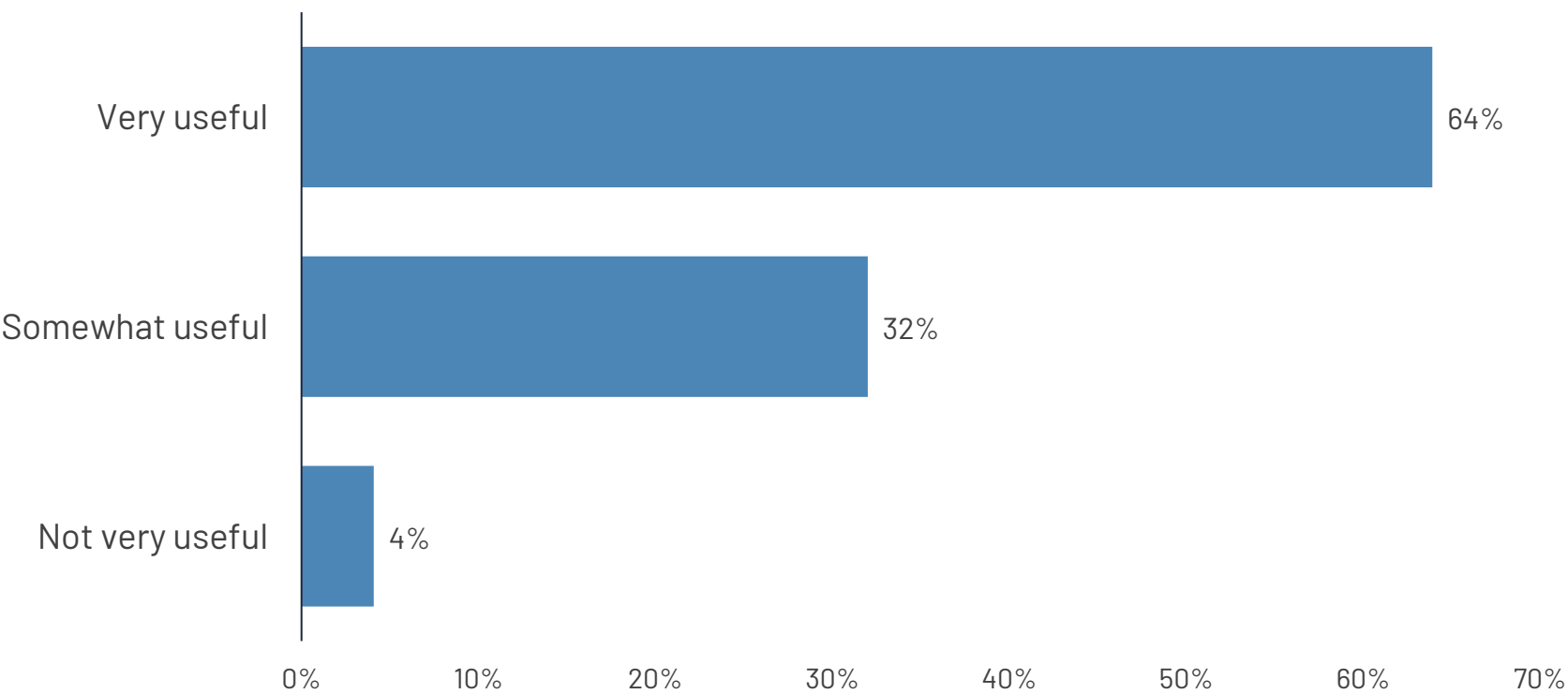


*Saw at least one ad and based on markets where shown
Base: Existing Markets

Awareness of Website

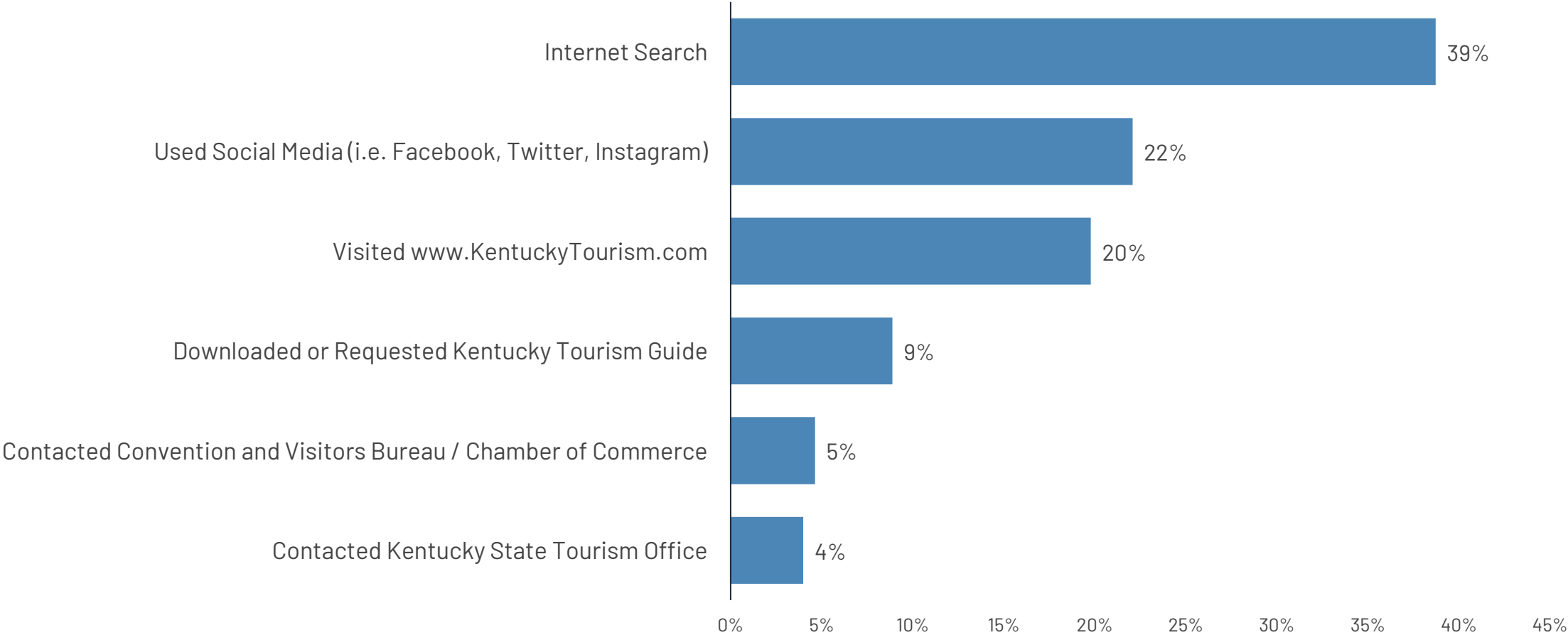


How useful was the Tourism Kentucky website?*



*Caution Low Sample
Base: Existing Markets

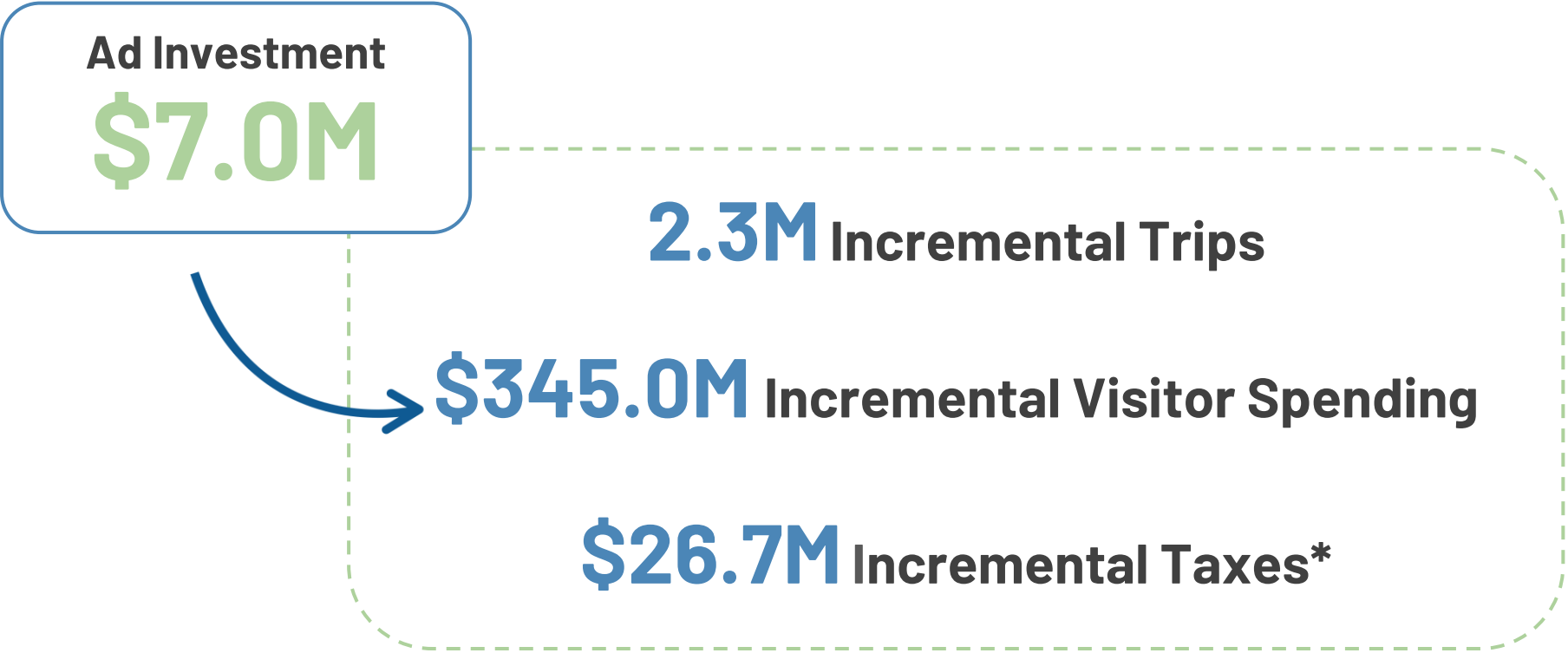
ACTIONS TAKEN TO OBTAIN INFORMATION ABOUT TRAVELING TO KENTUCKY





[RETURN ON INVESTMENT]





*Effective Tax Rate 7.7% from Tourism Economics
Base: Existing Markets

RETURN ON INVESTMENT: 2024

	Existing Markets	New Markets	Total
Ad Investment	\$7.0M	\$3.8M	\$10.8M
Incremental Trips	2.3M	0.908M	3.2M
Incremental Visitor Spending	\$345.0M	\$184.7M	\$529.7M
Incremental State + Local Taxes	\$26.7M	\$14.3M	\$40.9M

AD INVESTMENT CONVERSION

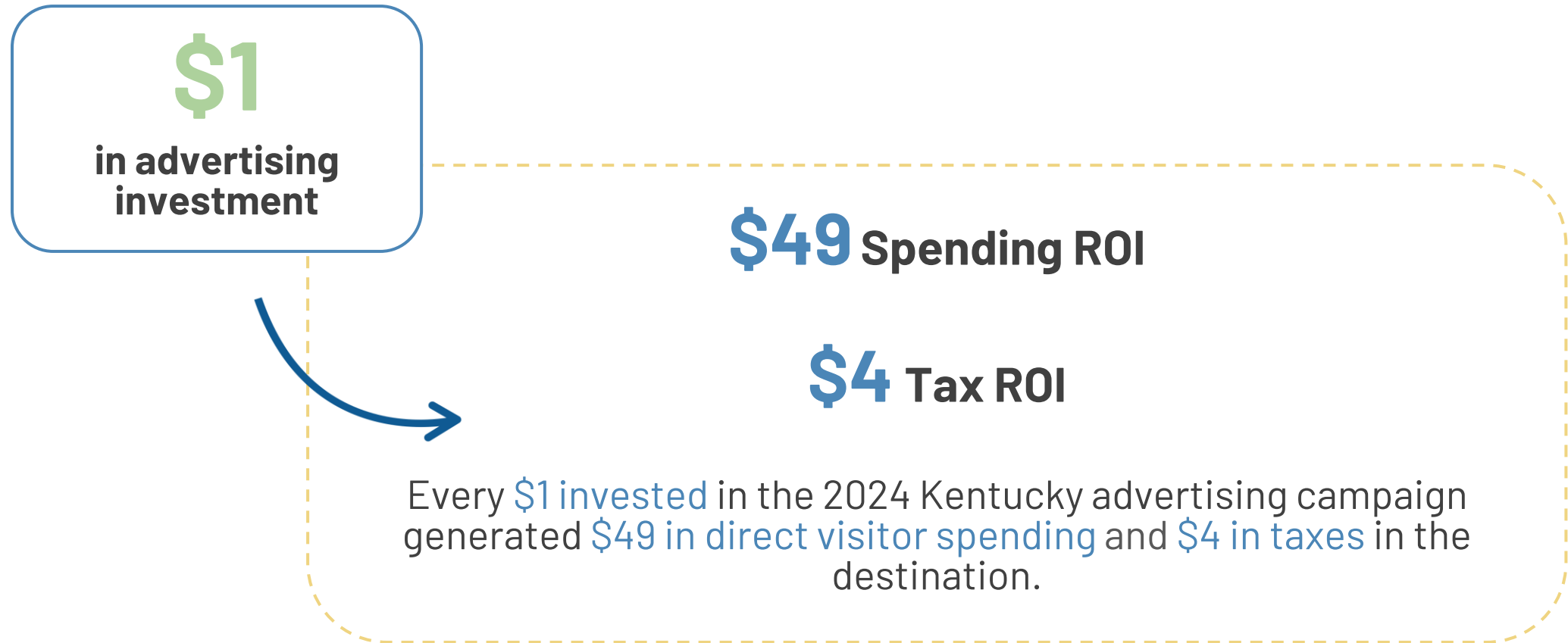
Kentucky Tourism spent an average of \$3.08 in advertising for every incremental trip earned from Existing advertising markets during this campaign.

CAMPAIGN EFFICIENCY

Ad \$'s Per Trip: **\$3.08**

Trips Per Ad \$: **0.33**

THE BOTTOM LINE: 2024



	Existing Markets	New Markets	Total
Spending ROI	\$49	\$49	\$49
Tax ROI	\$3.82	\$3.76	\$3.80



DESTINATION VISITATION AND INTEREST



PAST VISITATION



58% of travelers within Kentucky’s Existing markets have visited the state during their lifetime. Among those, 56% have visited during the past 2 years.

	Ever	Visited Past 2 Year*
Indiana	52%	63%
Tennessee	70%	62%
Ohio	47%	56%
Georgia	52%	56%
Kentucky	58%	56%
North Carolina	50%	45%
West Virginia	26%	35%

*Among those who have ever visited respective destination
Base: Existing Markets

INTENT TO VISIT IN NEXT 12 MONTHS

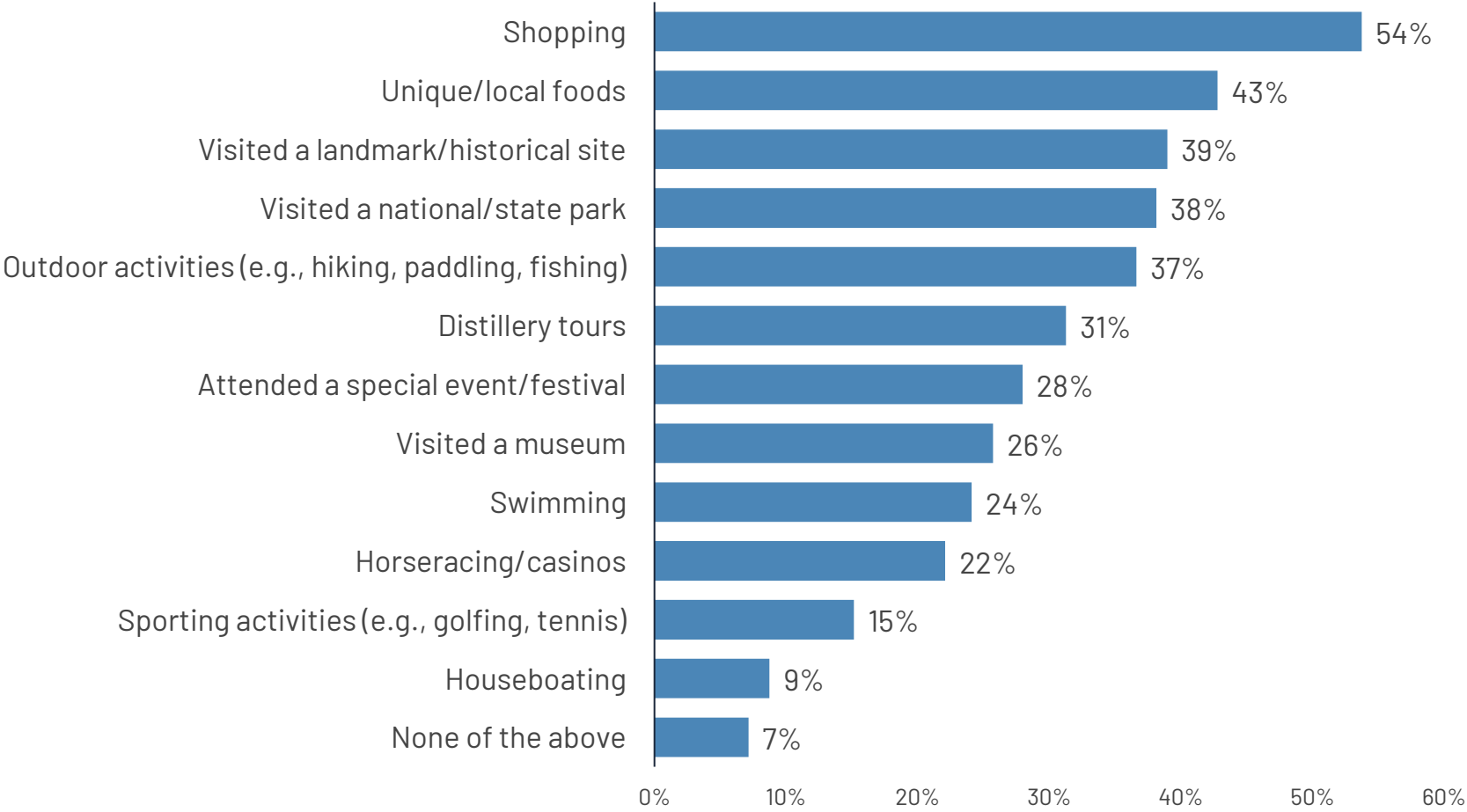


48% of respondents intend to visit Kentucky during the next 12 months.

	Probably or Definitely Will Visit Destination in Next 12 Months*
Tennessee	56%
Kentucky	48%
North Carolina	40%
Georgia	40%
Indiana	35%
Ohio	34%
West Virginia	29%

*On a day or overnight trip
Base: Existing Markets

ACTIVITIES PARTICIPATED ON OVERNIGHT TRIP TO KENTUCKY





[BRAND HEALTH OVERVIEW]



WHAT IS A TRAVEL MOTIVATOR?



Respondents evaluated the image of Kentucky and six other destinations on an overall basis and on a series of detailed image attributes.

Similar image attributes are grouped together to form **Travel Motivators**.

Travel motivators are ranked in descending order based on the average correlation* value for their respective individual attributes.

Travel Motivators in this Study

Adult Appeal

Exciting

Family Atmosphere

Sightseeing

Worry-Free

Unique

Popular

Entertainment

Luxurious

Sports and Recreation

Affordable

Climate

TRAVEL MOTIVATOR GROUPINGS

Adult Appeal

Good for an adult vacation
Good for couples

Exciting

A fun place
Must see destination
An exciting place
A real adventure

Family Atmosphere

A good place for families to visit

Sightseeing

Is an interesting place
Lots to see and do
Great for sightseeing
Interesting cities/small towns
Great place for walking/strolling about
Beautiful gardens and parks
Truly beautiful scenery/setting
Great shopping
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)

Worry-Free

A place I would feel welcome
Good place to relax/escape from hectic life
Warm, friendly people
Getting around the state is easy

Unique

Unique travel experience
Interesting local people/cultures/customs/traditions
Interesting/notable culinary scene
Unique distillery tours

Popular

Popular with travelers
Well-known destination
Often notice advertising

Entertainment

Great live music
Interesting festivals/fairs/events
Exciting nightlife/entertainment
Great for theatre and the performing arts

Luxurious

Offers a variety of luxury hotels/resorts
Great luxury product offerings (e.g., spas, fine dining)

Sports and Recreation

Great for outdoor recreation (e.g., hiking, backpacking, camping)
Excellent national/state park facilities/conservation areas
Great for kayaking/canoeing/rafting
Great for professional or college sporting events

Affordable

Good vacation packages
Affordable accommodations and dining options
Not too far away or expensive to consider for a vacation

Climate

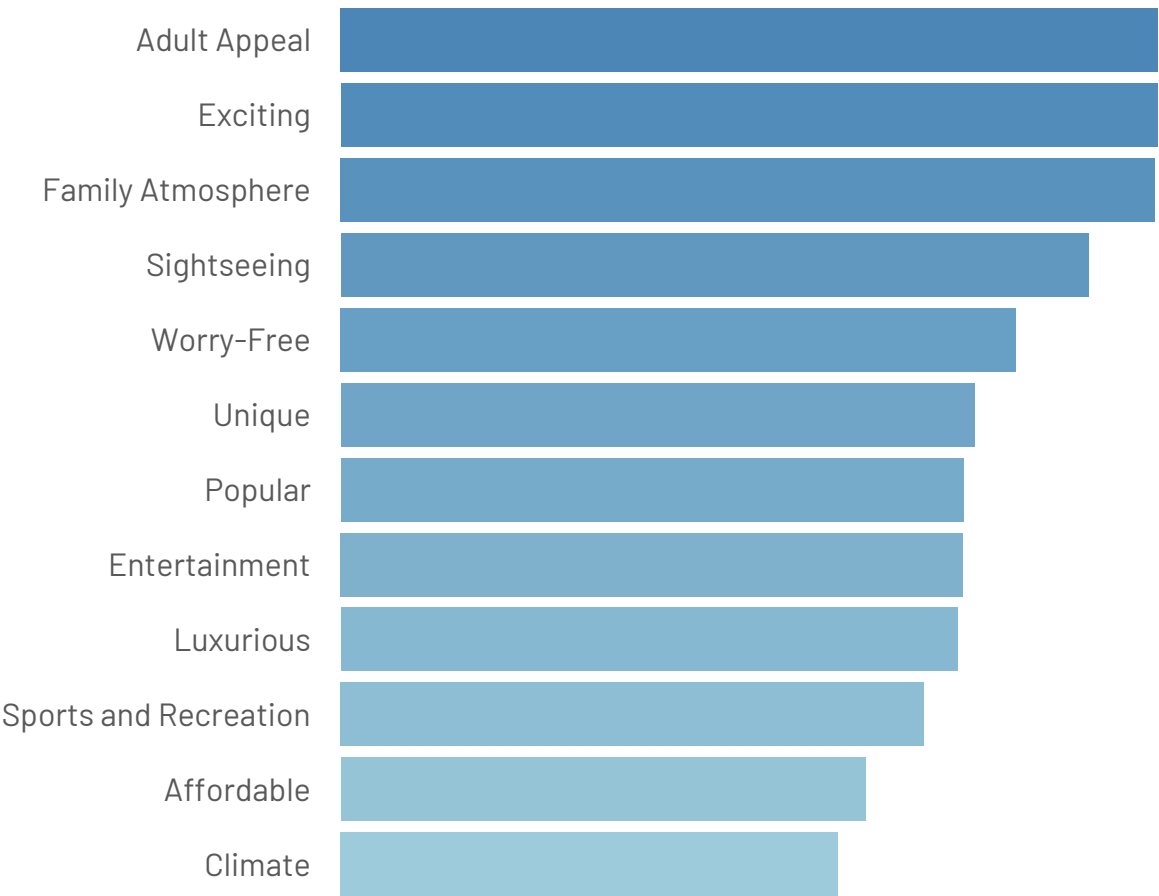
Great climate overall
Great for a warm weather vacation
Great for a cold weather vacation

Kentucky's Travel Motivators

For a destination in Kentucky Existing markets to get on travelers' consideration list, it must, first and foremost, be perceived to be appealing to adults, exciting, offer a family atmosphere, and good sightseeing opportunities.

Other factors of moderate importance include being a worry-free destination, uniqueness, popular amongst travelers, offer good entertainment options, and luxurious product offerings.

Lower priorities are sports and recreation, affordability, and climate.



Travel motivators are ranked in descending order based on the average correlation value for their respective individual attributes.



HOT BUTTONS

Is an interesting place

A fun place

Good for an adult vacation

Must see destination

Lots to see and do

A good place for families to visit

An exciting place

Great for sightseeing

Good vacation packages

Good for couples

Hot Buttons are the ten individual image attributes most closely tied to destination selection in Kentucky's Existing markets.*

Hot buttons are high on a traveler's 'wish list' when selecting a destination they'd really enjoy visiting.

*Based on strongest correlation value to "A place I'd really enjoy visiting"
Base: Existing Markets

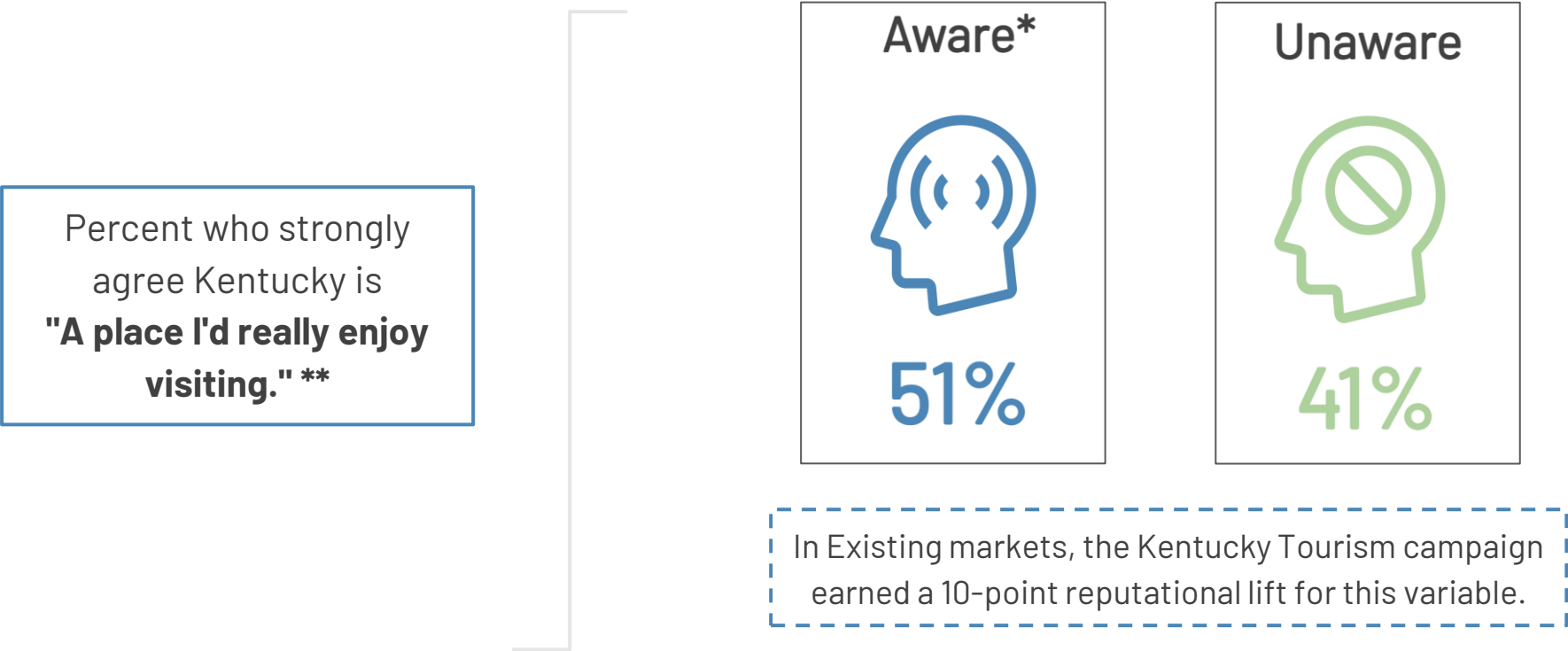


ADVERTISING IMPACT ON DESTINATION IMAGE



ADVERTISING IMPACT ON OVERALL DESTINATION IMAGE

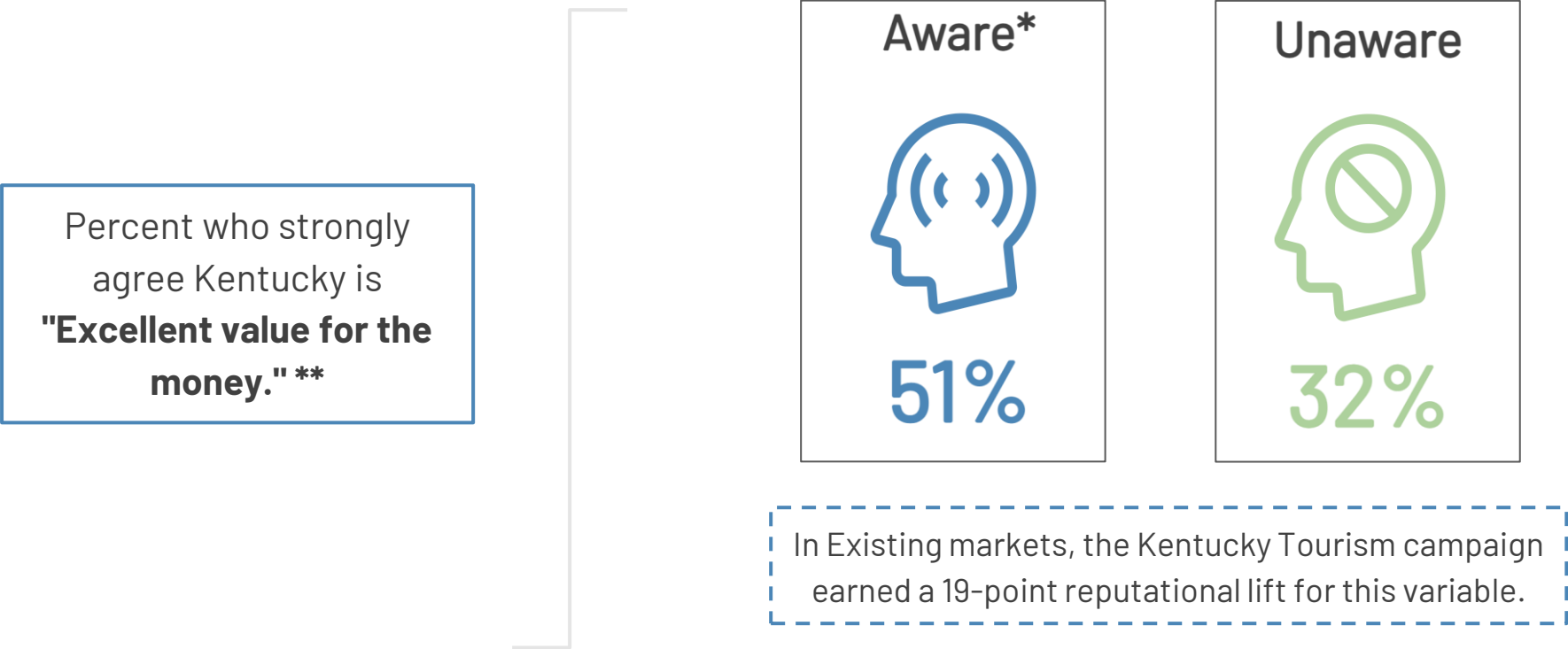
This campaign had a positive impact on travelers' perceptions of Kentucky. Travelers aware of the campaign gave the state a significantly higher rating than those unfamiliar with the campaign for the attribute **Kentucky is "a place I would really enjoy visiting"**.



*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
Base: Existing Markets

ADVERTISING IMPACT ON OVERALL DESTINATION IMAGE

This campaign had a positive impact on travelers' perceptions of Kentucky. Travelers aware of the campaign gave the state a significantly higher rating than those unfamiliar with the campaign for the attribute **Kentucky is "Excellent value for the money"**.



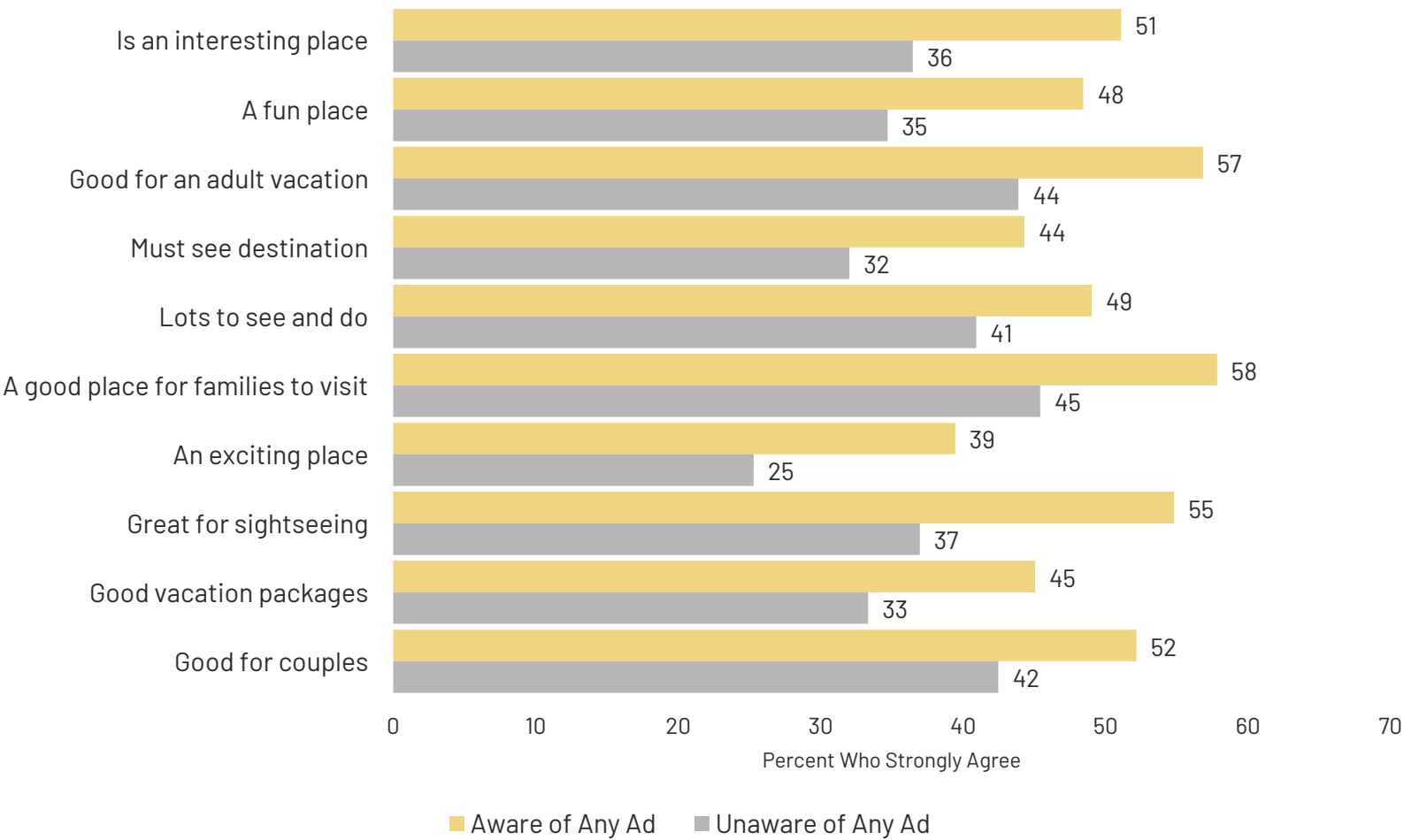
*Saw at least one ad
**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10
Base: Existing Markets

ADVERTISING IMPACT ON HOT BUTTONS

This campaign had a strong positive impact on Existing advertising market travelers' perceptions of Kentucky.

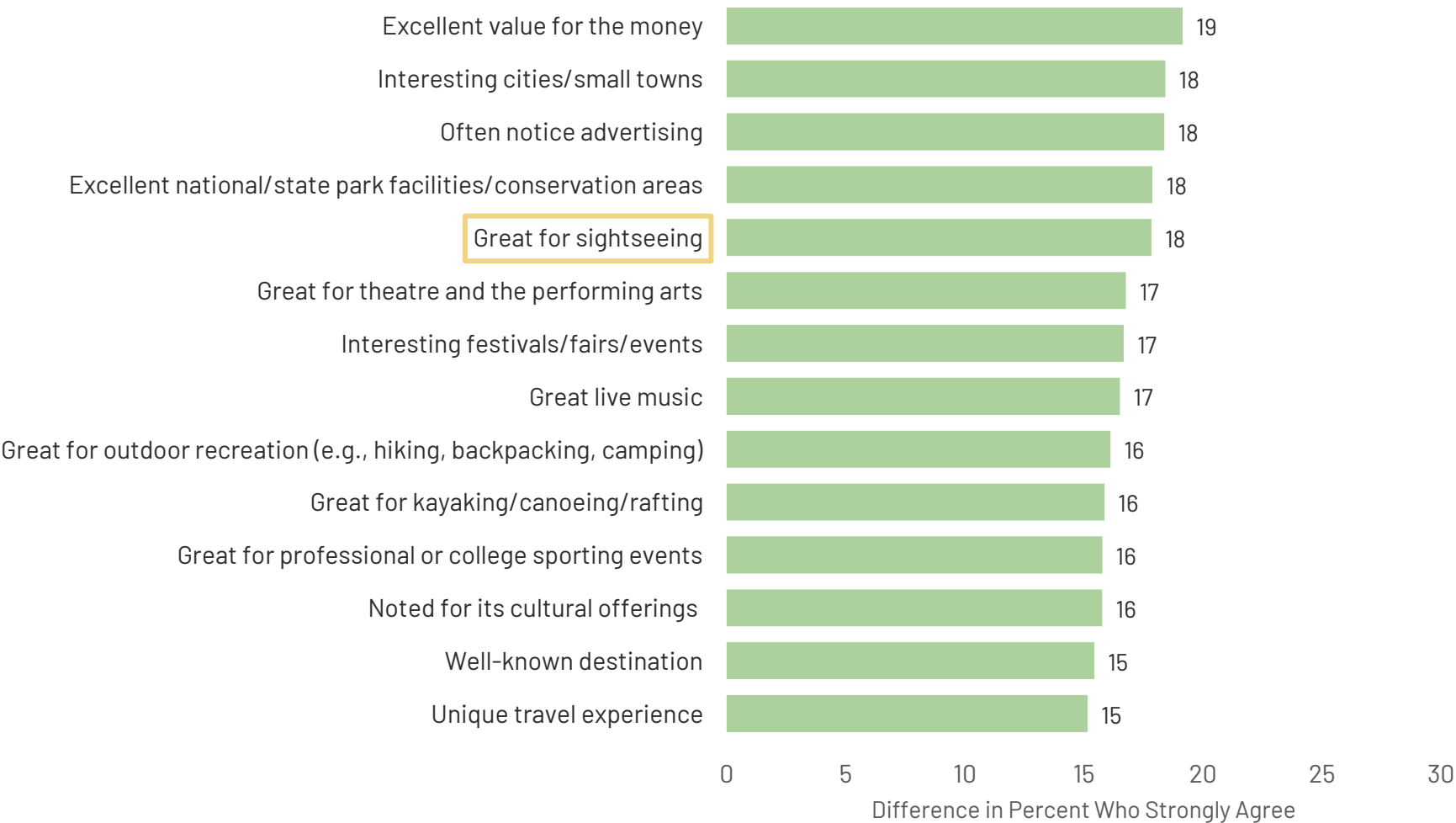
Existing advertising market residents exposed to the campaign gave the destination higher rating scores than those unfamiliar with the campaign for all Hot Buttons.

For the remaining destination attributes & perceptions, we find that the campaign did an exceptional job of improving people's perceptions of Kentucky for every image dimension evaluated.



DESTINATION IMAGE MOST IMPACTED BY ADVERTISING

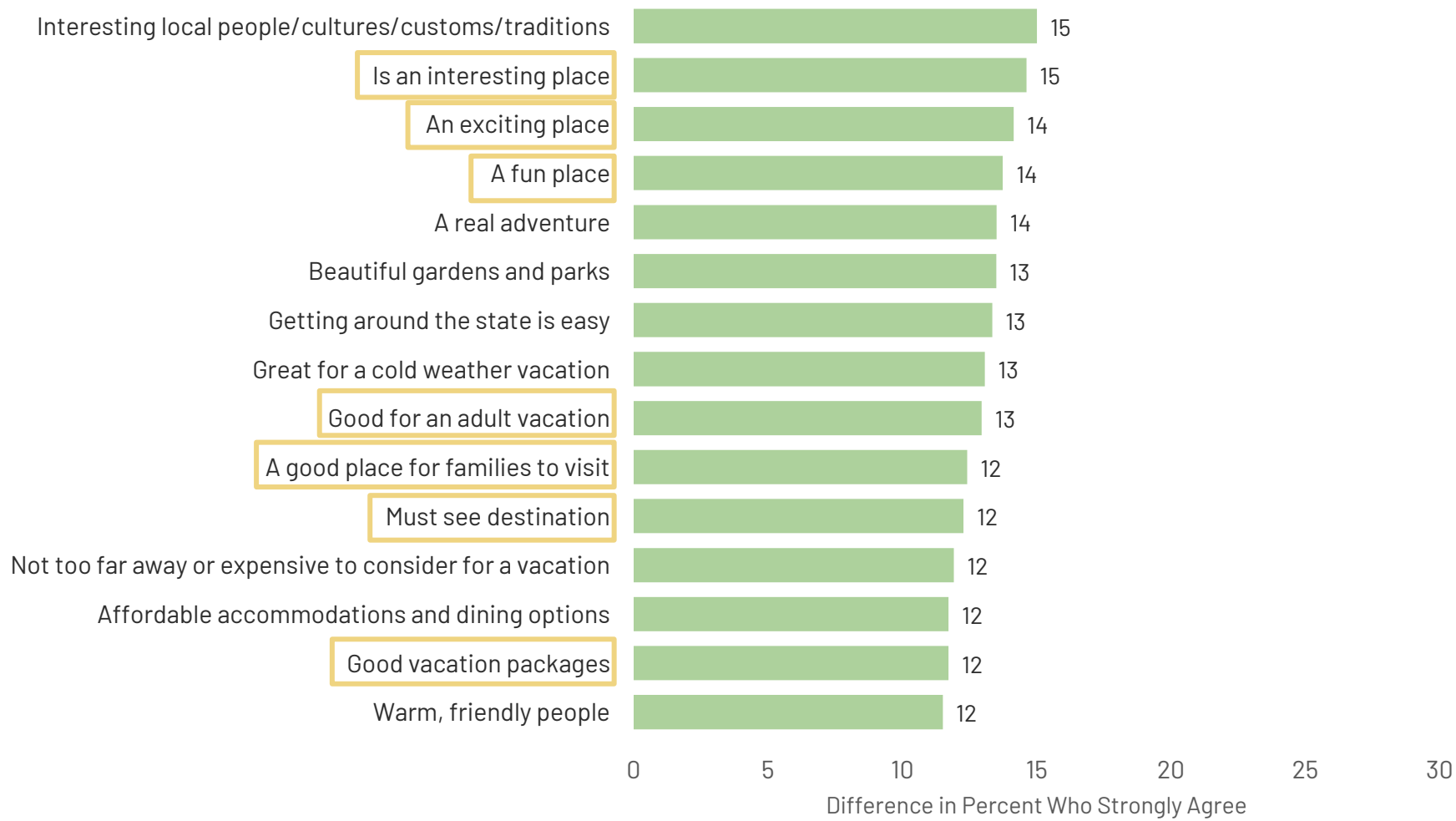
"Difference in Percent Who Strongly Agree"
is taken from comparing the destination
image ratings of respondents who are
Aware of Advertising vs.
Unaware of Advertising.



Hot Button

Base: Existing Markets

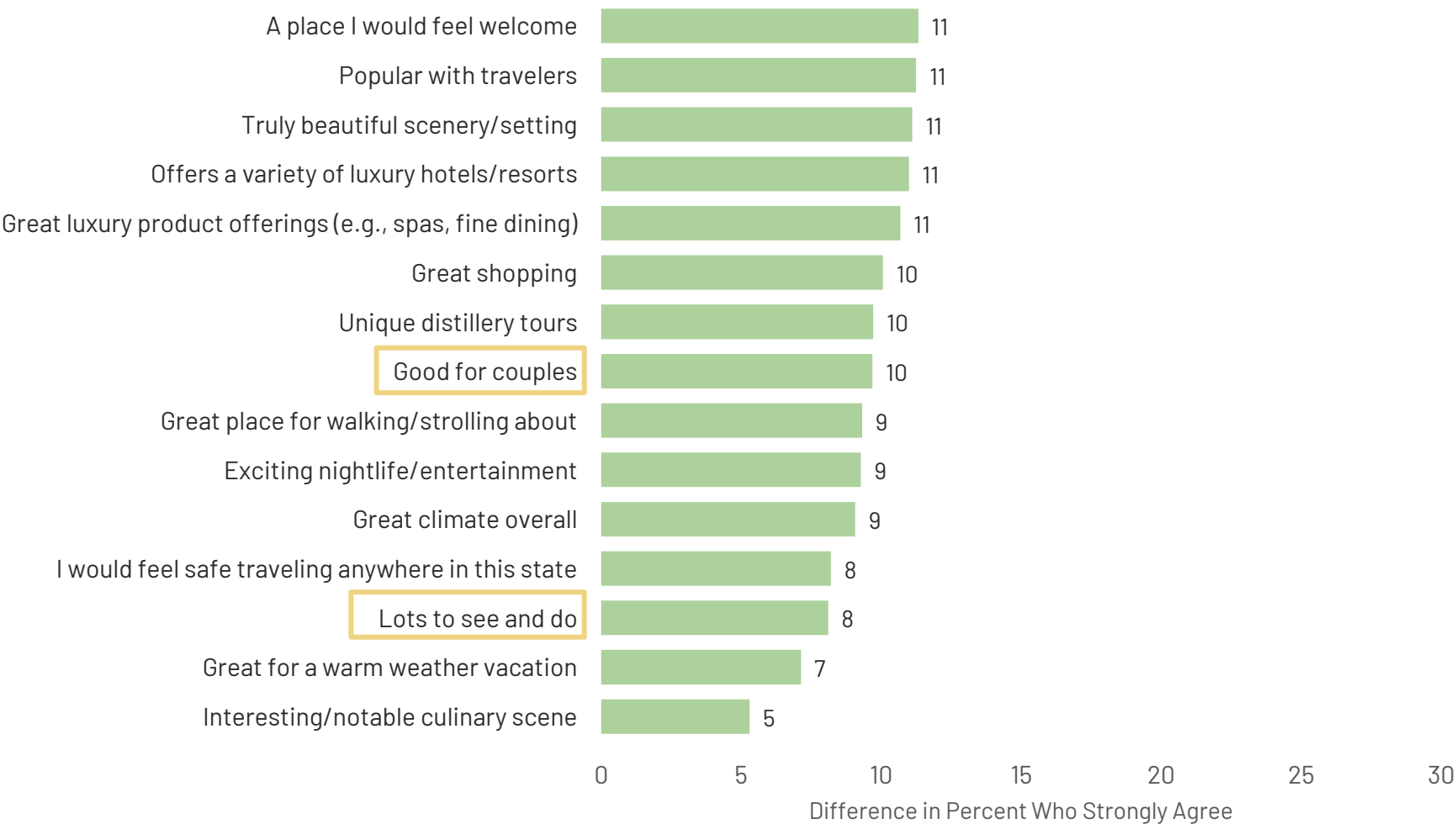
DESTINATION IMAGE MOST IMPACTED BY ADVERTISING (Cont'd)



Hot Button

Base: Existing Markets

DESTINATION IMAGE MOST IMPACTED BY ADVERTISING (Cont'd)



Hot Button

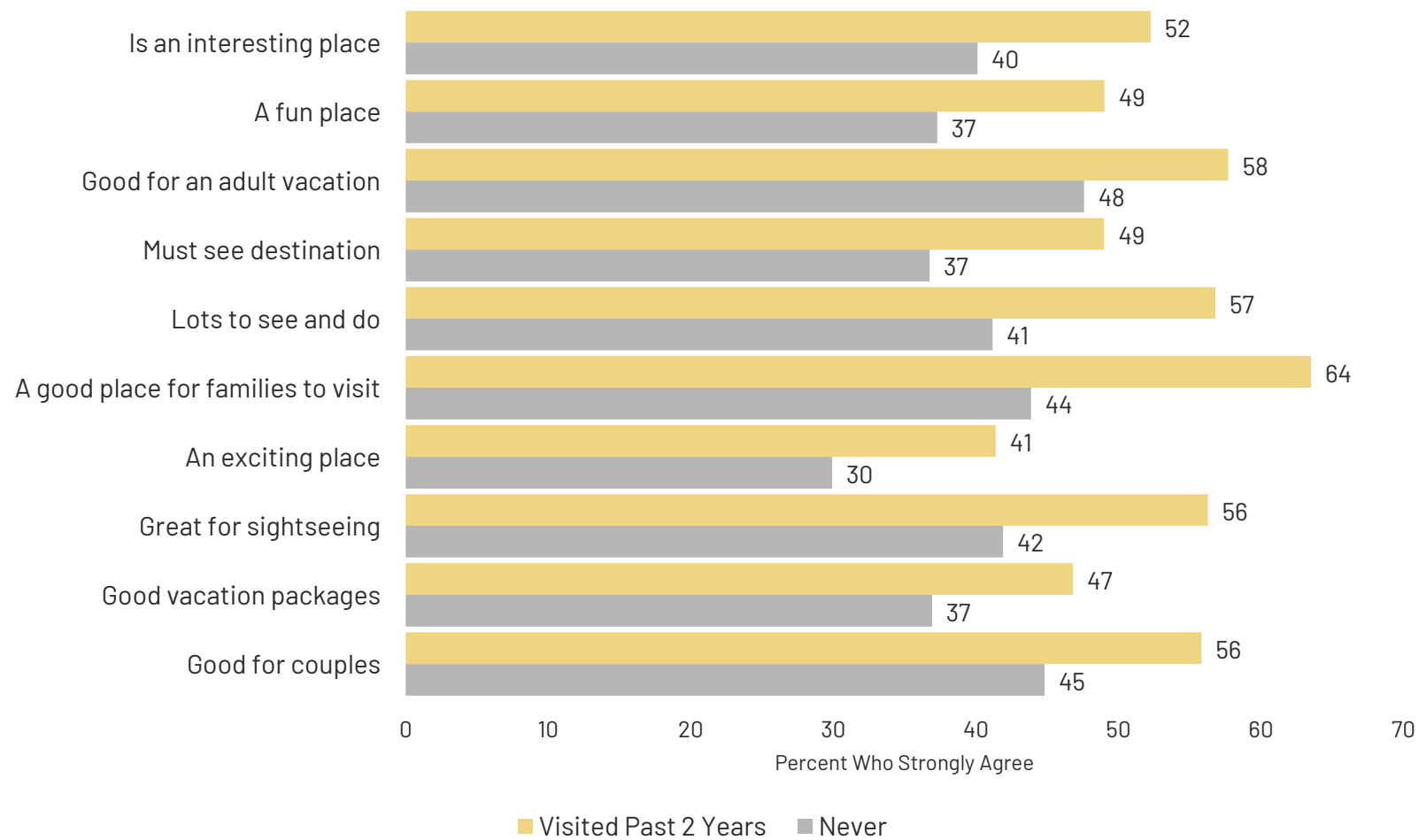
Base: Existing Markets



[PRODUCT DELIVERY]



PRODUCT VS. HOT BUTTONS



Comparing the Image ratings of people who have **never visited** Kentucky versus that of those who have **visited in the past two years**, we have a measure of **“product delivery,”** the relative satisfaction of the two groups.

TOP PRODUCT STRENGTHS VS. DESTINATION IMAGE



In Existing markets, more recent Kentucky visitors than non-visitors rated the destination favorably in all 10 Hot Button attributes.

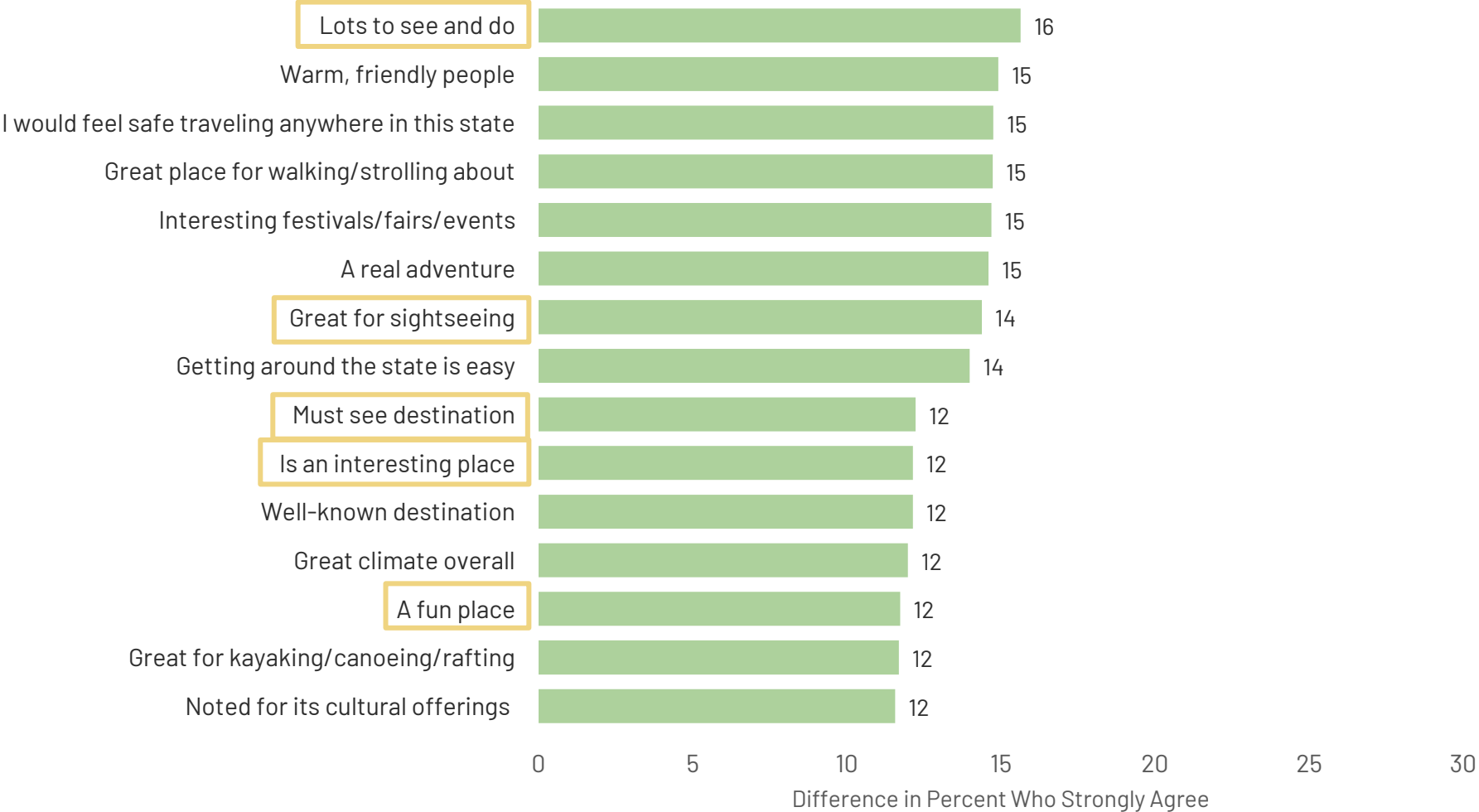
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of respondents **Who have Visited in the Past 2 Years** vs. those who have **Never Visited**.



Hot Button

Base: Existing Markets

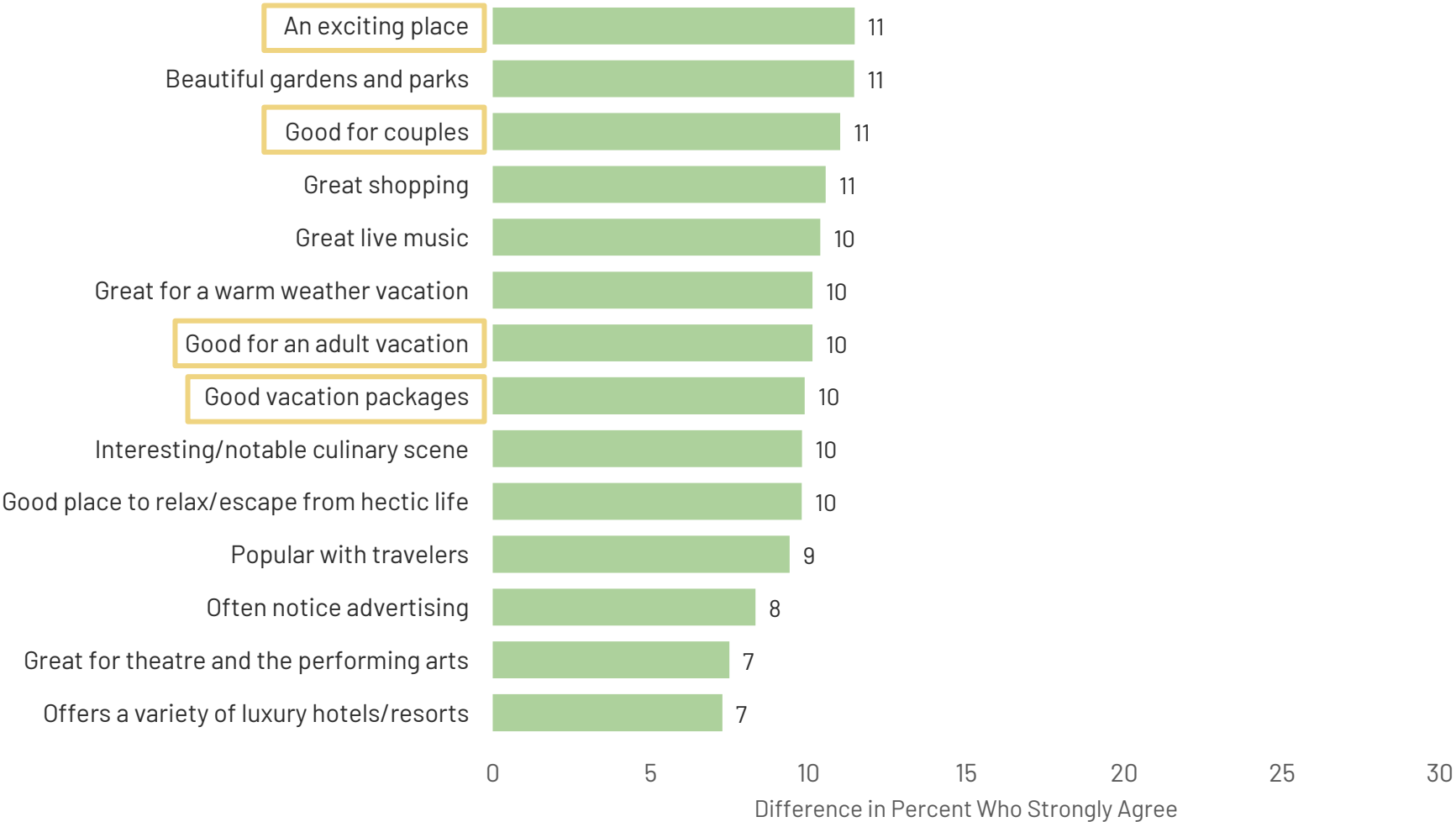
TOP PRODUCT STRENGTHS VS. DESTINATION IMAGE (Cont'd)



Hot Button

Base: Existing Markets

TOP PRODUCT STRENGTHS VS. DESTINATION IMAGE (Cont'd)



Hot Button

Base: Existing Markets

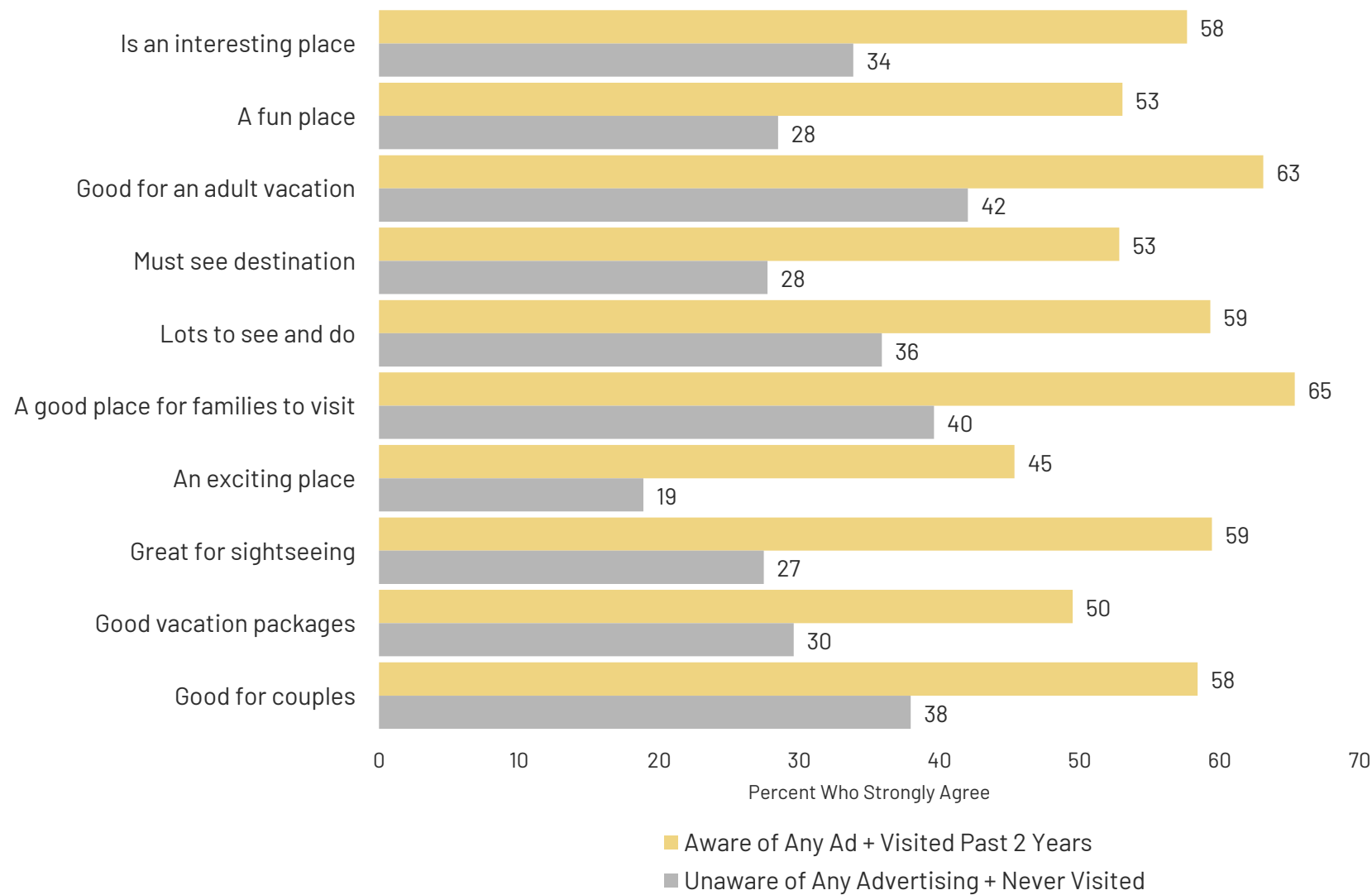
**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT WEAKNESSES
VS. DESTINATION IMAGE**



[HOT BUTTONS: IMPACT OF AWARENESS AND VISITATION]



IMPACT OF AD AWARENESS + VISITATION ON HOT BUTTONS



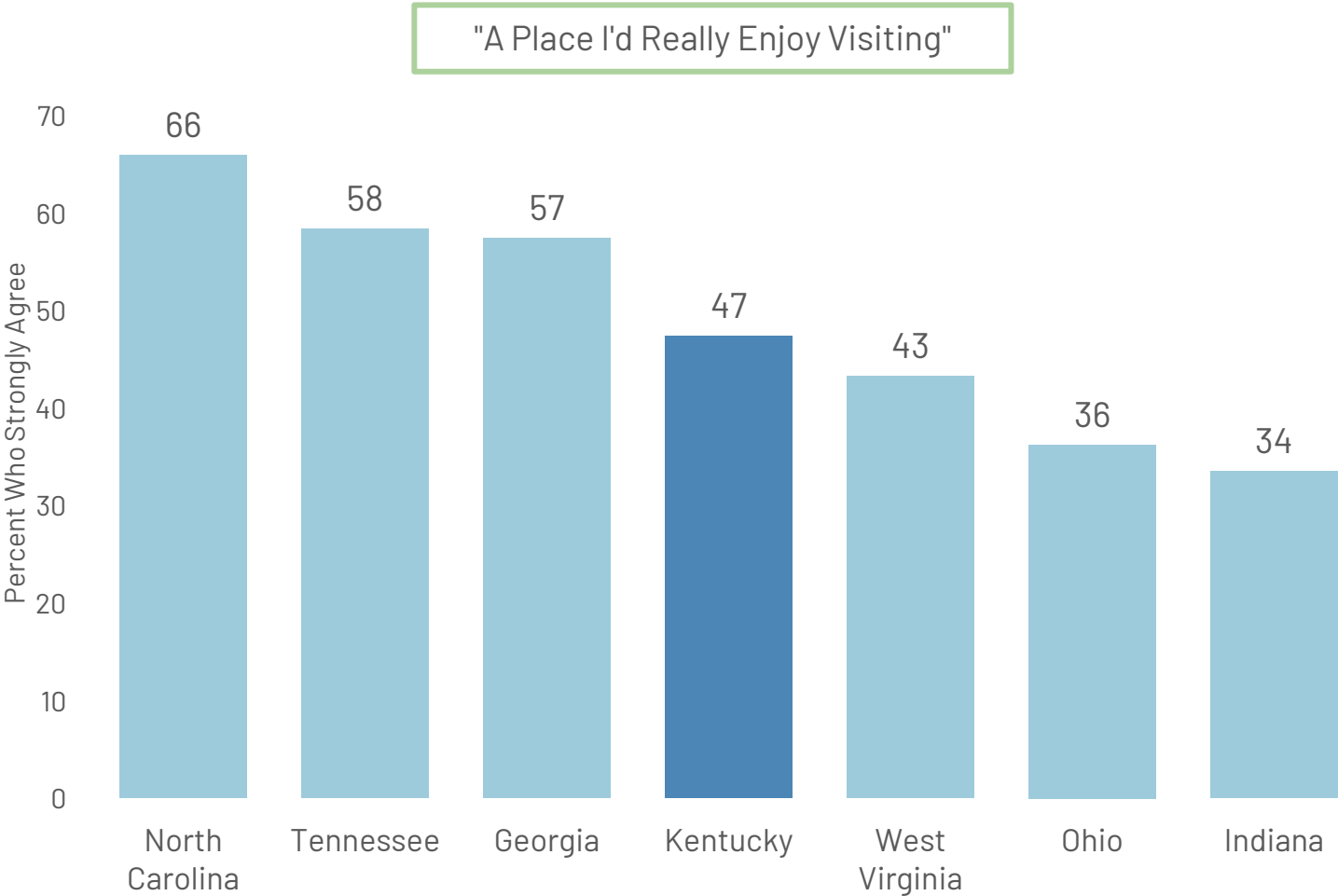
Base: Existing Markets



DESTINATION IMAGE
VS. THE COMPETITION



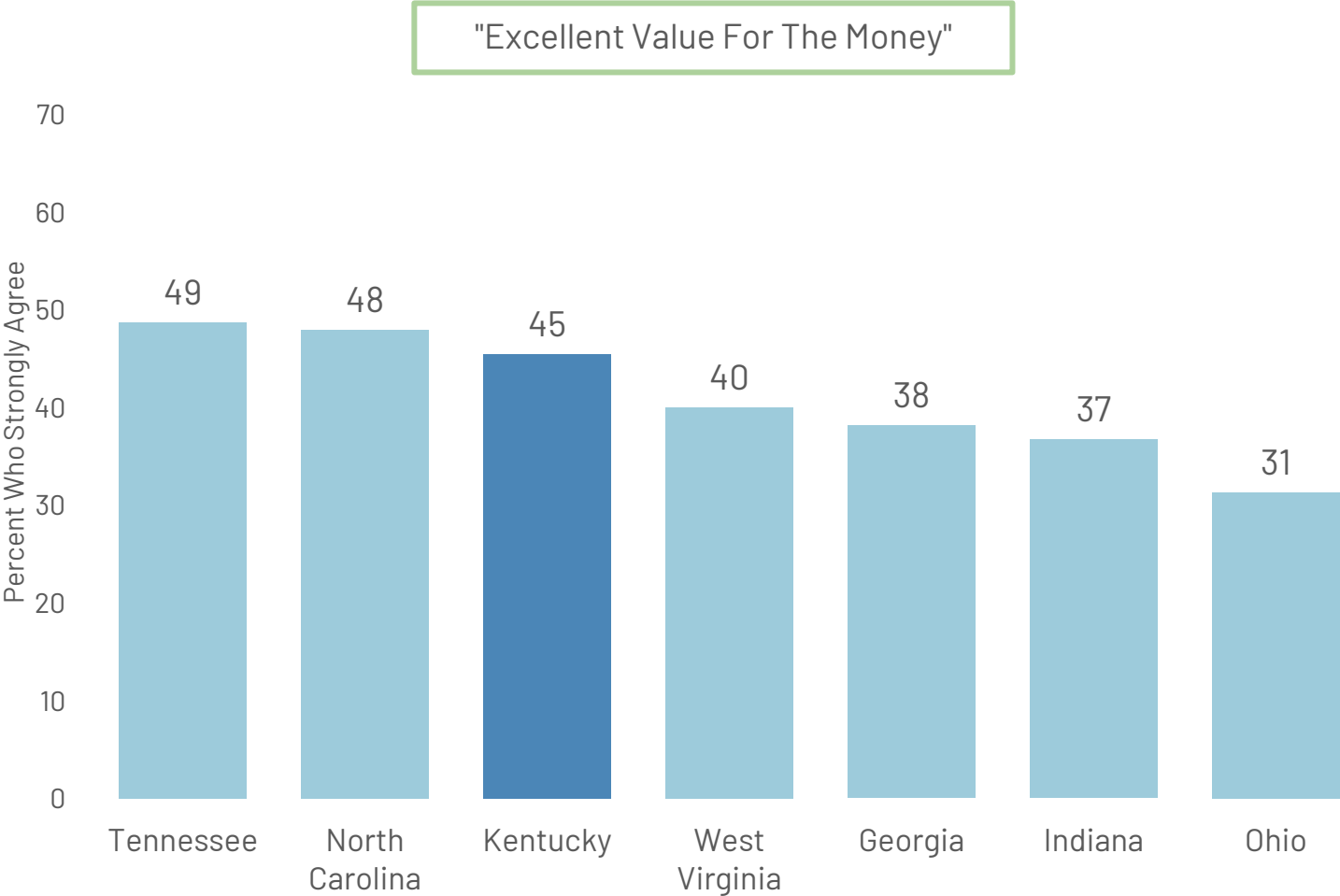
OVERALL DESTINATION IMAGE VS. COMPETITION



Relative to the other destinations in the competitive set for this study, Kentucky places in the middle for its overall image among Existing advertising market travelers.

Across the Existing advertising markets surveyed, almost half (47%) rated Kentucky very favorably as a destination they “would really enjoy visiting.” Kentucky ranks in third place behind North Carolina (66%), Tennessee (58%) & Georgia (57%), and ahead of West Virginia (43%), Ohio (36%) and Indiana (34%).

OVERALL IMAGE VS. COMPETITION

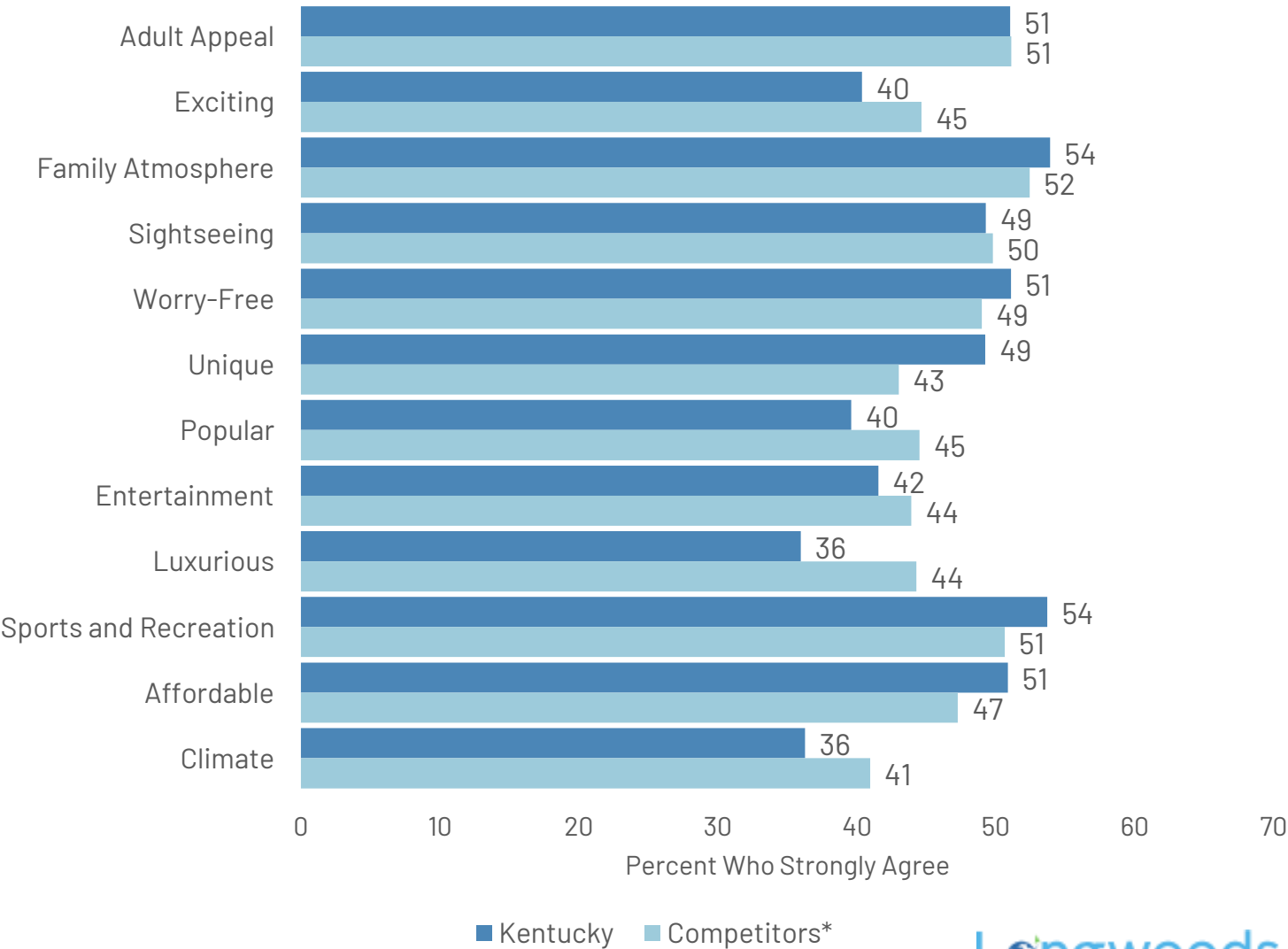


In Existing markets, amongst the competitive destinations included in this study, Kentucky ranks more favorably as a destination that offers excellent value for the money.

Across the Existing advertising markets surveyed, over four in ten (45%) rated Kentucky very favorably as a destination that has "excellent value for the money." Kentucky is tied in second place, with North Carolina (48%). Ranking behind Tennessee (49%), and ahead of West Virginia (40%), Georgia (38%), Indiana (37%), and Ohio (31%).

OVERALL DESTINATION IMAGE VS. COMPETITION

Kentucky is tied with its combined competitive set in six of the twelve Travel Motivator categories in Existing markets. Kentucky overperforms versus its combined competitive set for unique & affordable, but underperforms for exciting, popular, luxurious, and climate.



* Includes Tennessee, Georgia, Indiana, Ohio, West Virginia, and North Carolina
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - ADULT APPEAL



Adult Appeal

Kentucky*

51

Competitors*

51

Good for an adult vacation

53

53

Good for couples

49

49

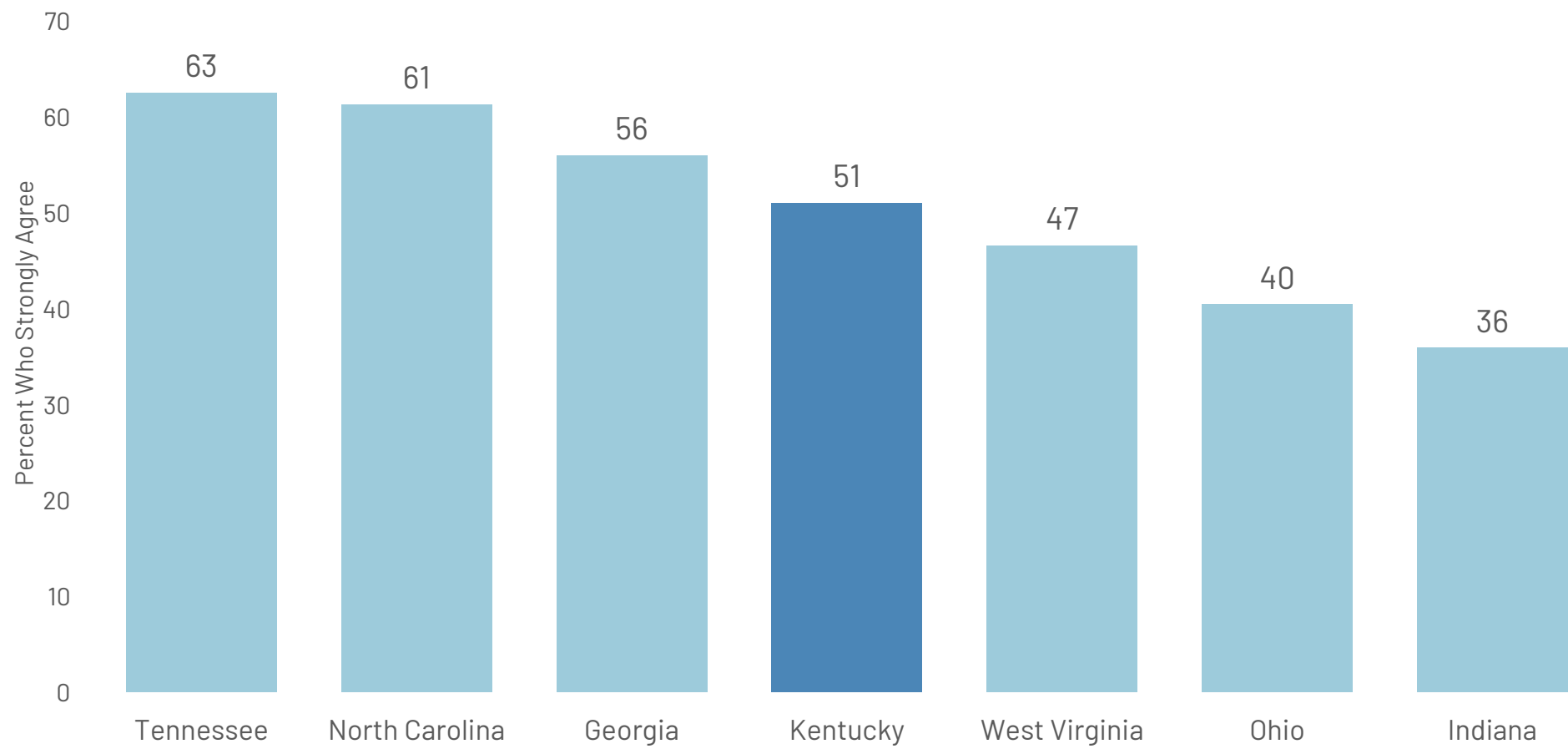
0 10 20 30 40 50 60 70
Percent Who Strongly Agree

Kentucky Competitors

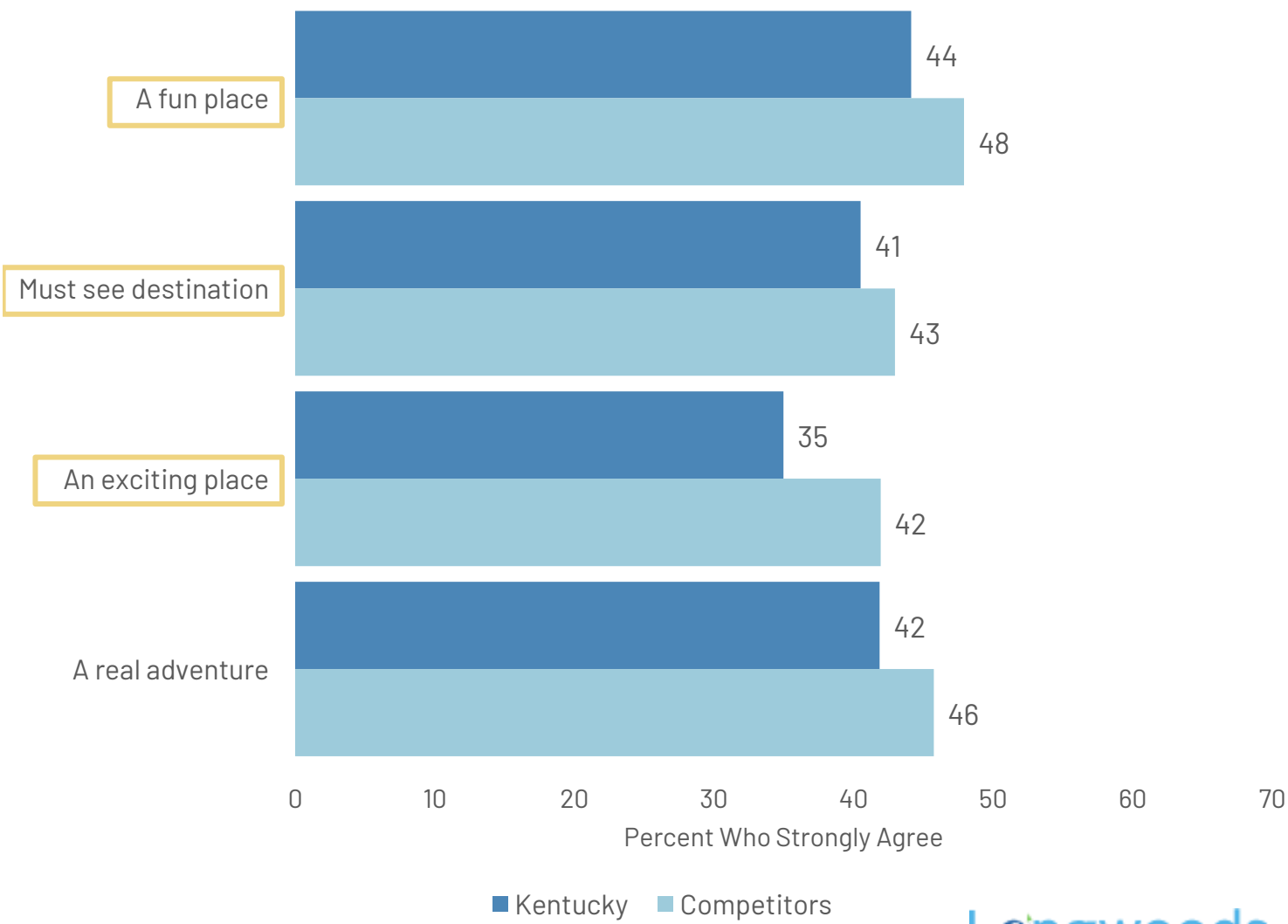
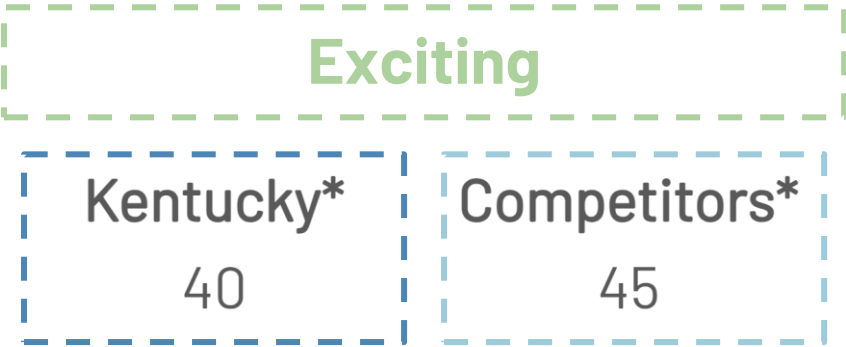
Hot Button

*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION – ADULT APPEAL



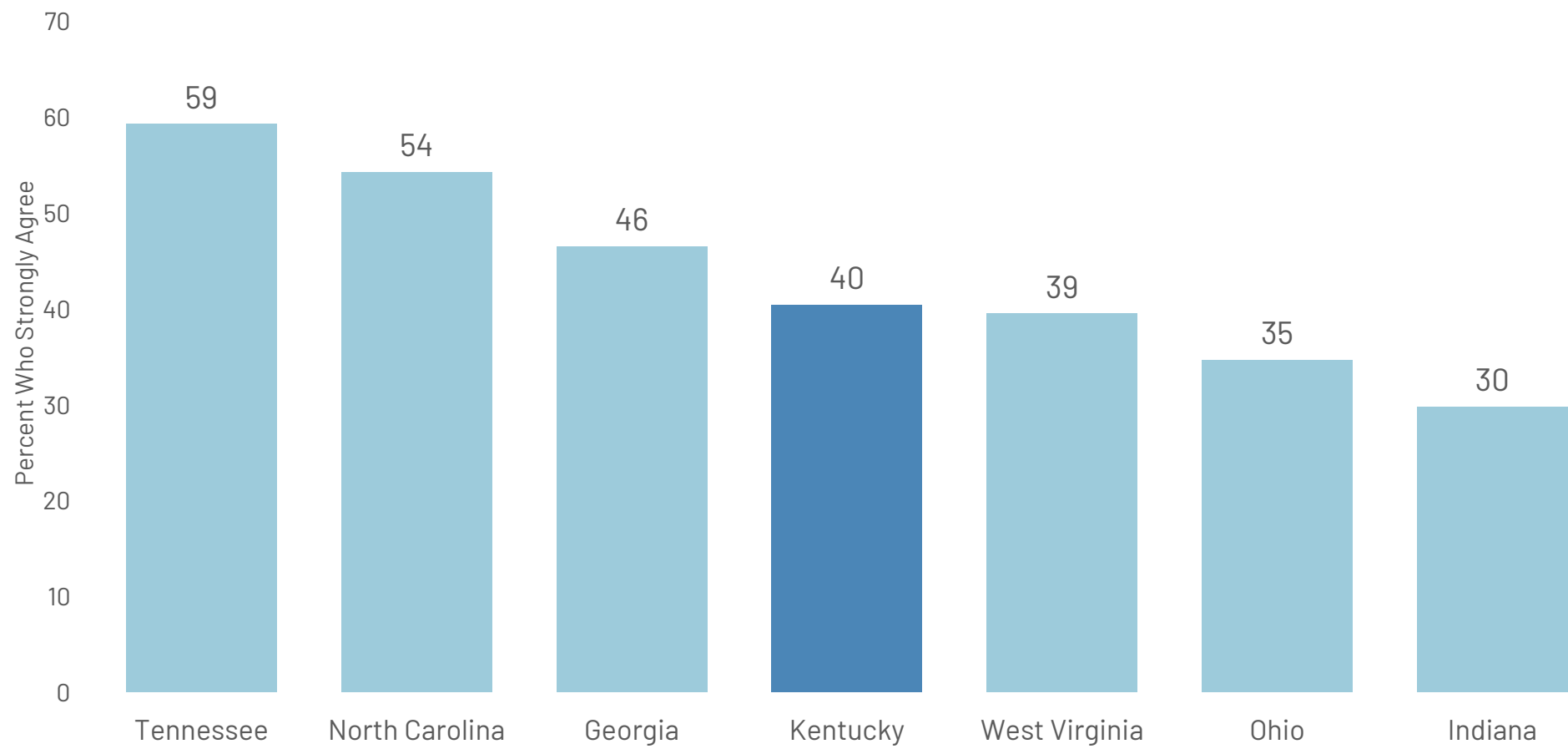
DESTINATION IMAGE VS. COMPETITION - EXCITING



Hot Button

*Percent who strongly agree
Base: Existing Markets

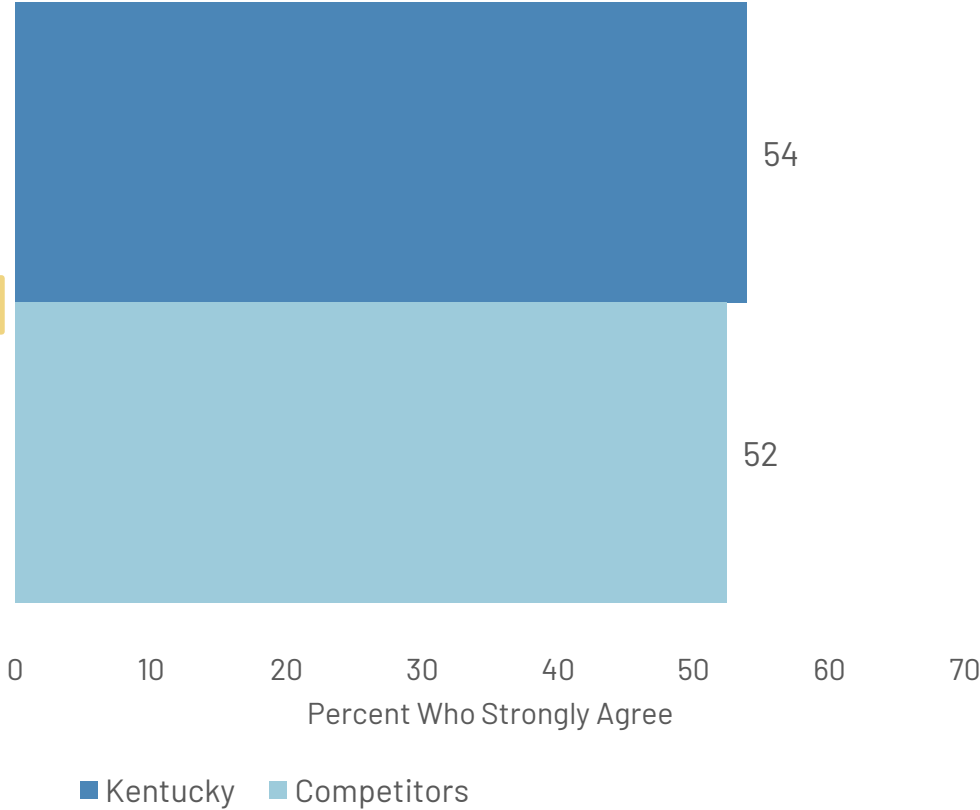
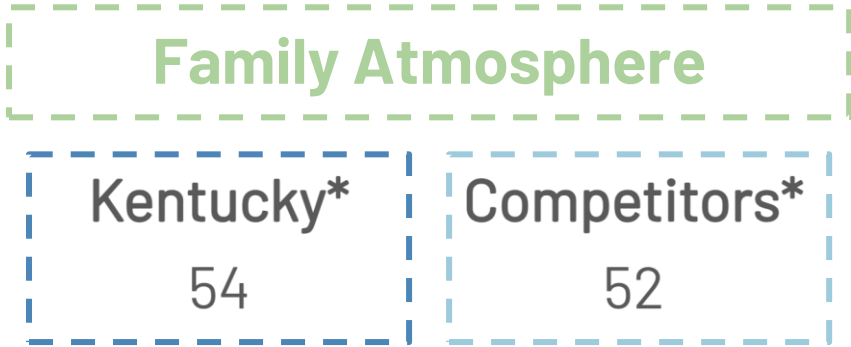
DESTINATION IMAGE VS. COMPETITION - EXCITING



DESTINATION IMAGE VS. COMPETITION – FAMILY ATMOSPHERE



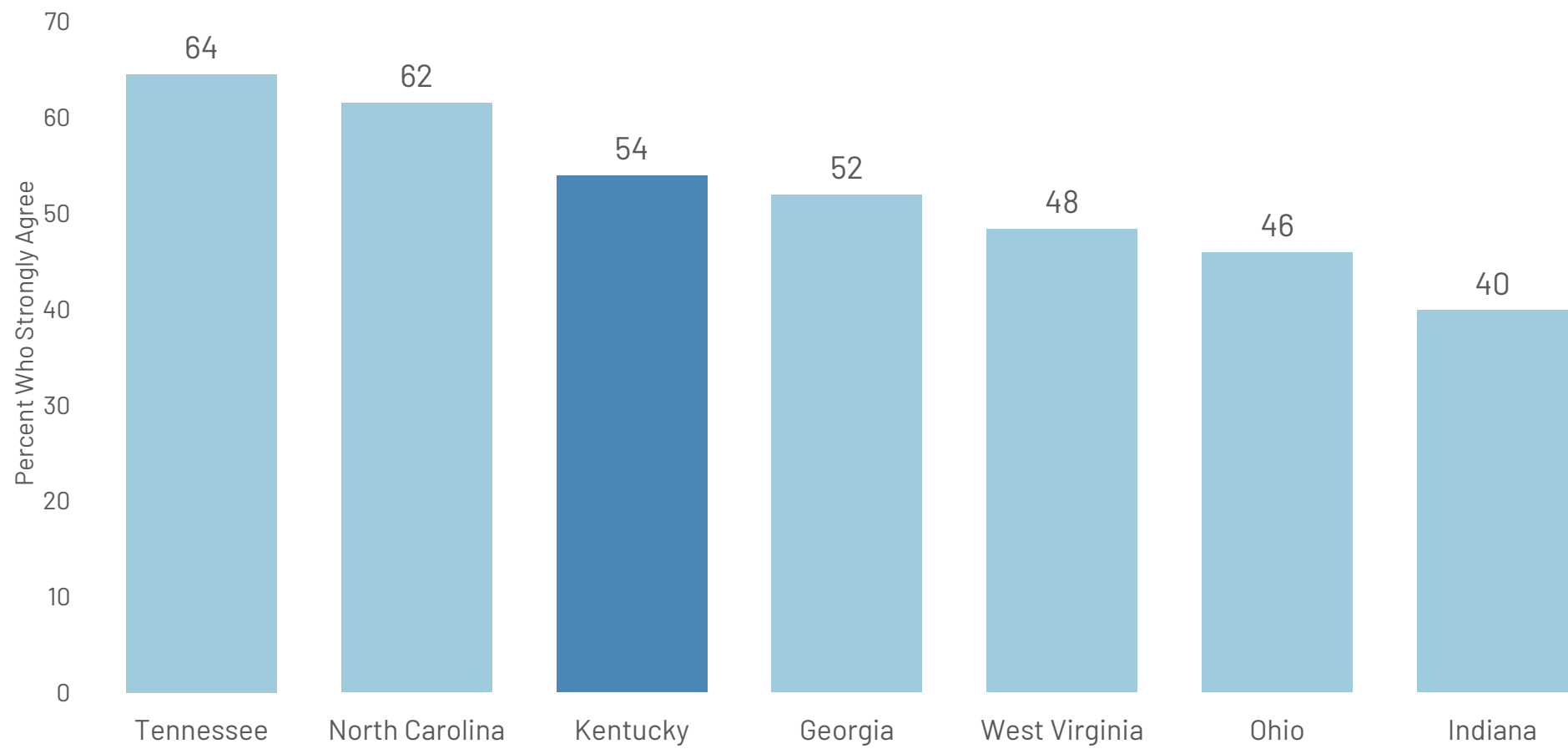
A good place for families to visit



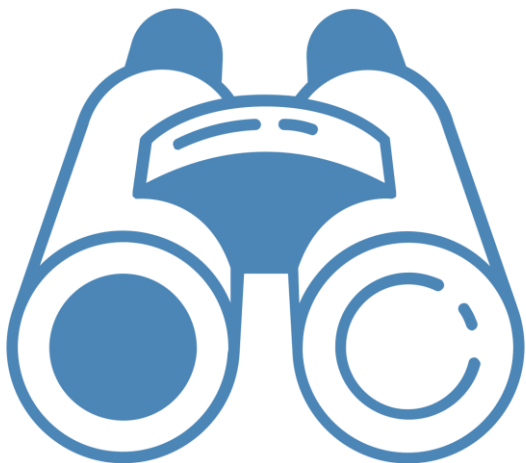
Hot Button

*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION – FAMILY ATMOSPHERE



DESTINATION IMAGE VS. COMPETITION – SIGHTSEEING



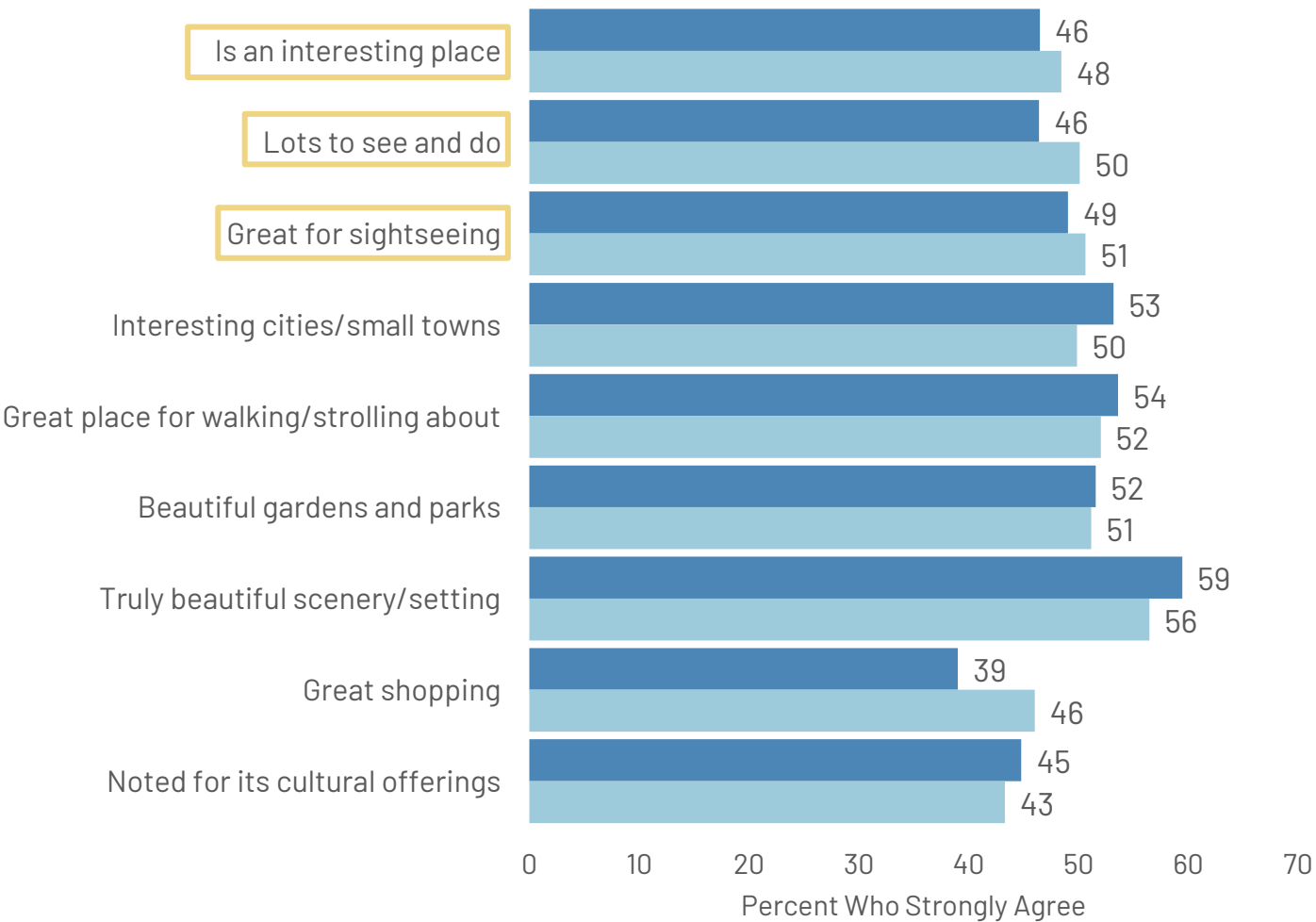
Sightseeing

Kentucky*

49

Competitors*

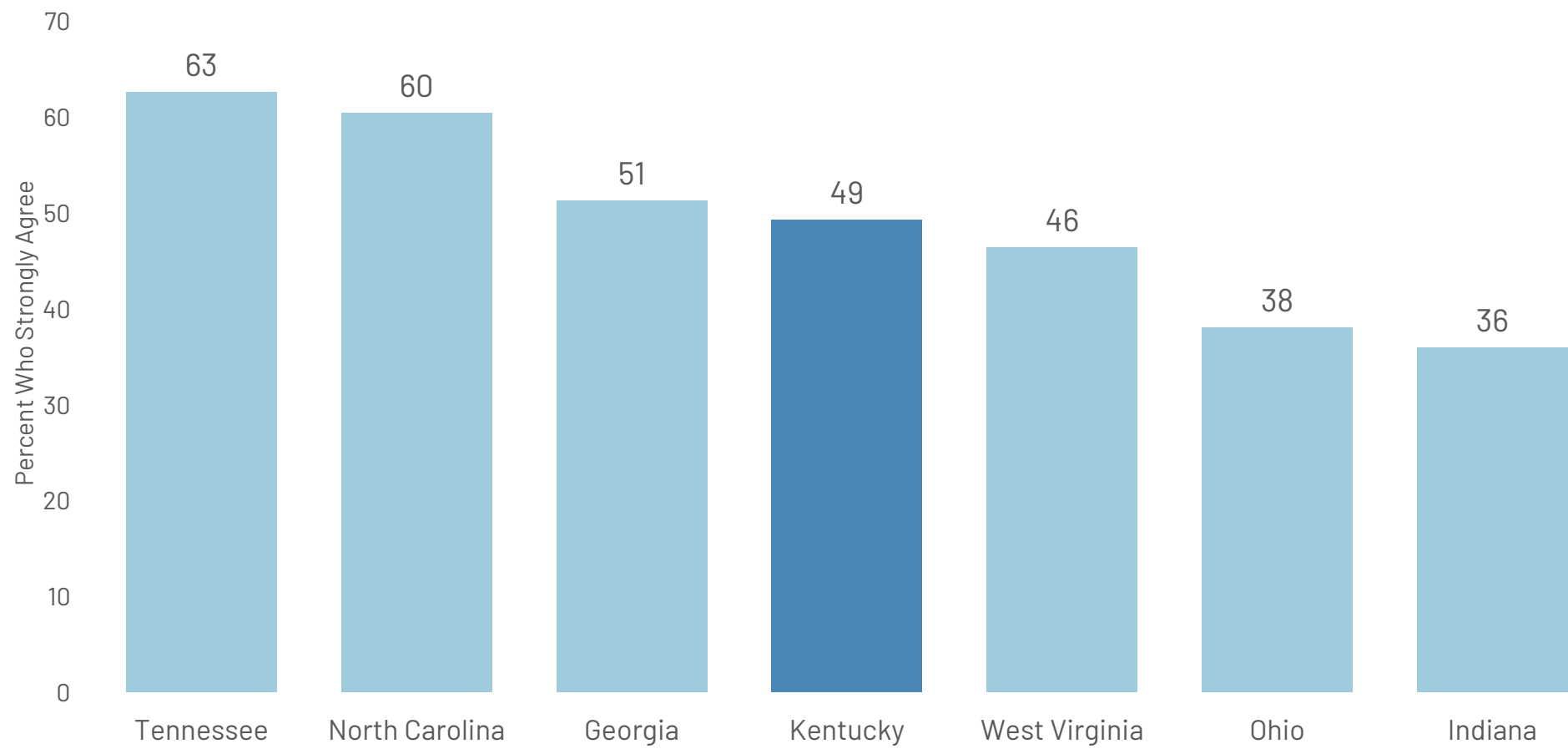
50



Hot Button

*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION – SIGHTSEEING



DESTINATION IMAGE VS. COMPETITION - WORRY-FREE



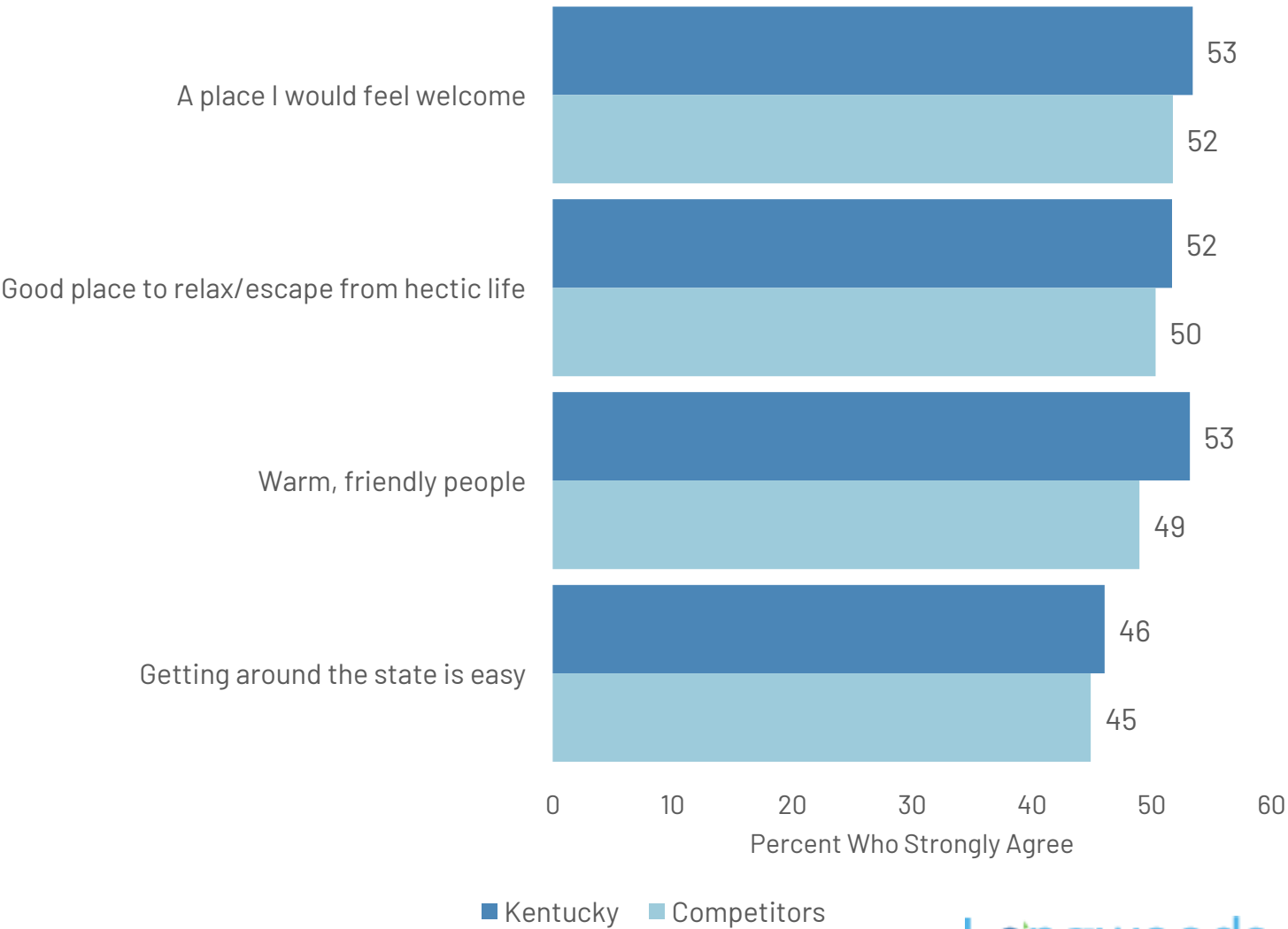
Worry-Free

Kentucky*

51

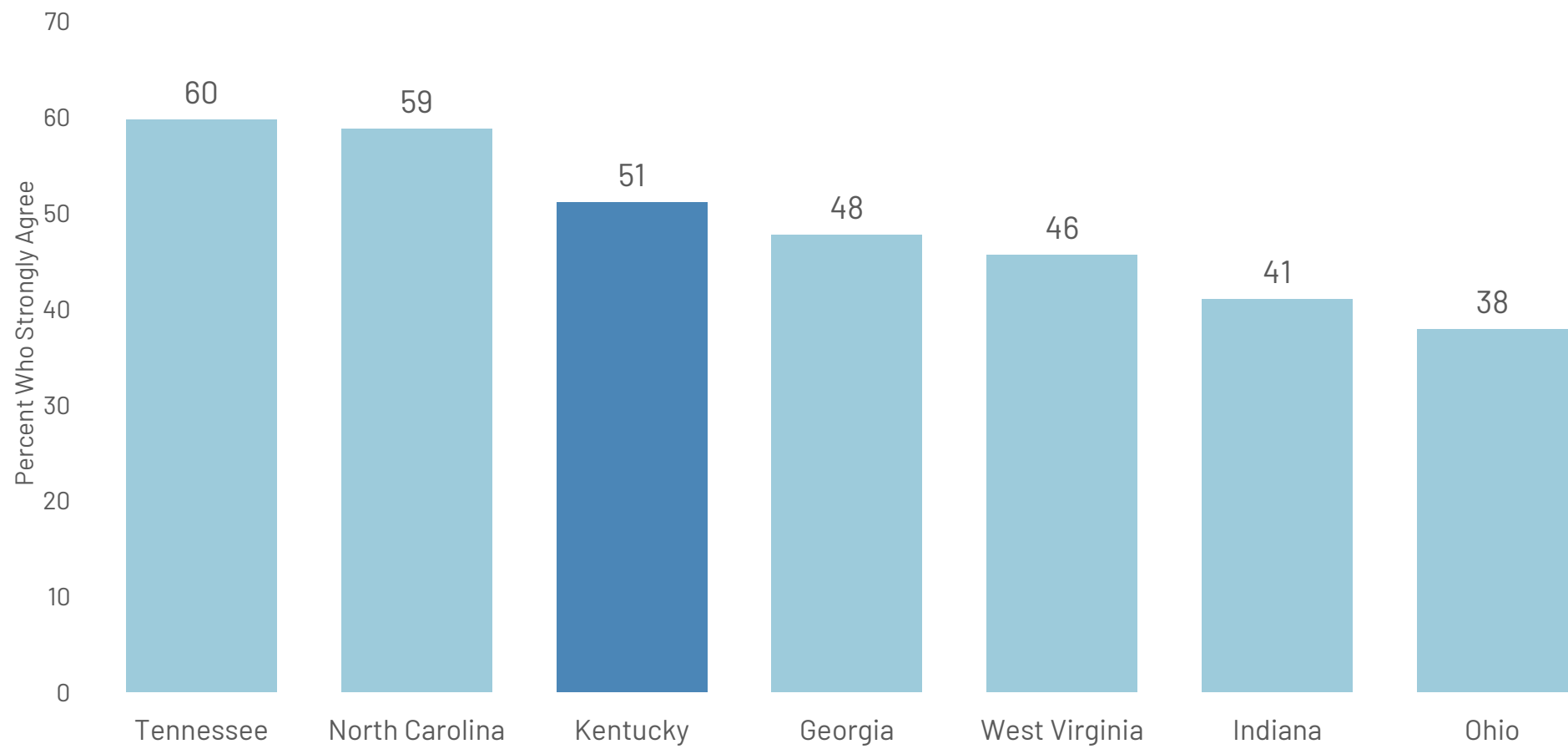
Competitors*

49

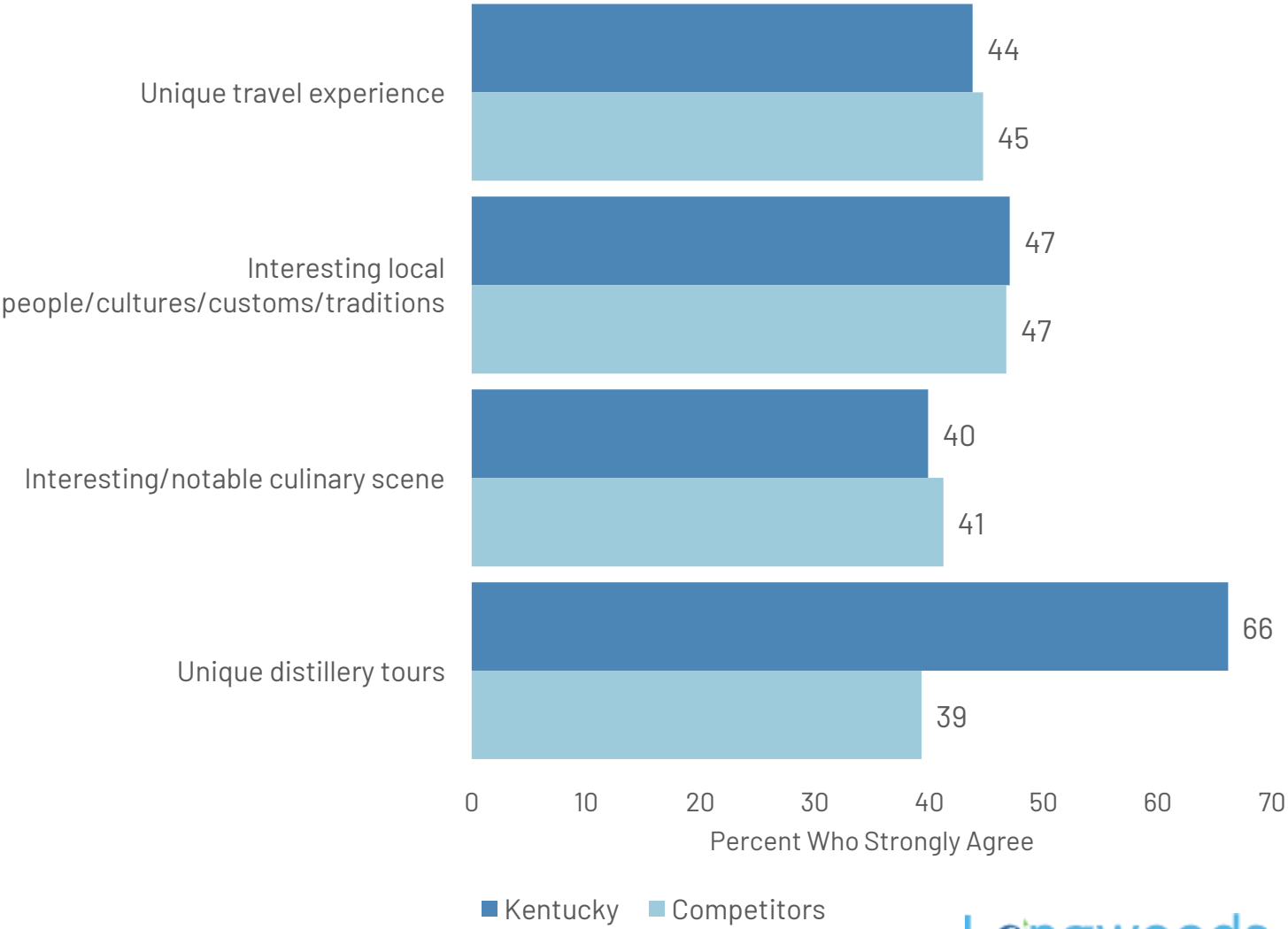
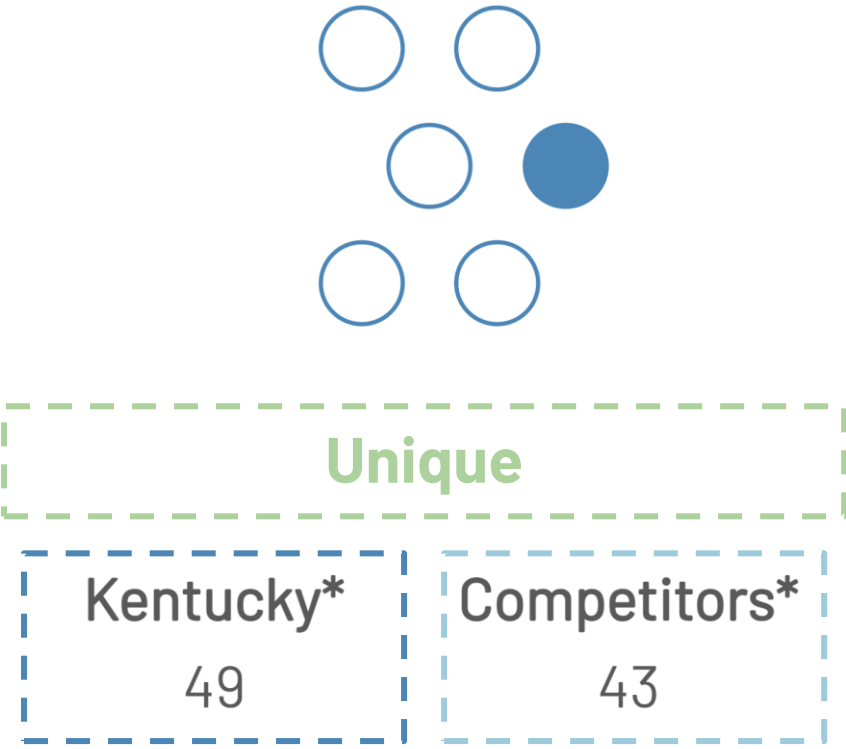


*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - WORRY-FREE

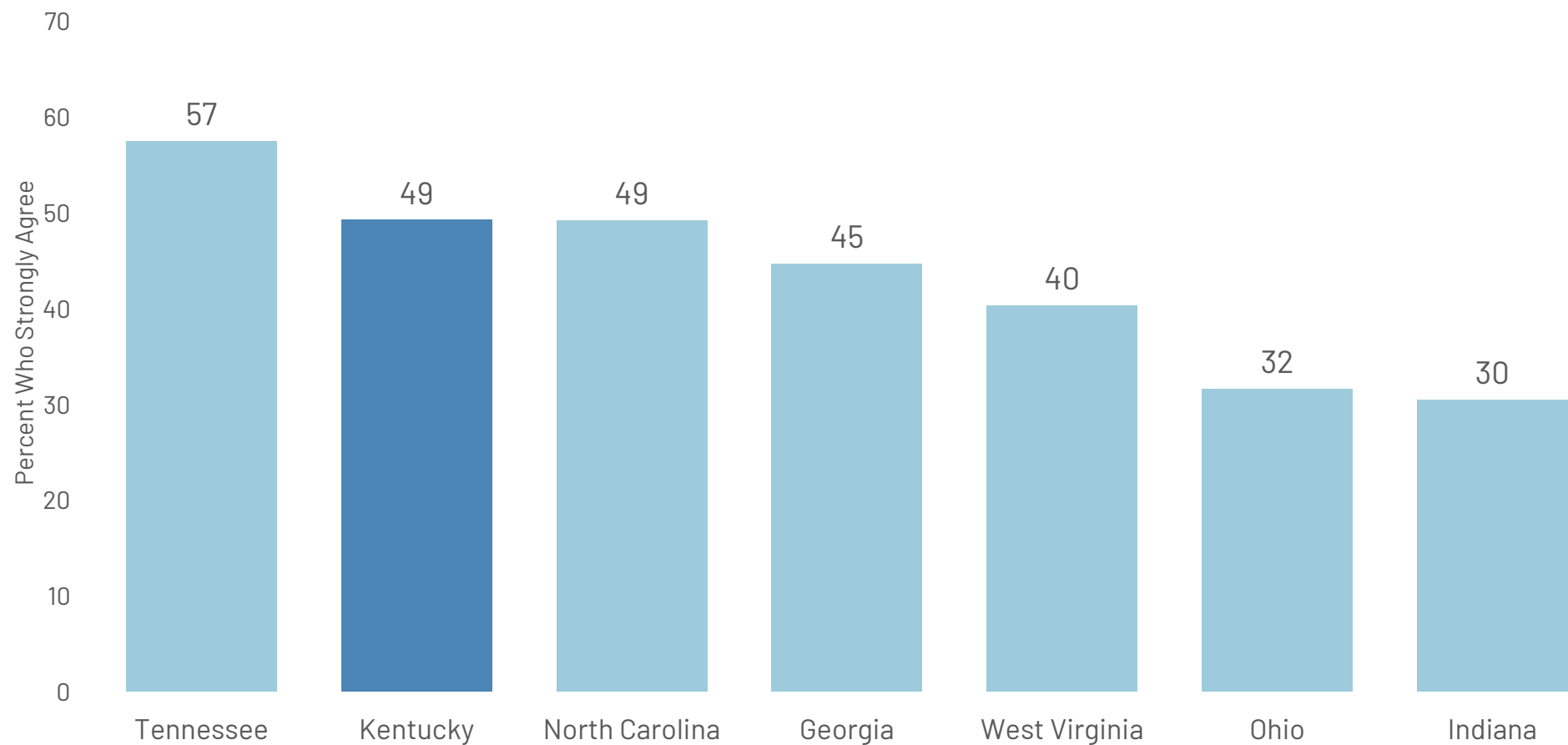


DESTINATION IMAGE VS. COMPETITION - UNIQUE

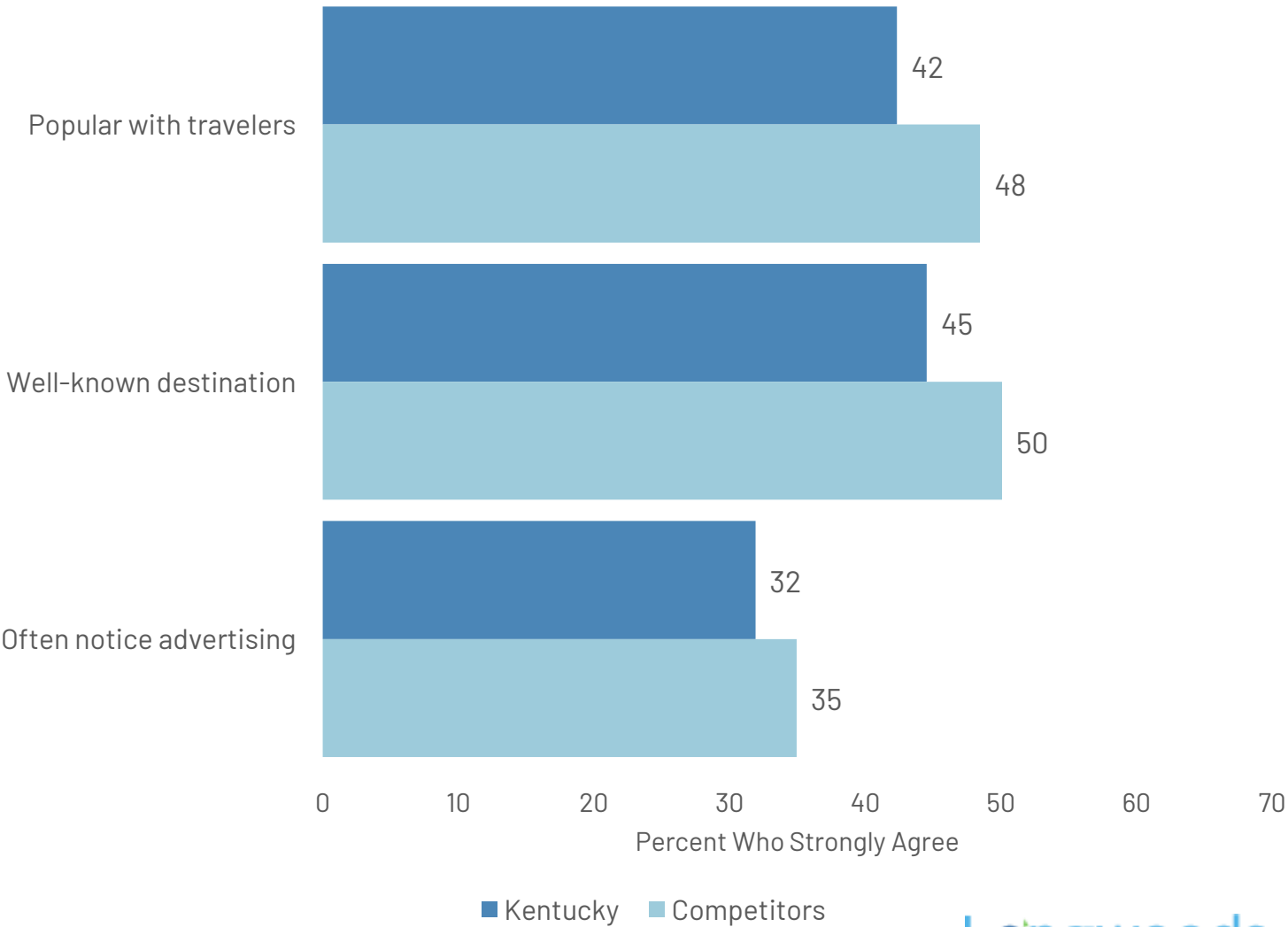
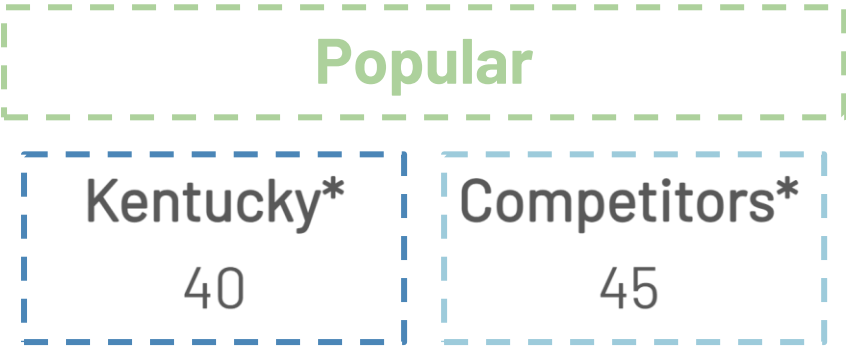


*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - UNIQUE

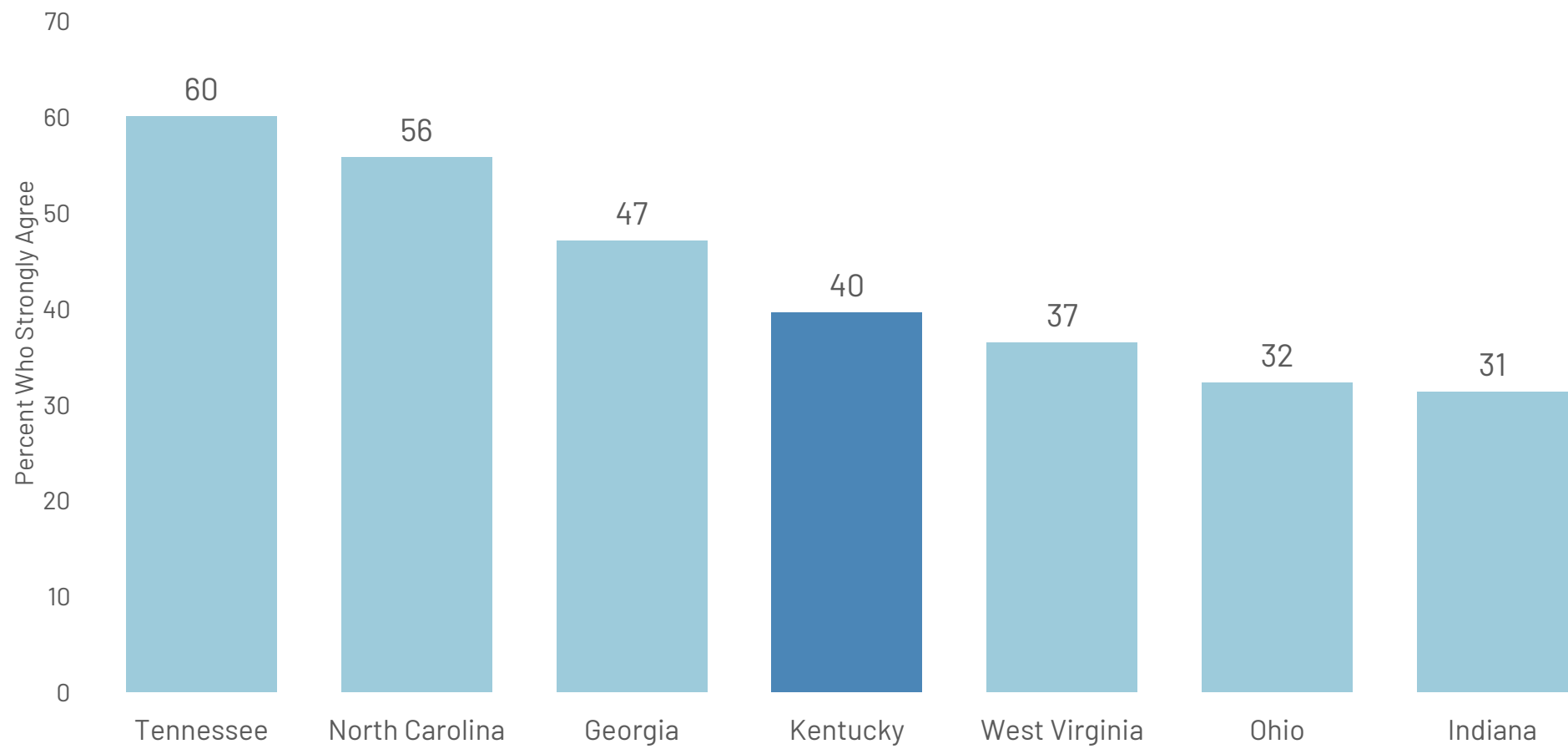


DESTINATION IMAGE VS. COMPETITION - POPULAR



*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION – POPULAR



DESTINATION IMAGE VS. COMPETITION - ENTERTAINMENT



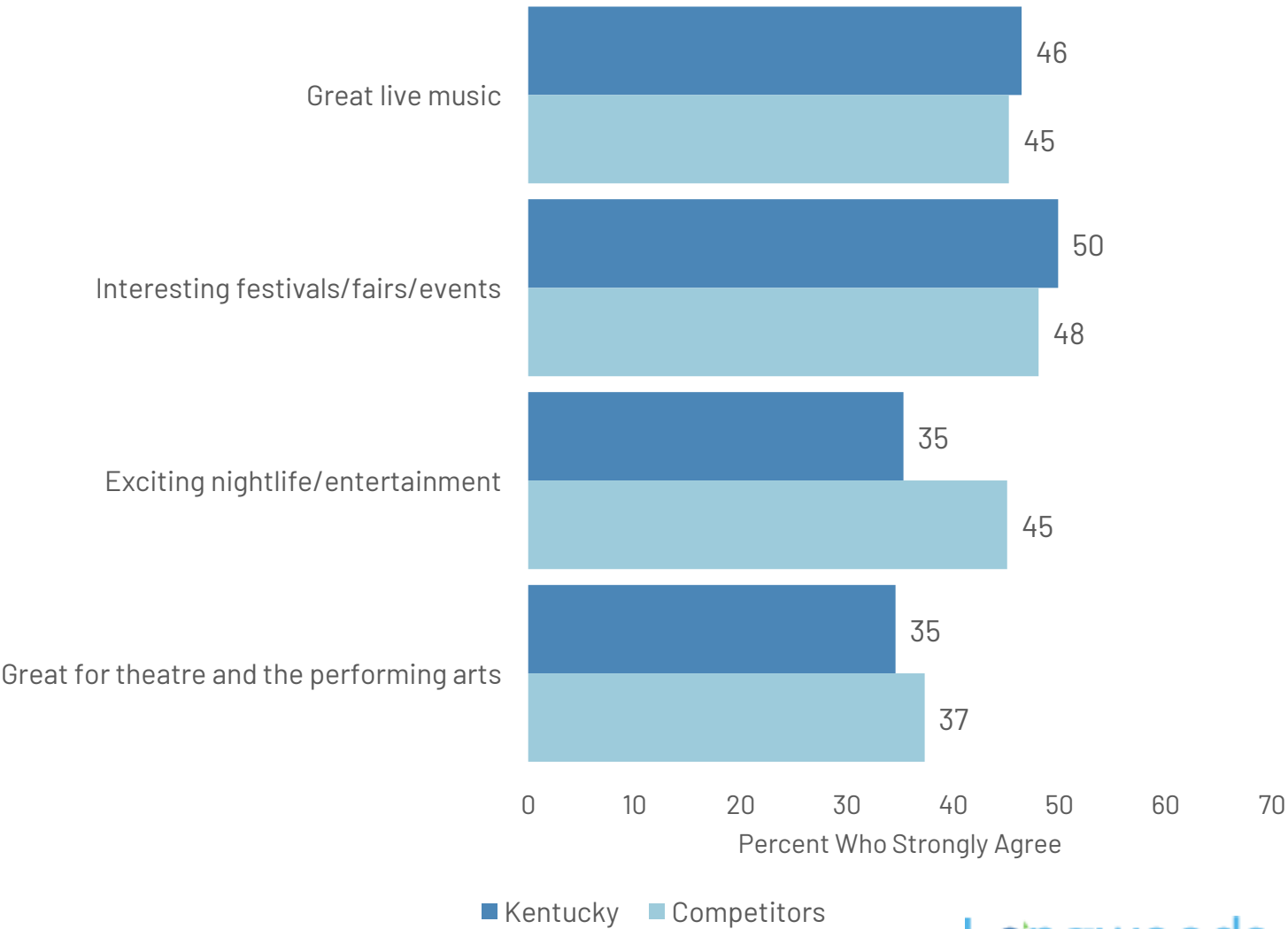
Entertainment

Kentucky*

42

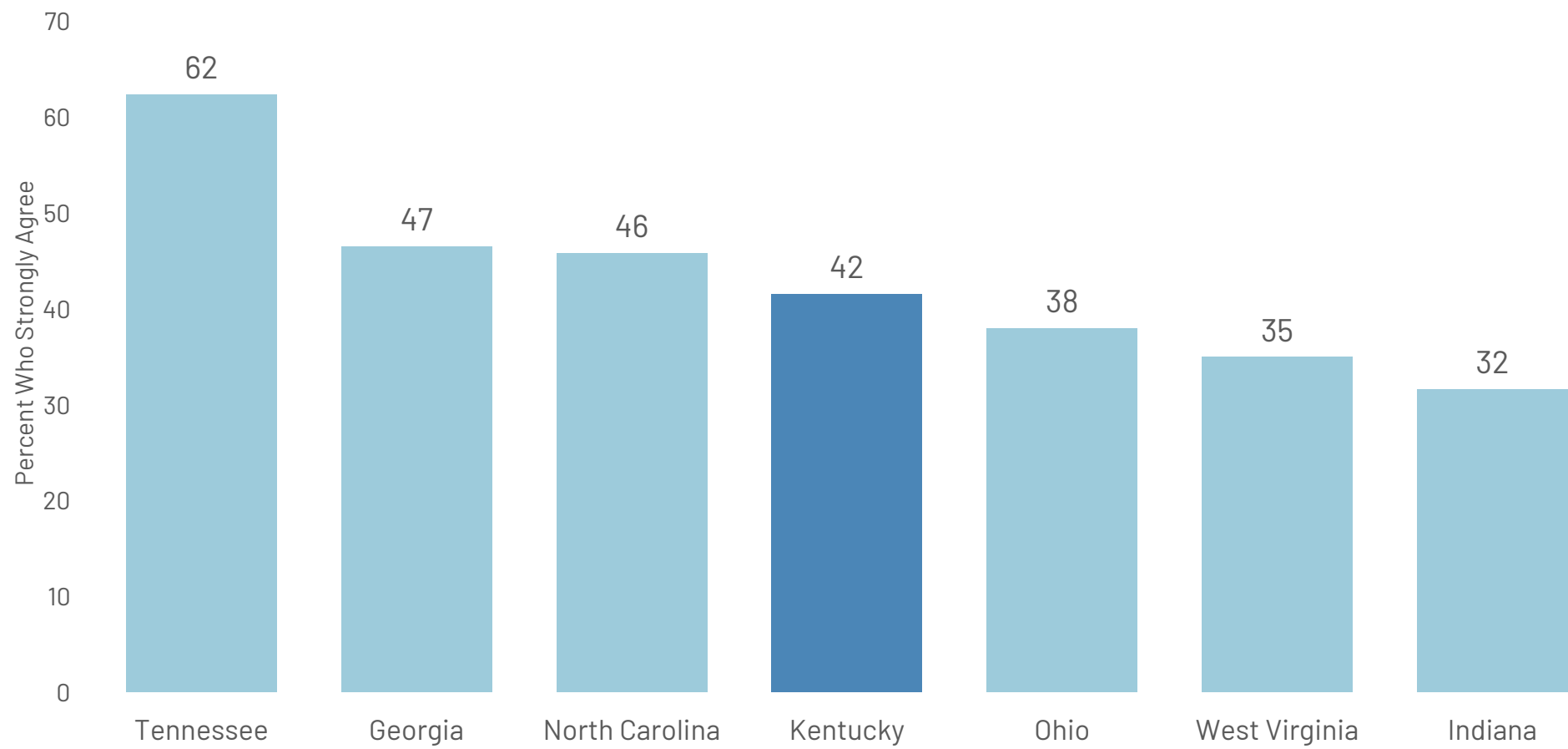
Competitors*

44

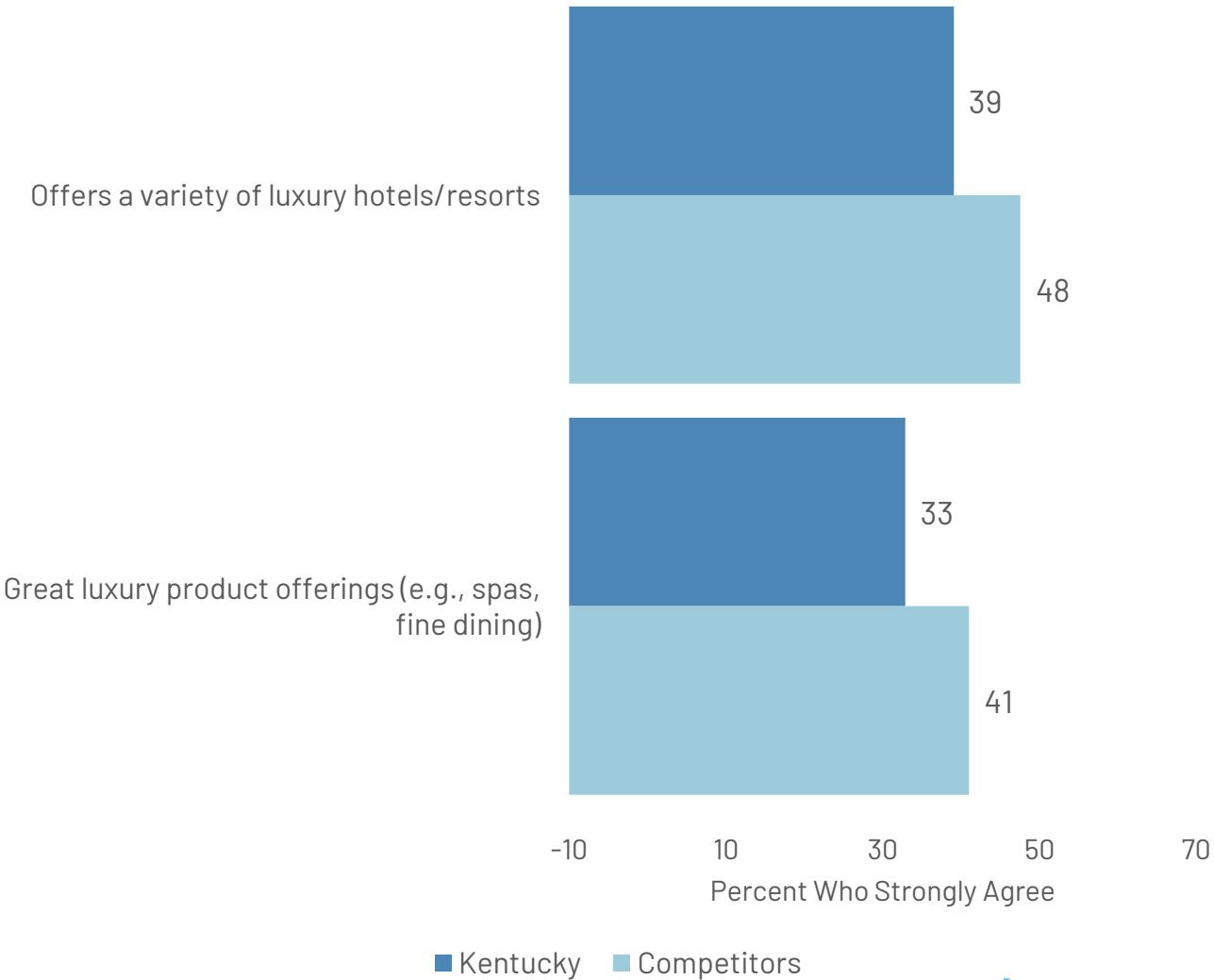
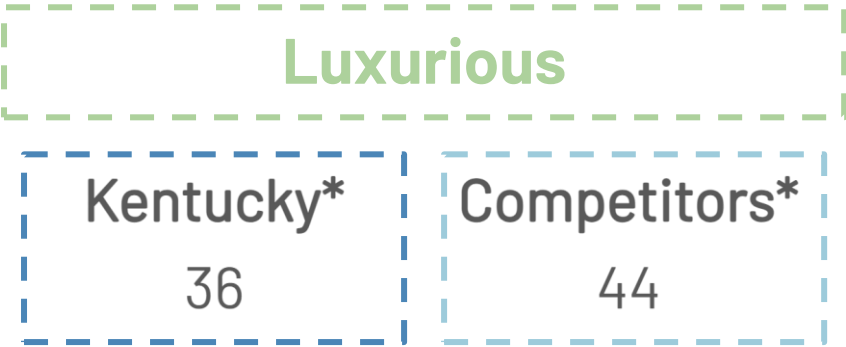
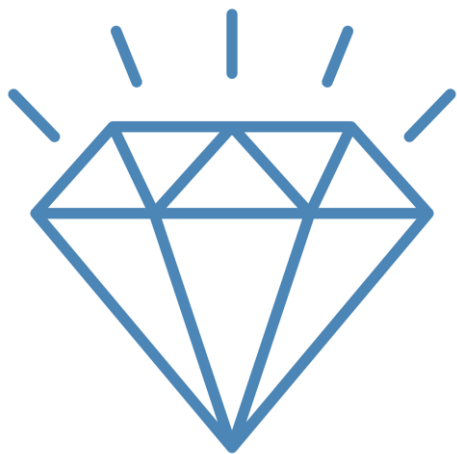


*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - ENTERTAINMENT

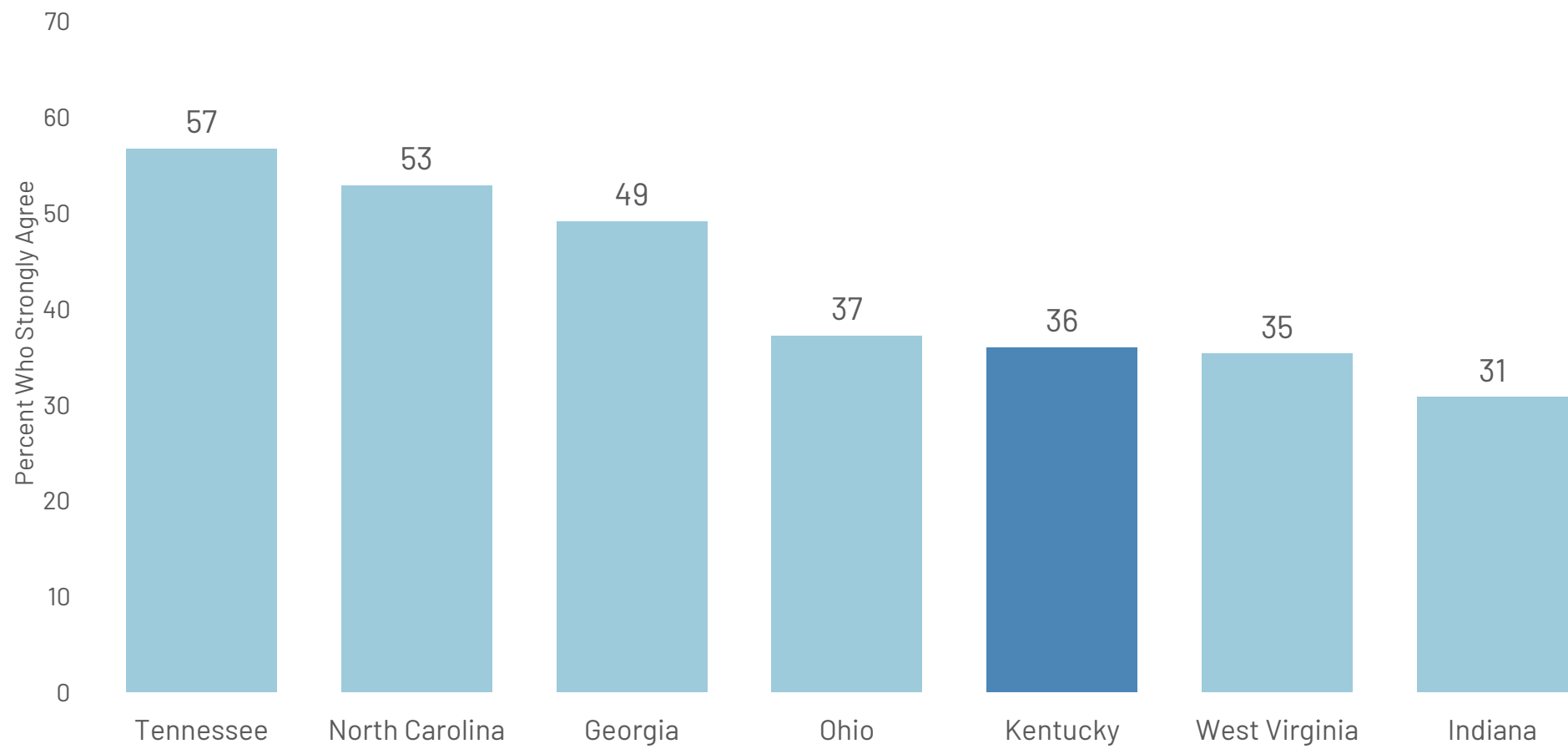


DESTINATION IMAGE VS. COMPETITION - LUXURIOUS



*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - LUXURIOUS



DESTINATION IMAGE VS. COMPETITION – SPORTS AND RECREATION



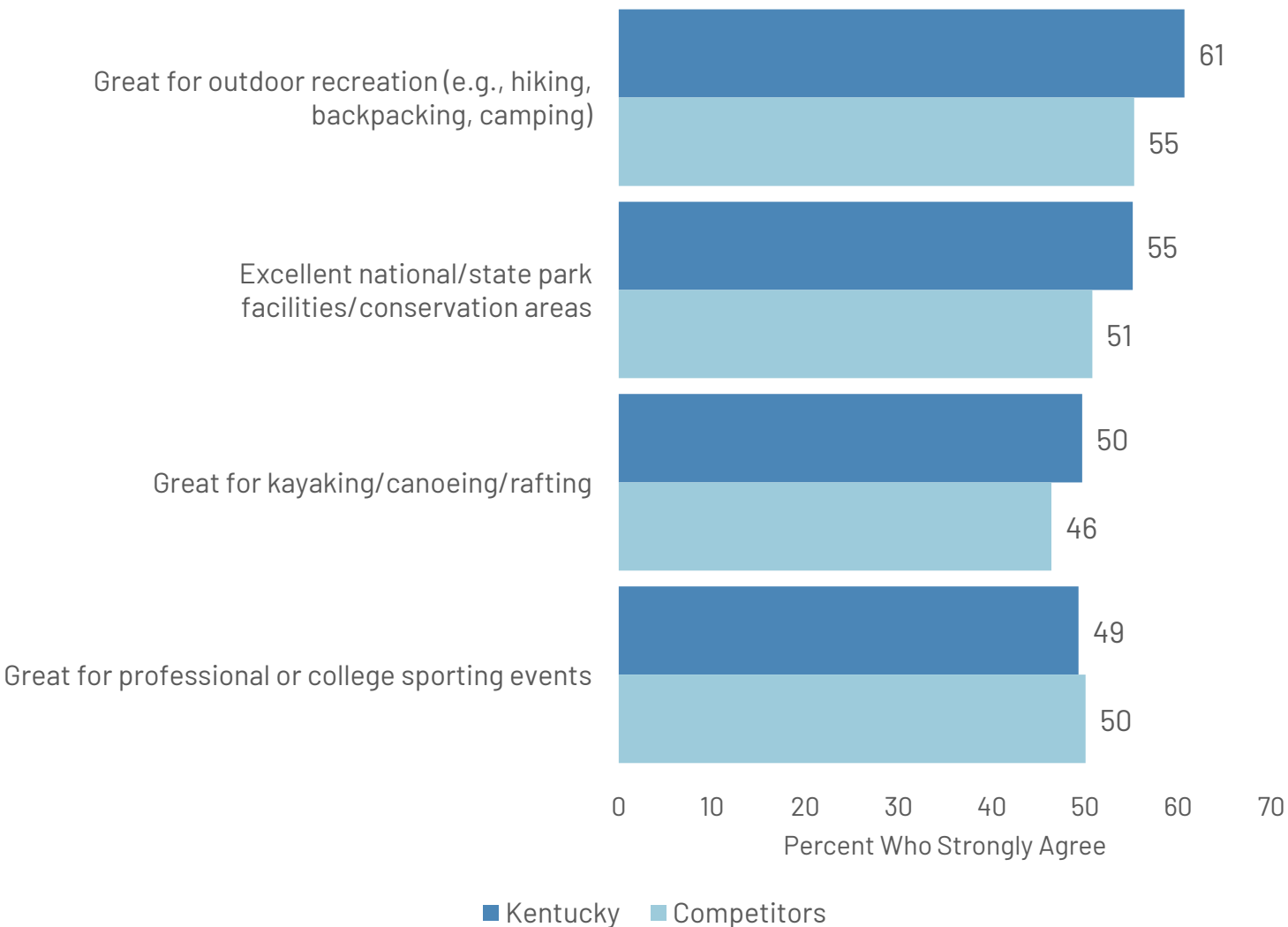
Sports and Recreation

Kentucky*

54

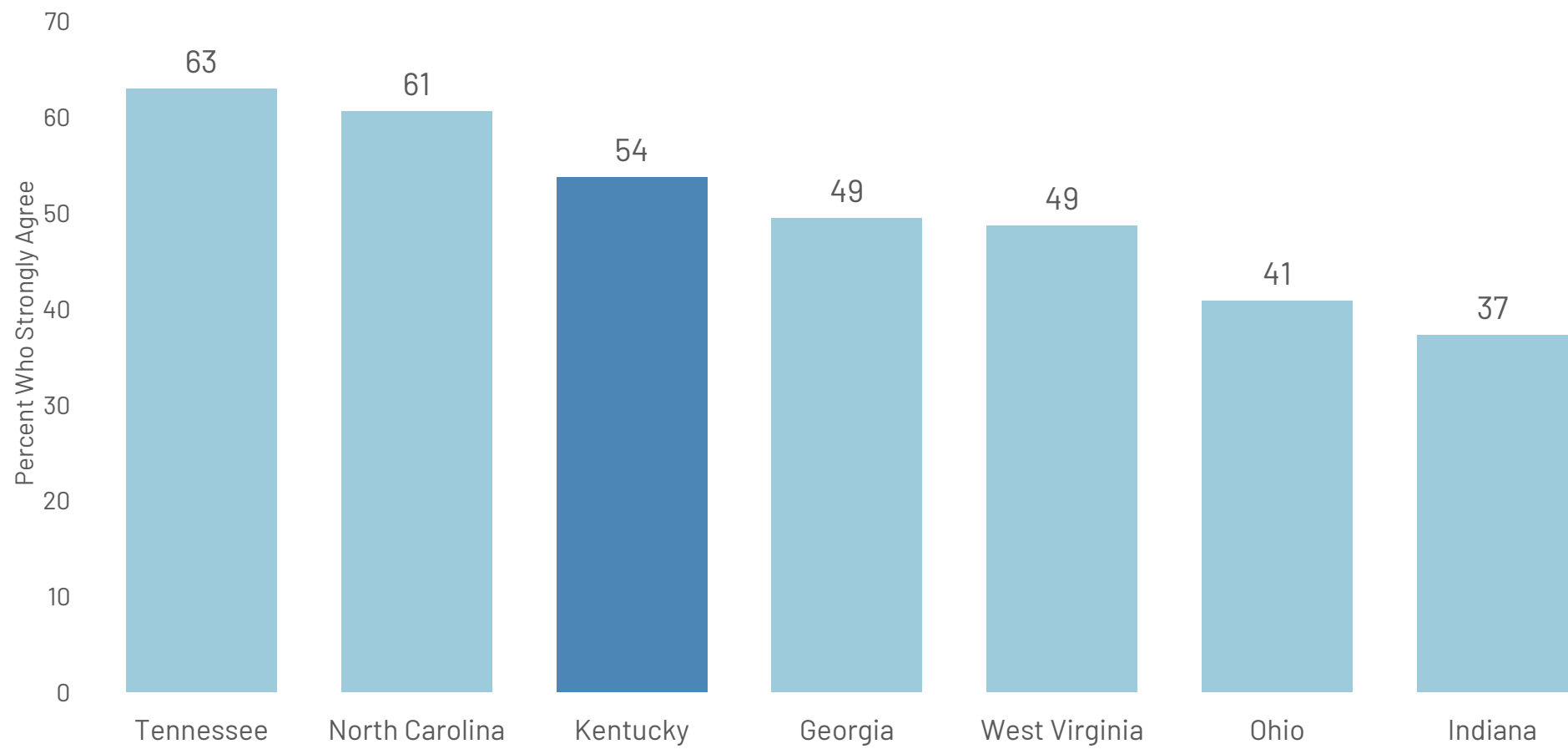
Competitors*

51



*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION – SPORTS AND RECREATION



DESTINATION IMAGE VS. COMPETITION - AFFORDABLE



Affordable

Kentucky*

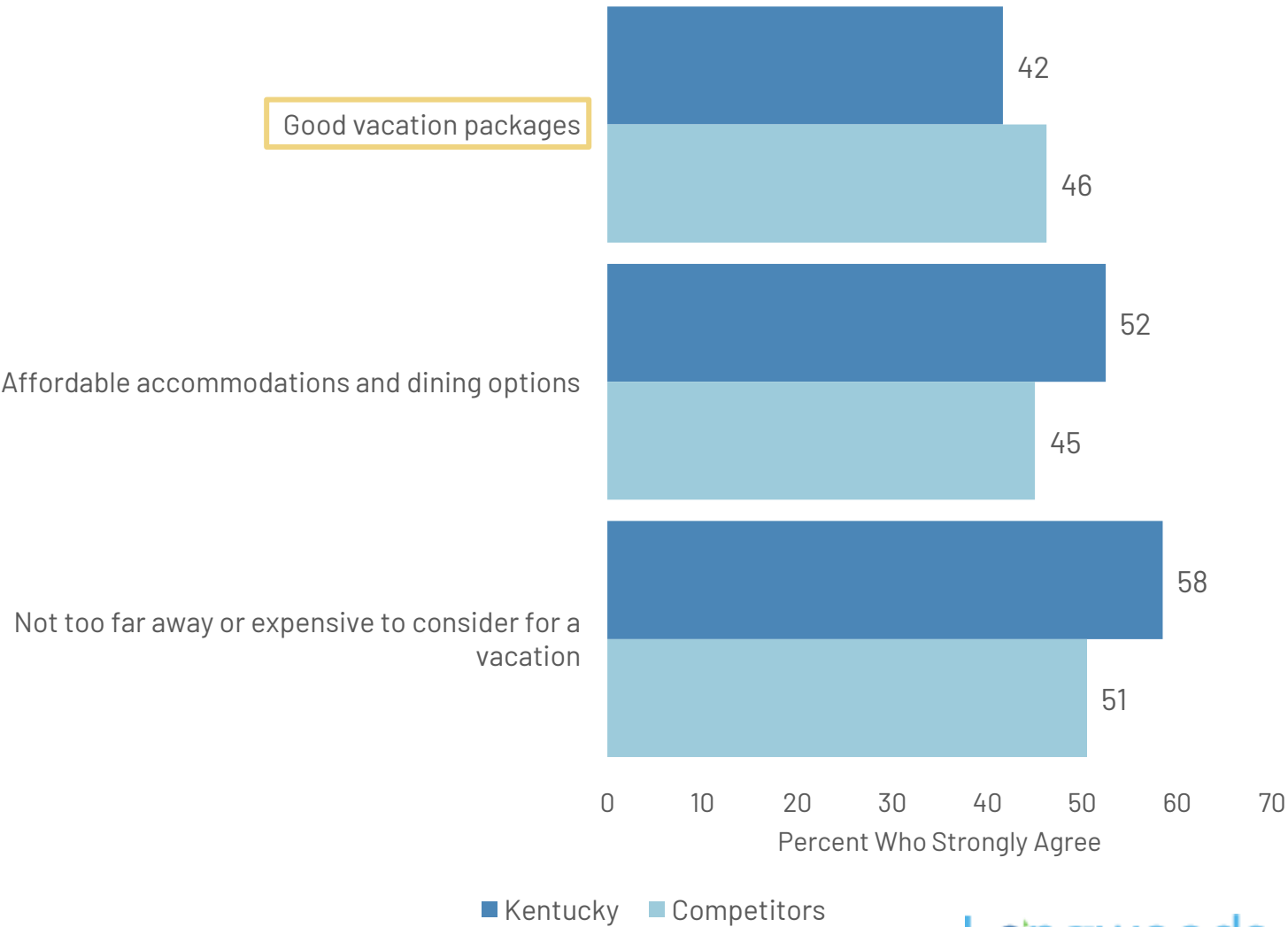
51

Competitors*

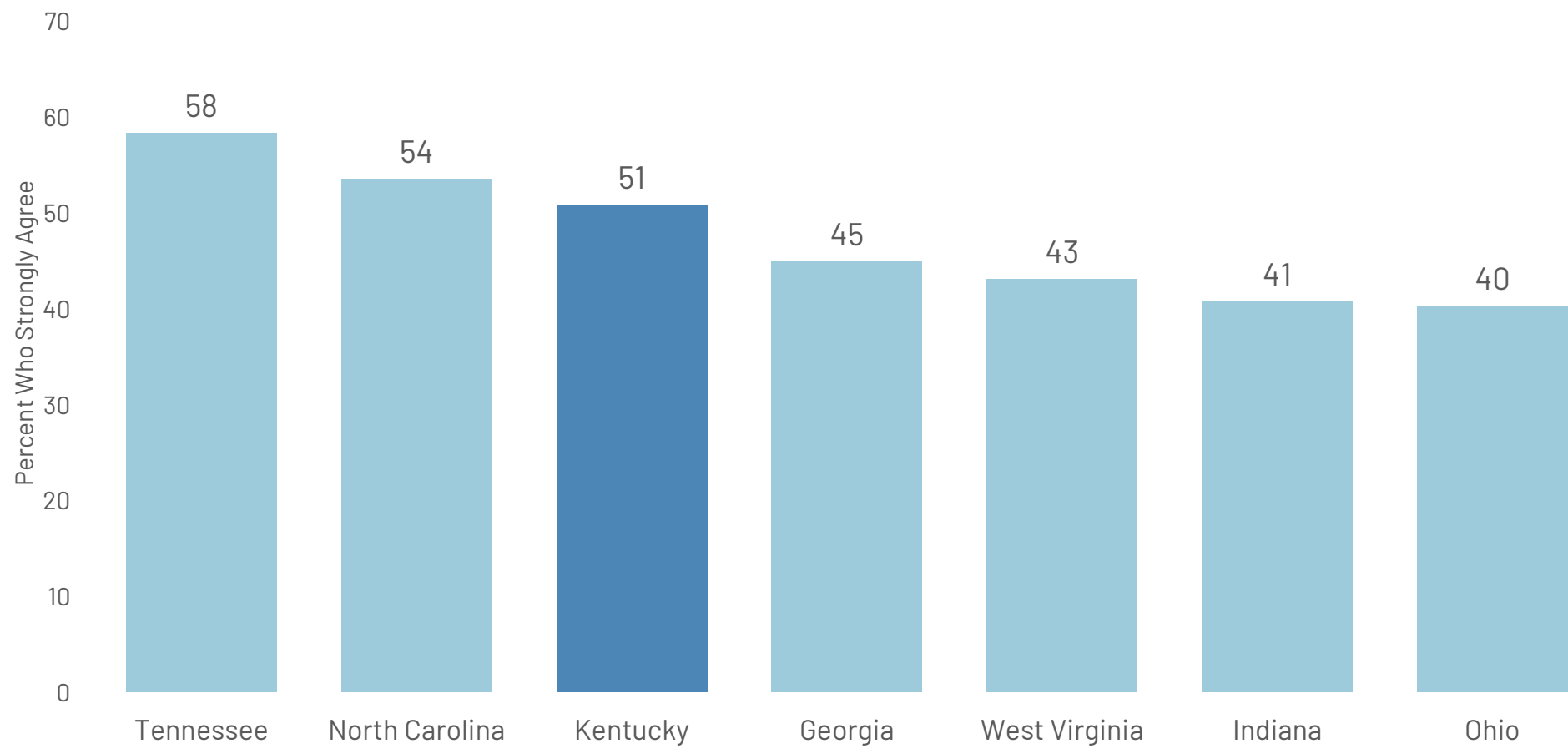
47

Hot Button

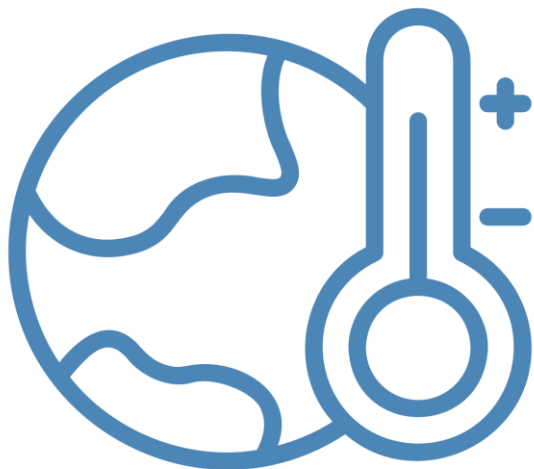
*Percent who strongly agree
Base: Existing Markets



DESTINATION IMAGE VS. COMPETITION – AFFORDABLE



DESTINATION IMAGE VS. COMPETITION - CLIMATE



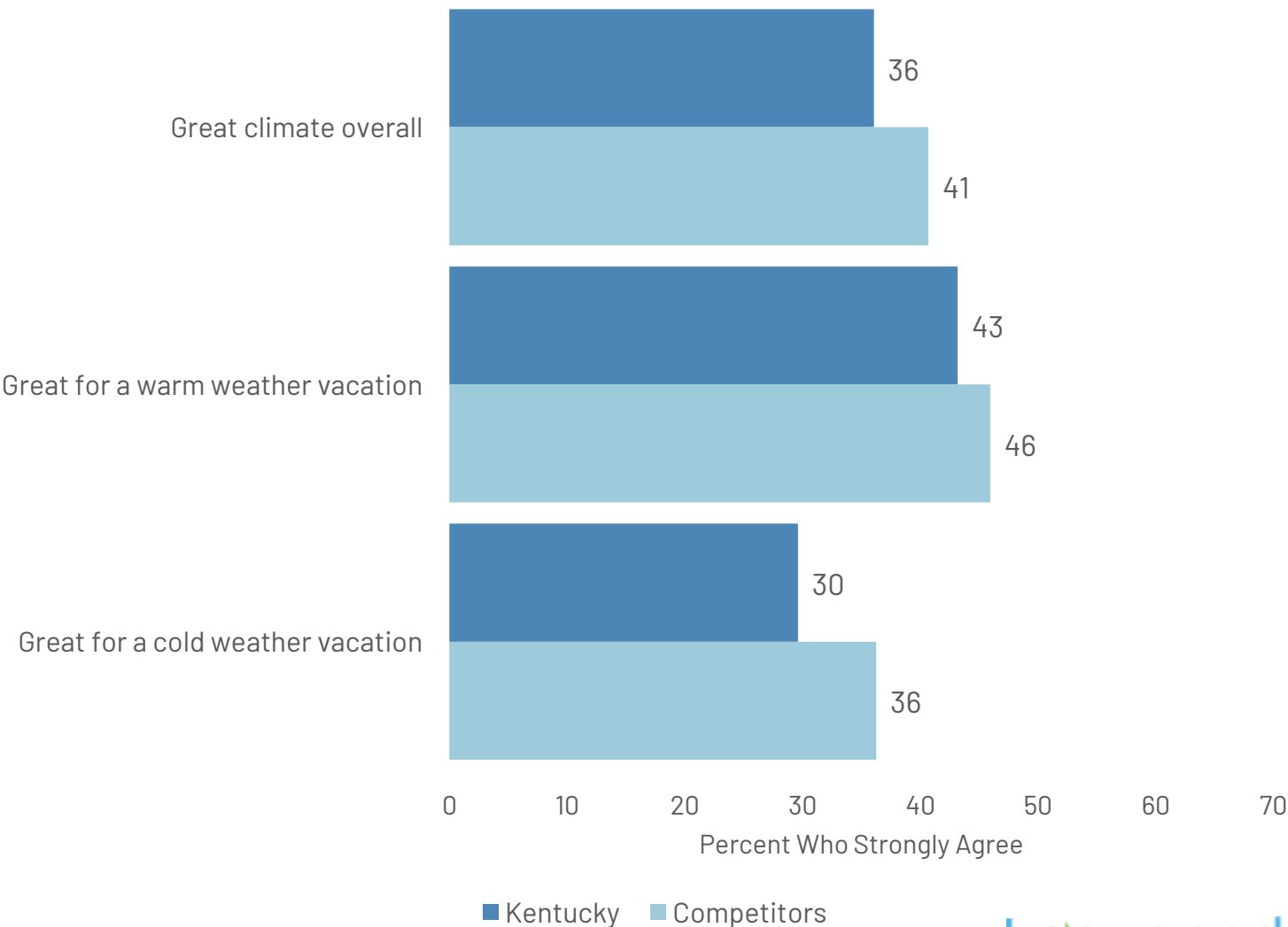
Climate

Kentucky*

36

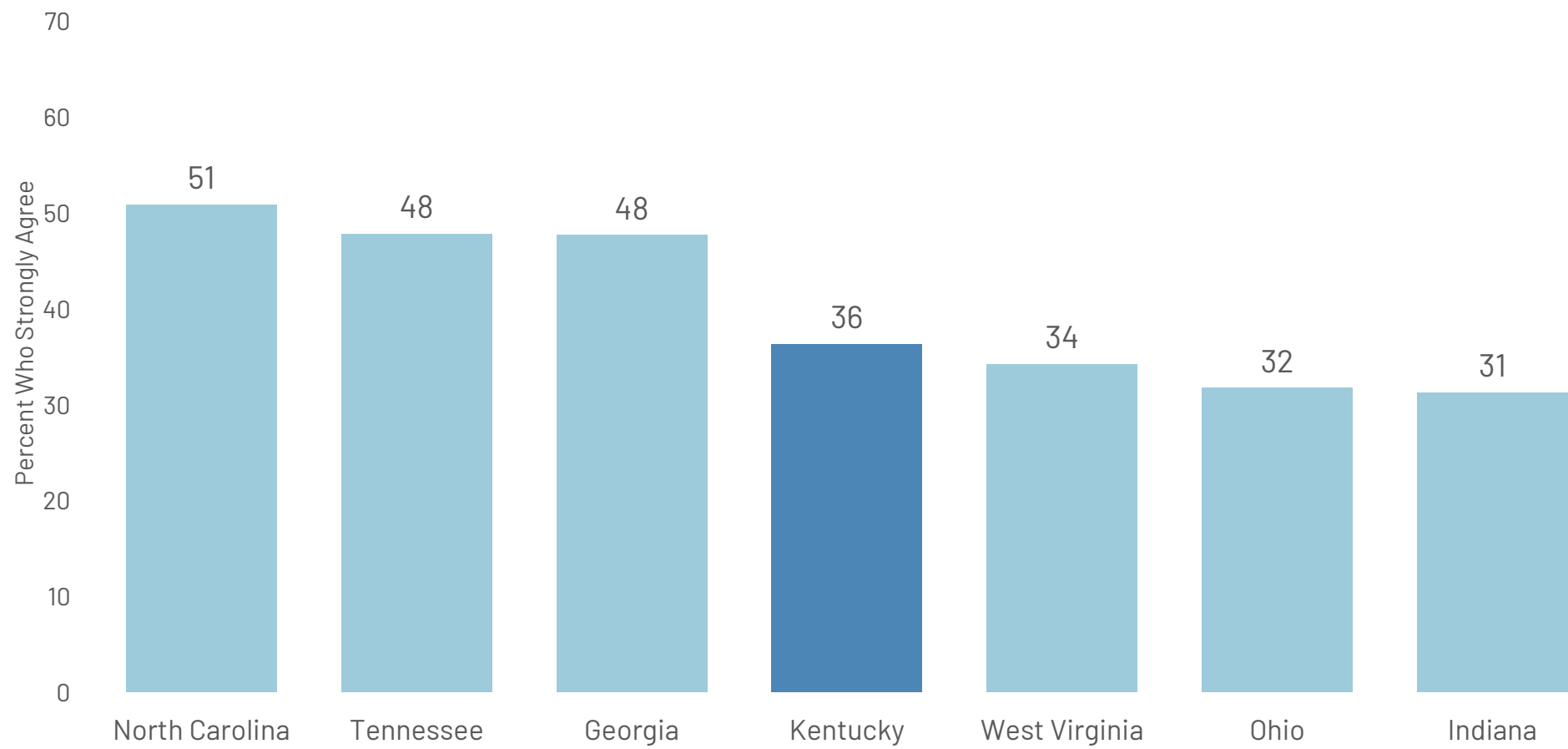
Competitors*

41



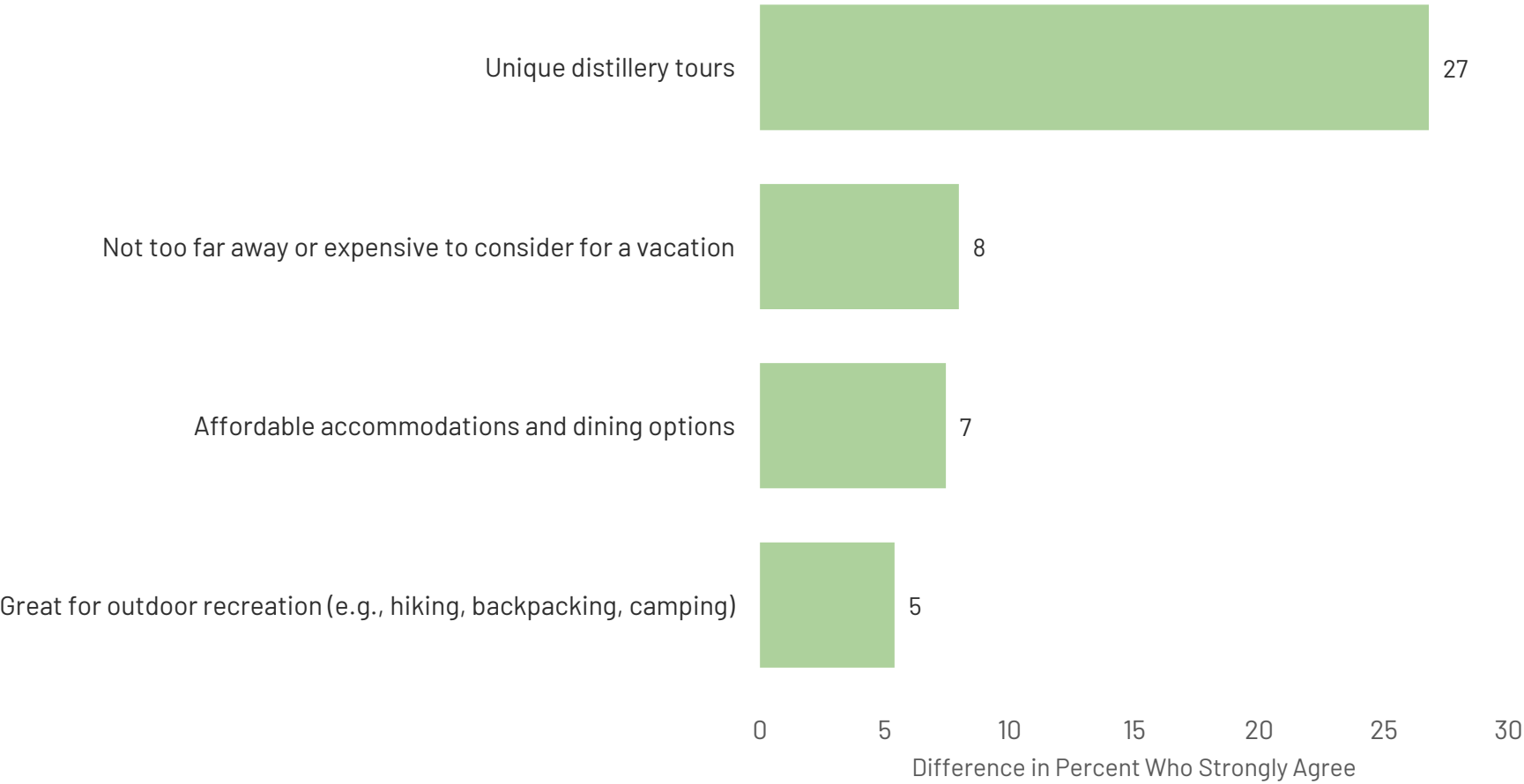
*Percent who strongly agree
Base: Existing Markets

DESTINATION IMAGE VS. COMPETITION - CLIMATE

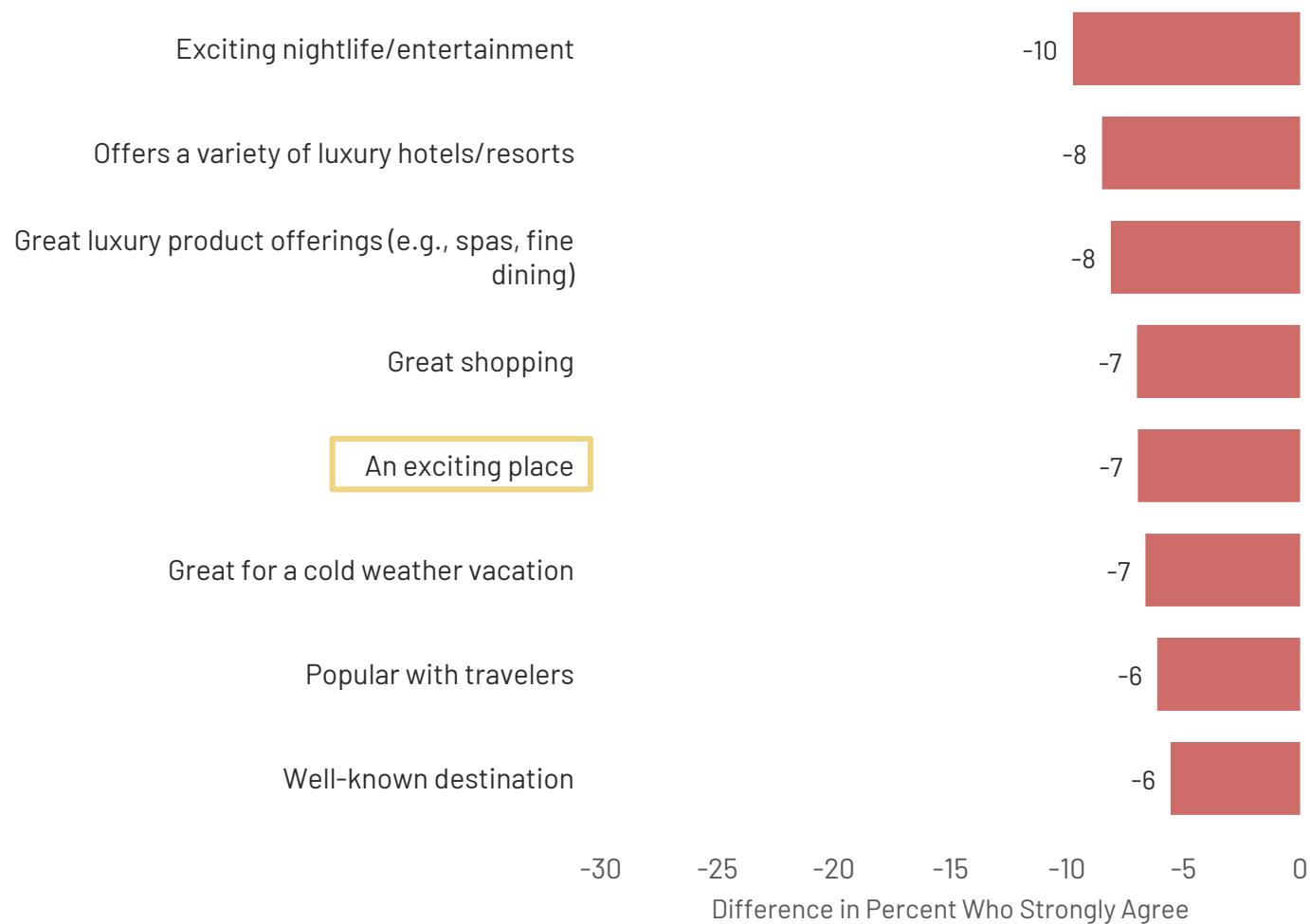


DESTINATION IMAGE STRENGTHS VS. COMPETITION

"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky vs. The Total Competitive Set.**



DESTINATION IMAGE WEAKNESSES VS. COMPETITION



Kentucky underperforms for the eight perceptions & attributes in the adjacent graph versus its combined competitive set.

Hot Button

Base: Existing Markets



["HALO EFFECT" ON ECONOMIC DEVELOPMENT]



WHAT IS THE "HALO EFFECT"?

THE "HALO EFFECT"

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.

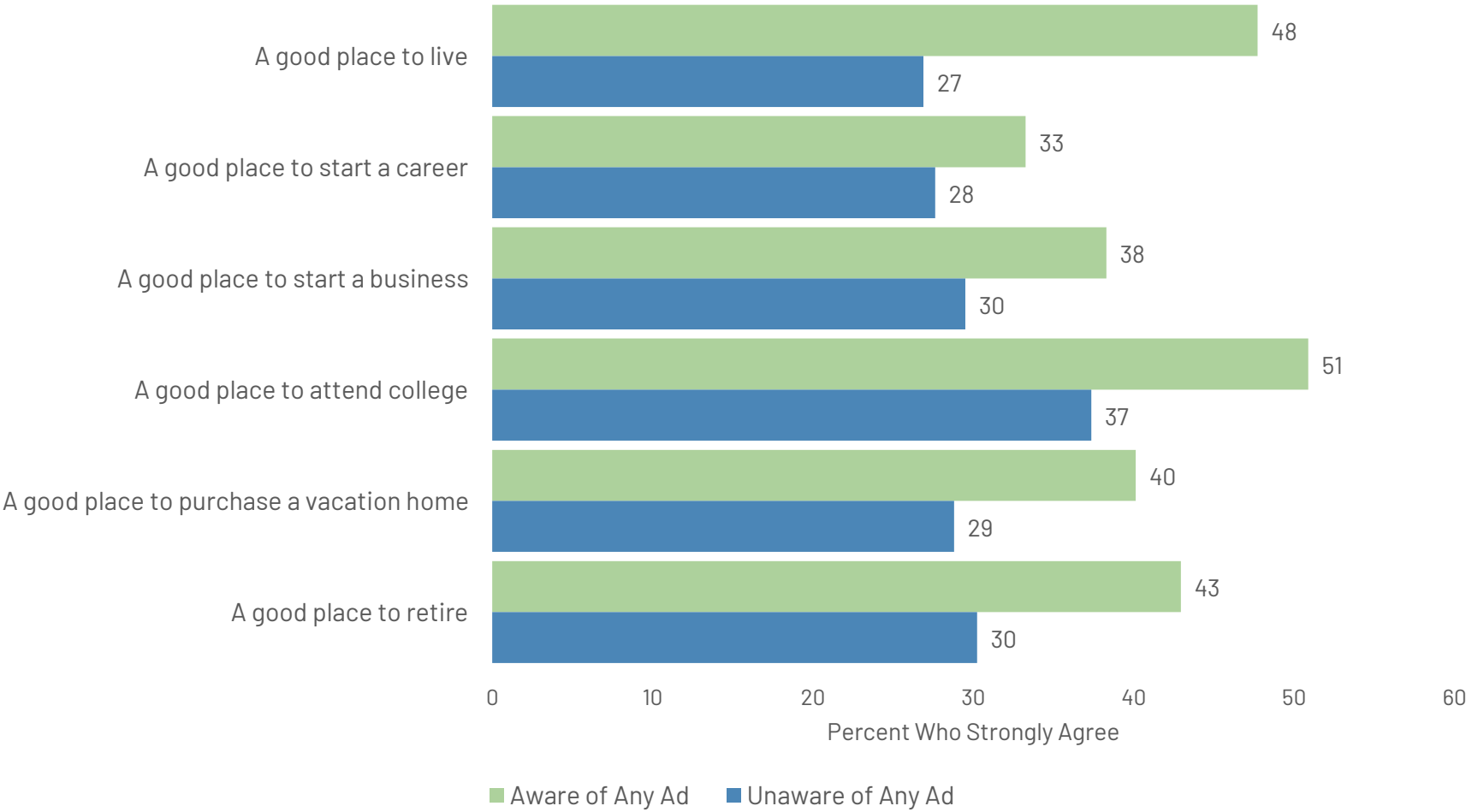
Applying the psychological concept of the **"halo effect"** to tourism promotion advertising, Longwoods set out to determine if gains in image for Kentucky from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that **economic objectives could also be achieved**, such as viewing Kentucky more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?



IMPACT OF *TOURISM AD AWARENESS* ON ECONOMIC DEVELOPMENT

In the first Halo Effect data analysis, Longwoods compared the percentage of Existing advertising market travelers aware of Kentucky's advertising, who strongly agreed with each of the economic development variables, to travelers that were unaware of the campaign.

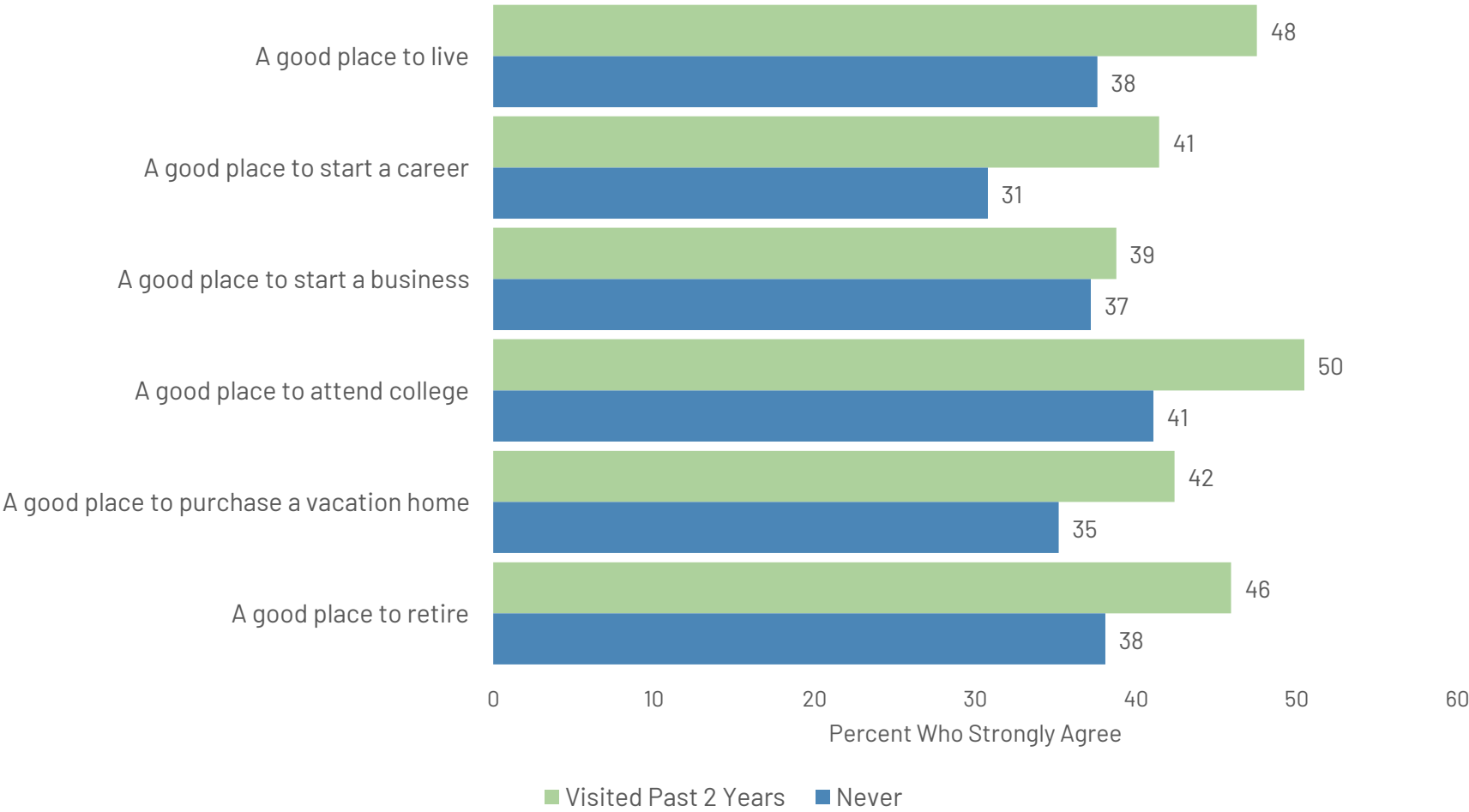
Those who saw the advertising rated Kentucky higher on all the economic development indicators.



IMPACT OF VISITATION ON ECONOMIC DEVELOPMENT

Next, Longwoods compared the percentage of Existing advertising market travelers who have visited the state recently to those who have never visited.

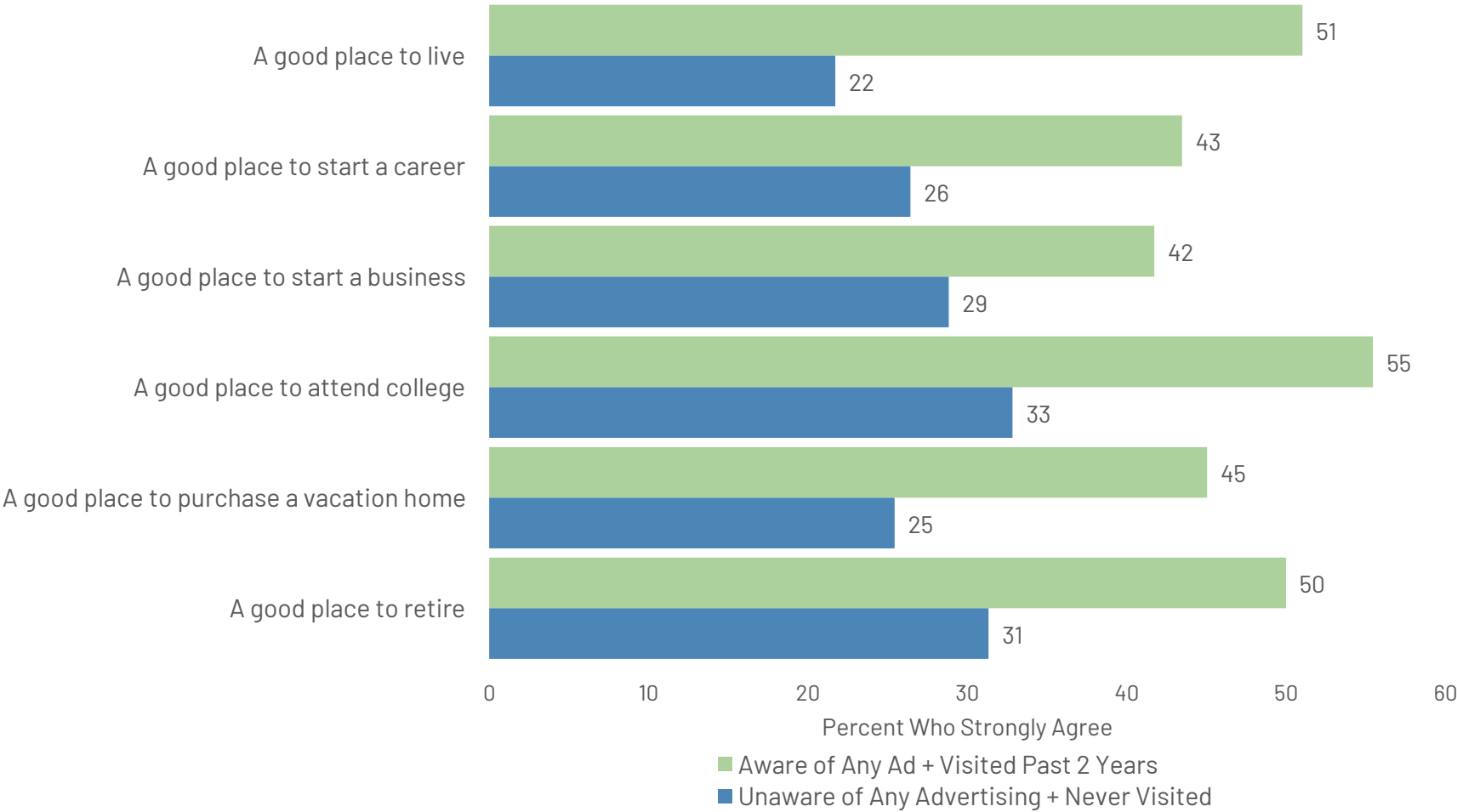
Existing advertising market travelers who visited Kentucky during the past two years rated Kentucky significantly higher than those who have never visited for all economic development attributes except one: *A good place to start a business.*



IMPACT OF AWARENESS + VISITATION ON ECONOMIC DEVELOPMENT

In the final Halo analysis, Longwoods compared the strongly agree results of Existing markets travelers who were both aware of Kentucky's advertising and have visited in the past 2 years to those who were unaware of the campaign and have never visited.

For each economic development objective, the most dramatic improvement in image was among those Existing markets travelers who were both exposed to the advertising campaign message and who also visited Kentucky.





APPENDIX: DESTINATION IMAGE
STRENGTHS AND WEAKNESSES VS. INDIVIDUAL COMPETITION

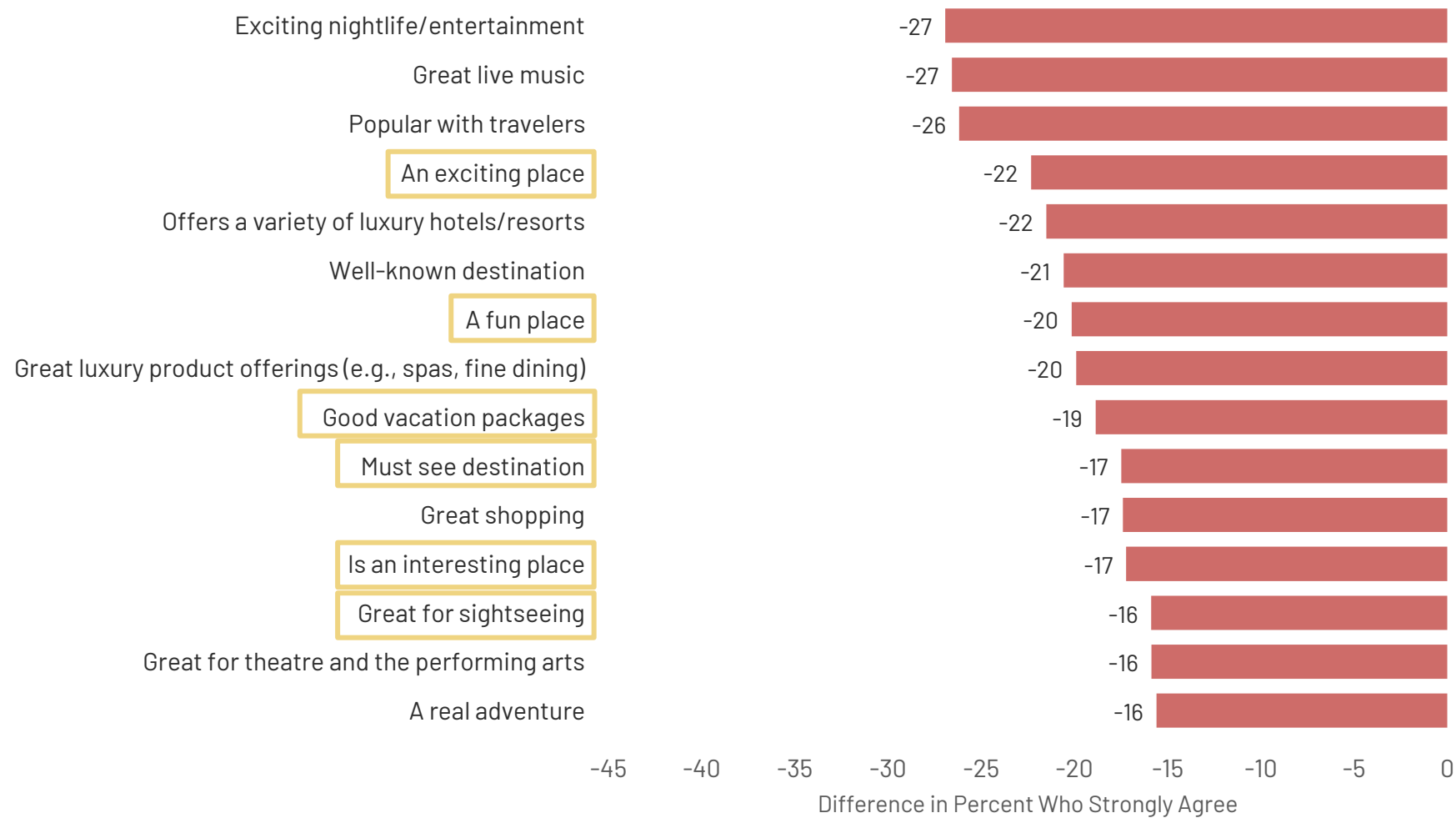




KENTUCKY VS. TENNESSEE:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
TENNESSEE

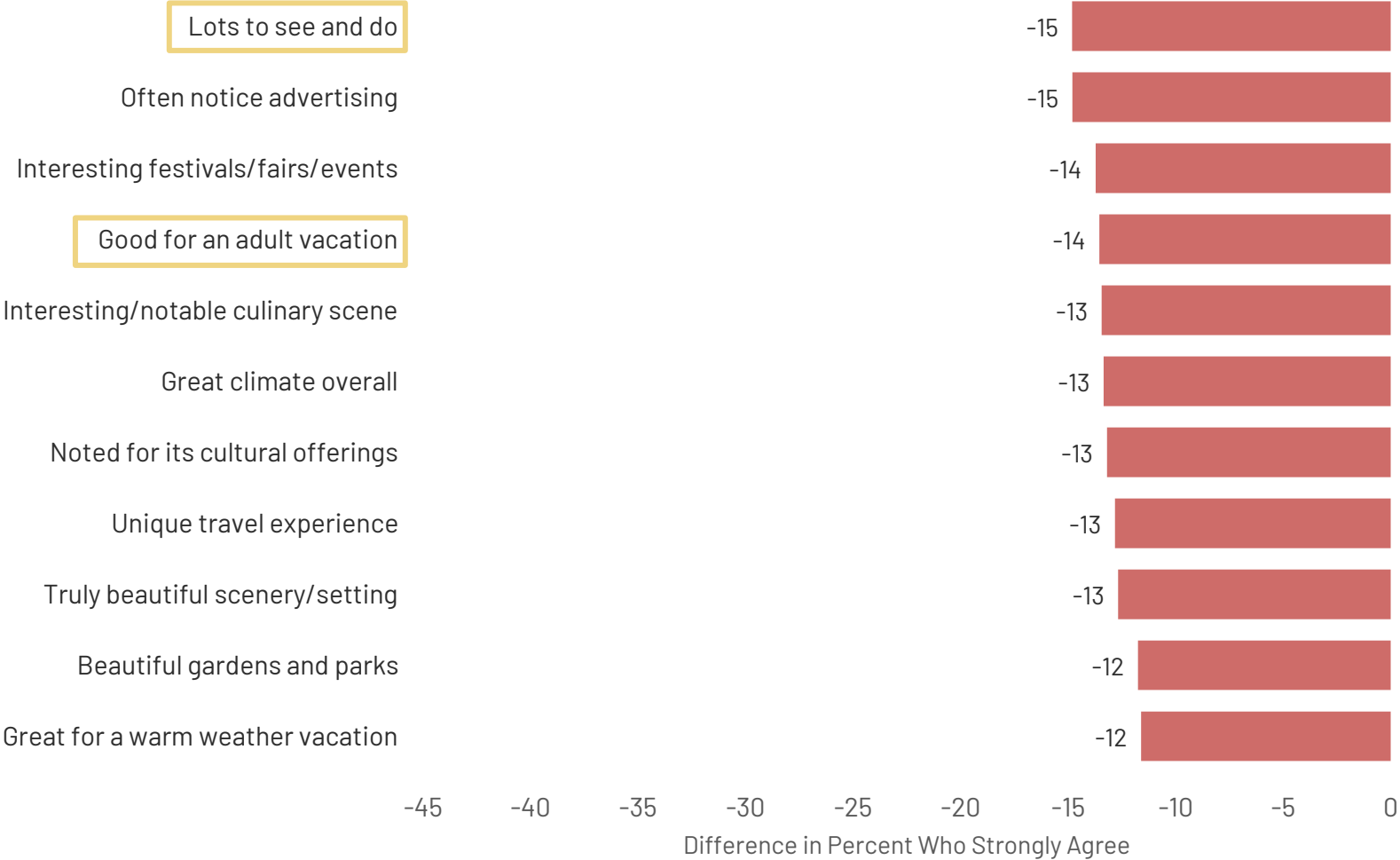
DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



Hot Button

Base: Existing Markets

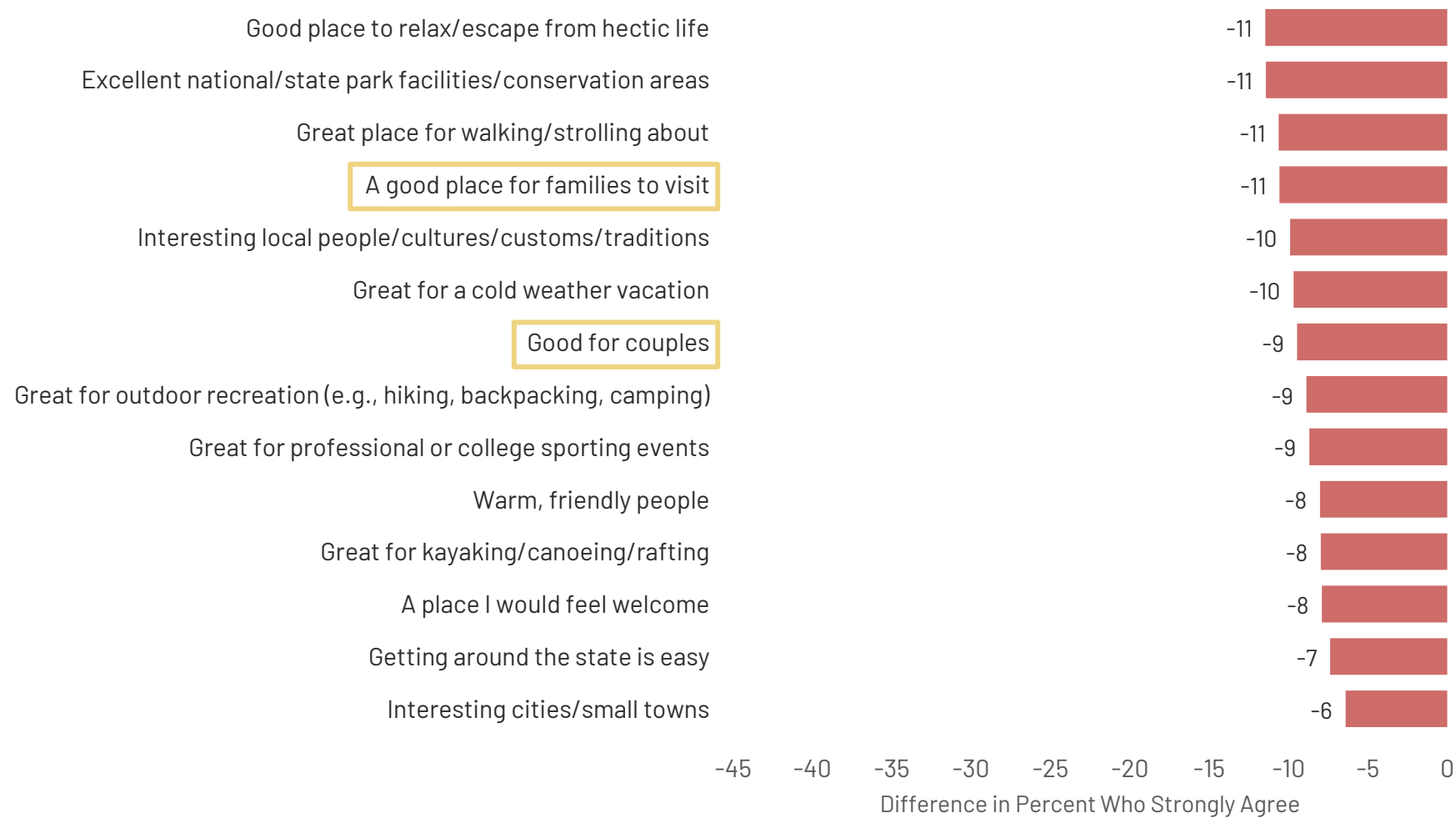
DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



Hot Button

Base: Existing Markets

DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



Hot Button

Base: Existing Markets



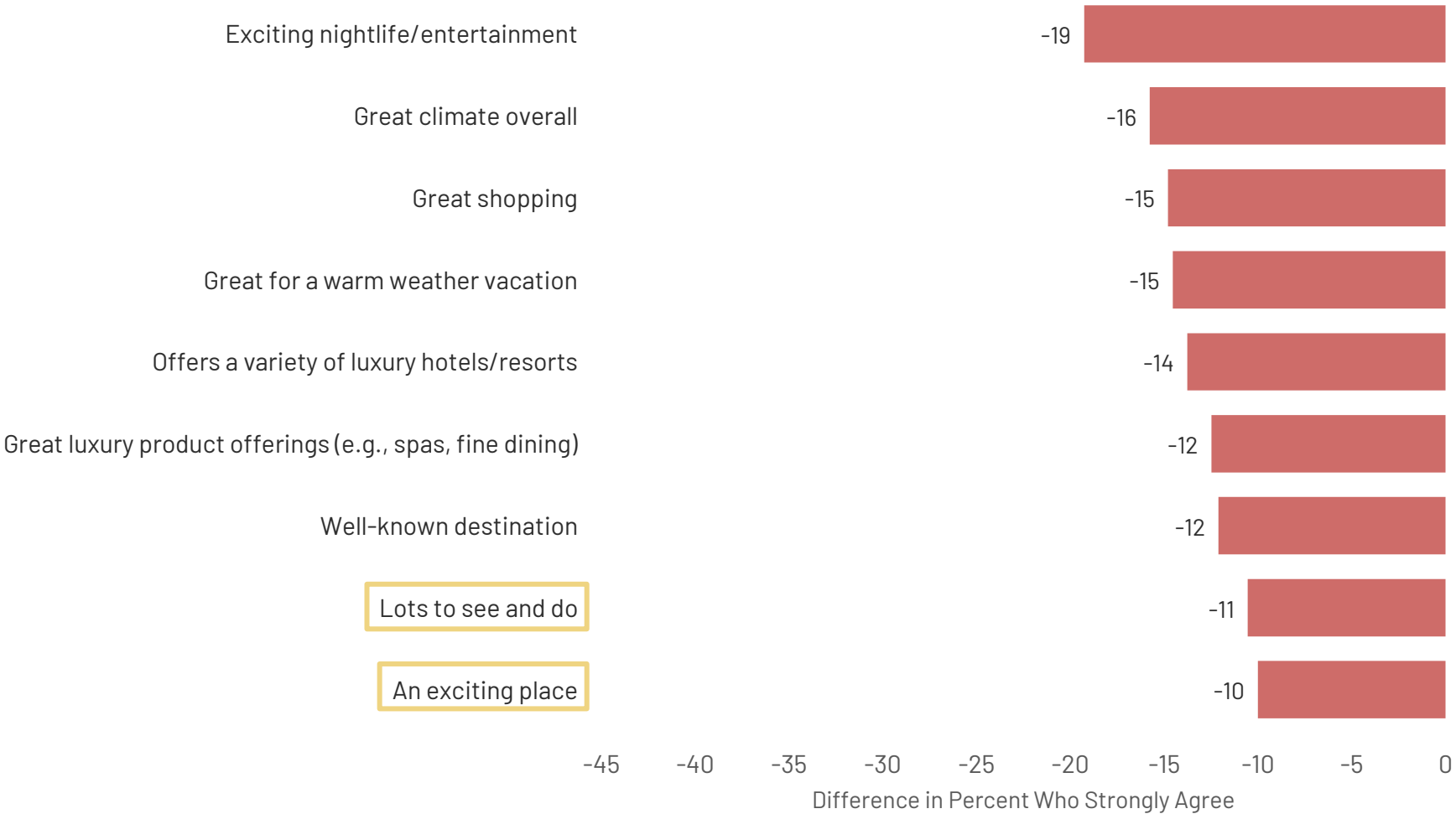
KENTUCKY VS. GEORGIA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. GEORGIA

"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **Georgia**.



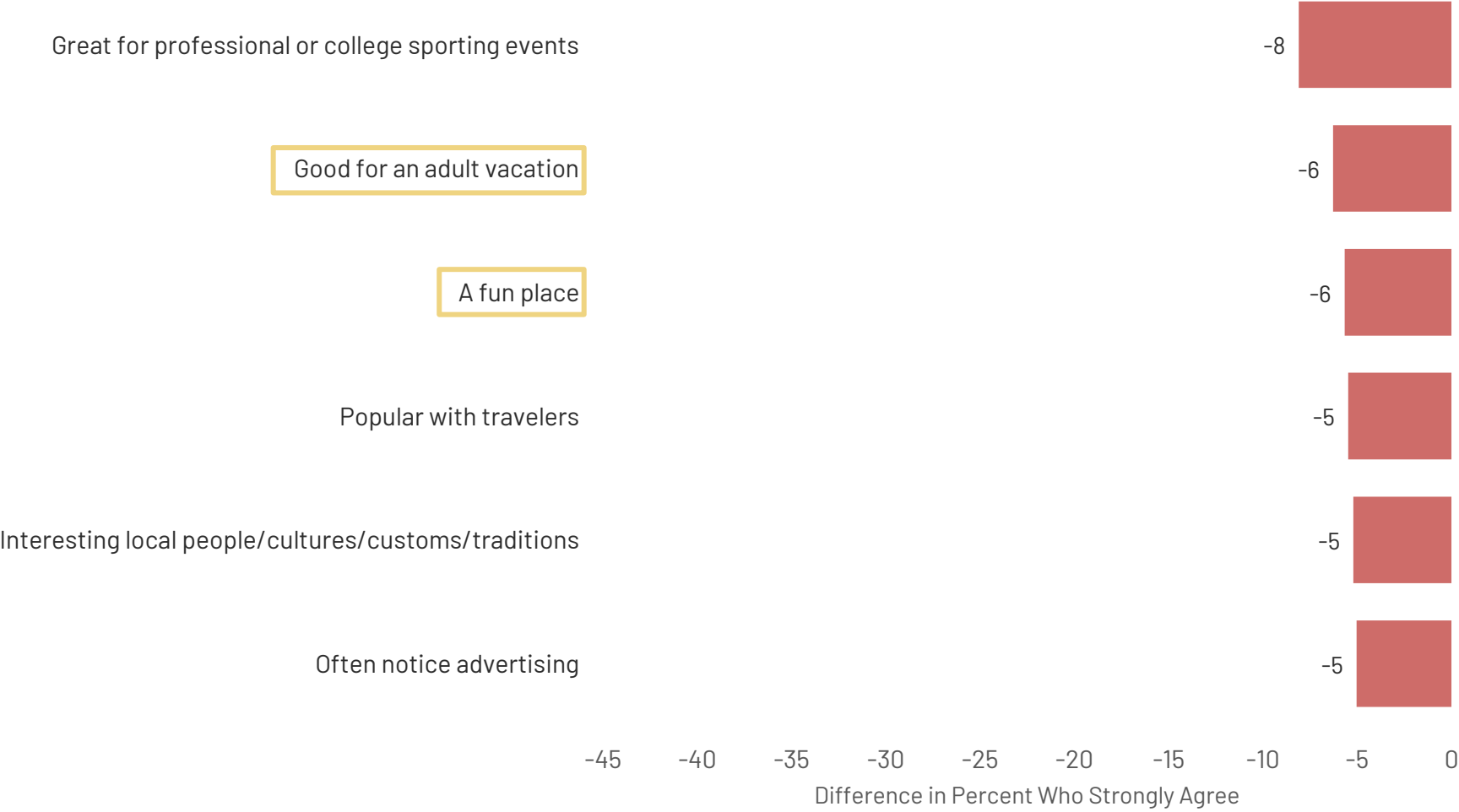
DESTINATION IMAGE WEAKNESSES VS. GEORGIA



Hot Button

Base: Existing Markets

DESTINATION IMAGE WEAKNESSES VS. GEORGIA



Hot Button

Base: Existing Markets



KENTUCKY VS. INDIANA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. INDIANA

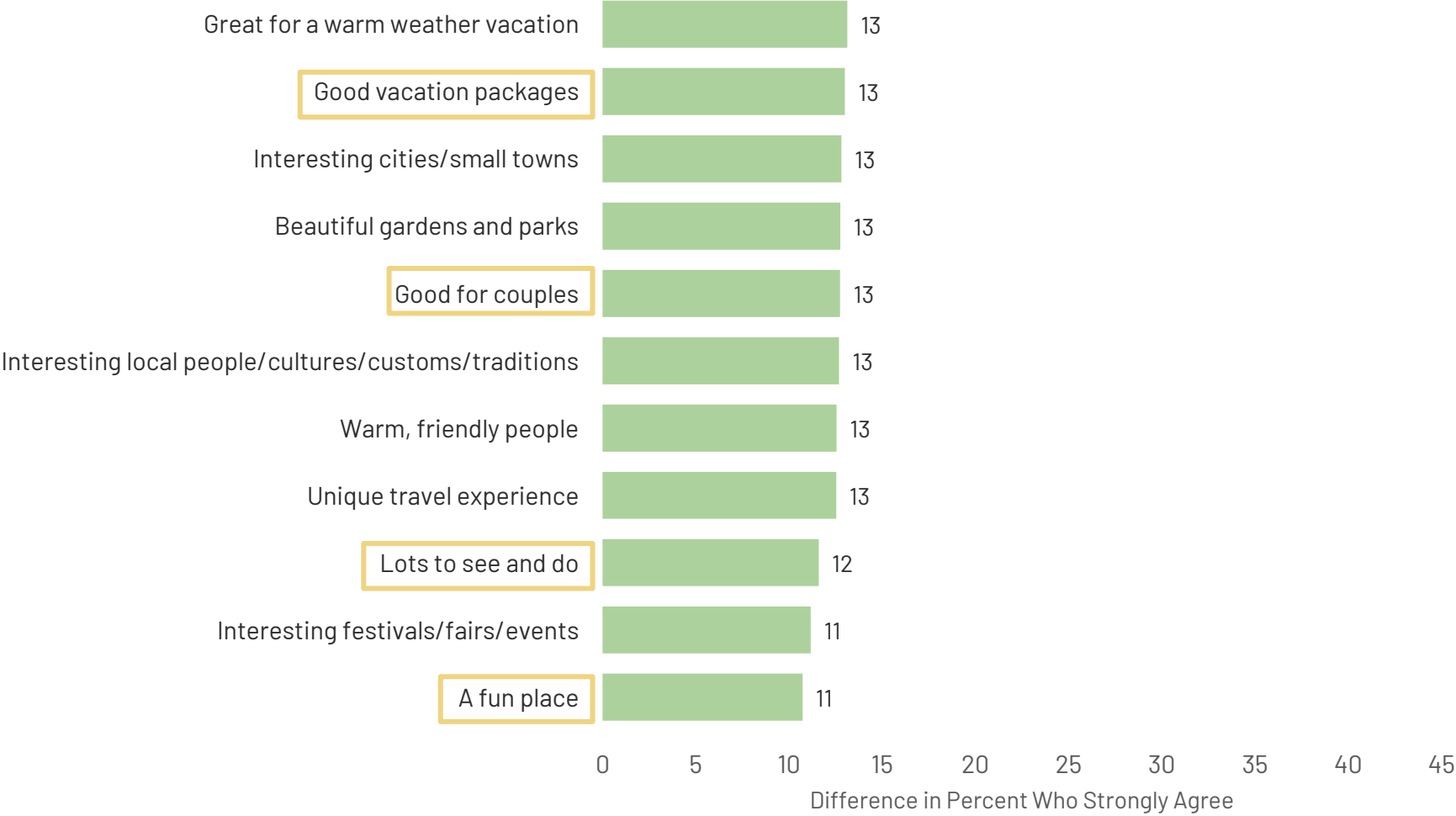
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **Indiana**.



Hot Button

Base: Existing Markets

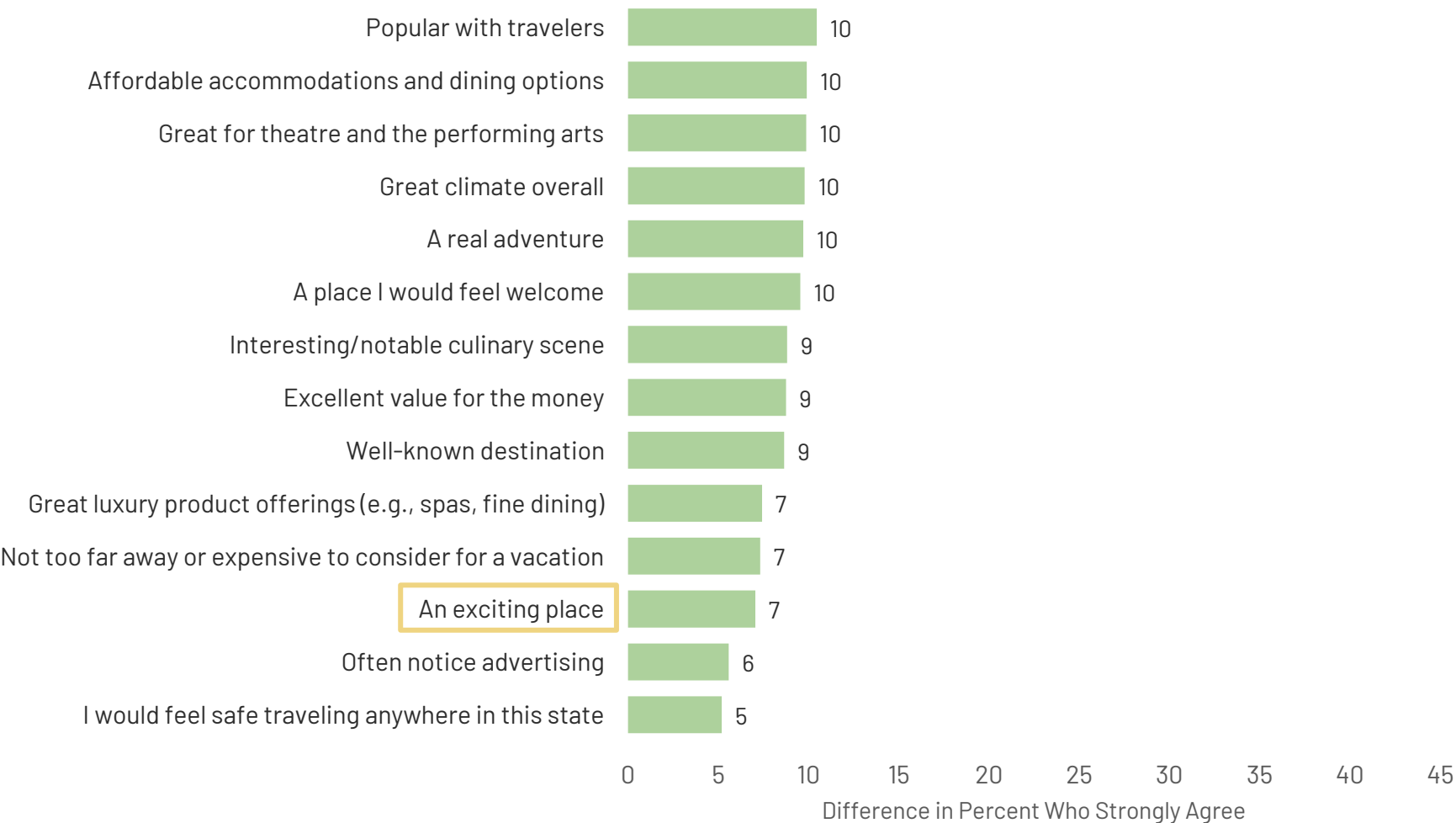
DESTINATION IMAGE STRENGTHS VS. INDIANA



Hot Button

Base: Existing Markets

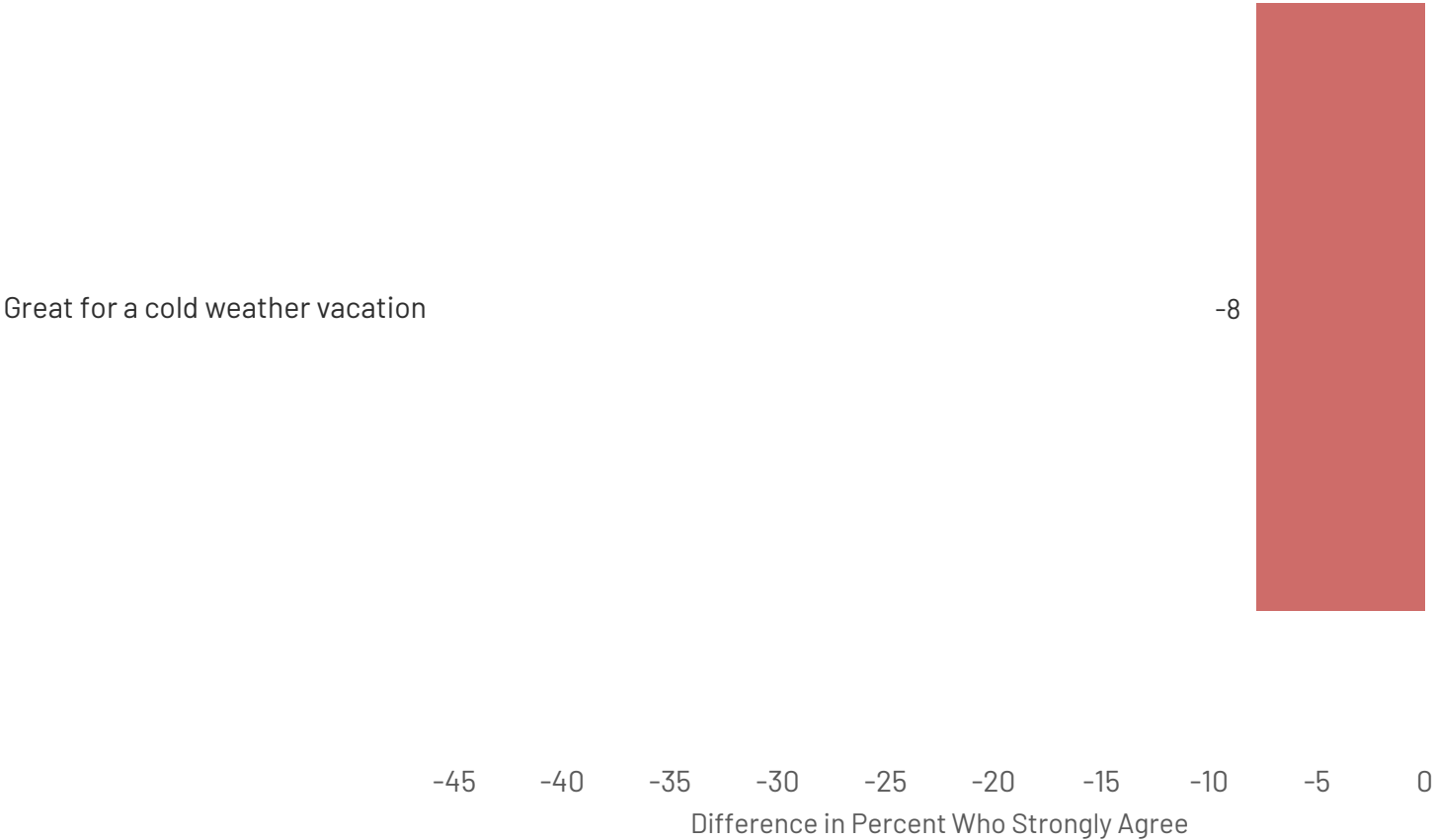
DESTINATION IMAGE STRENGTHS VS. INDIANA



Hot Button

Base: Existing Markets

DESTINATION IMAGE WEAKNESSES VS. INDIANA

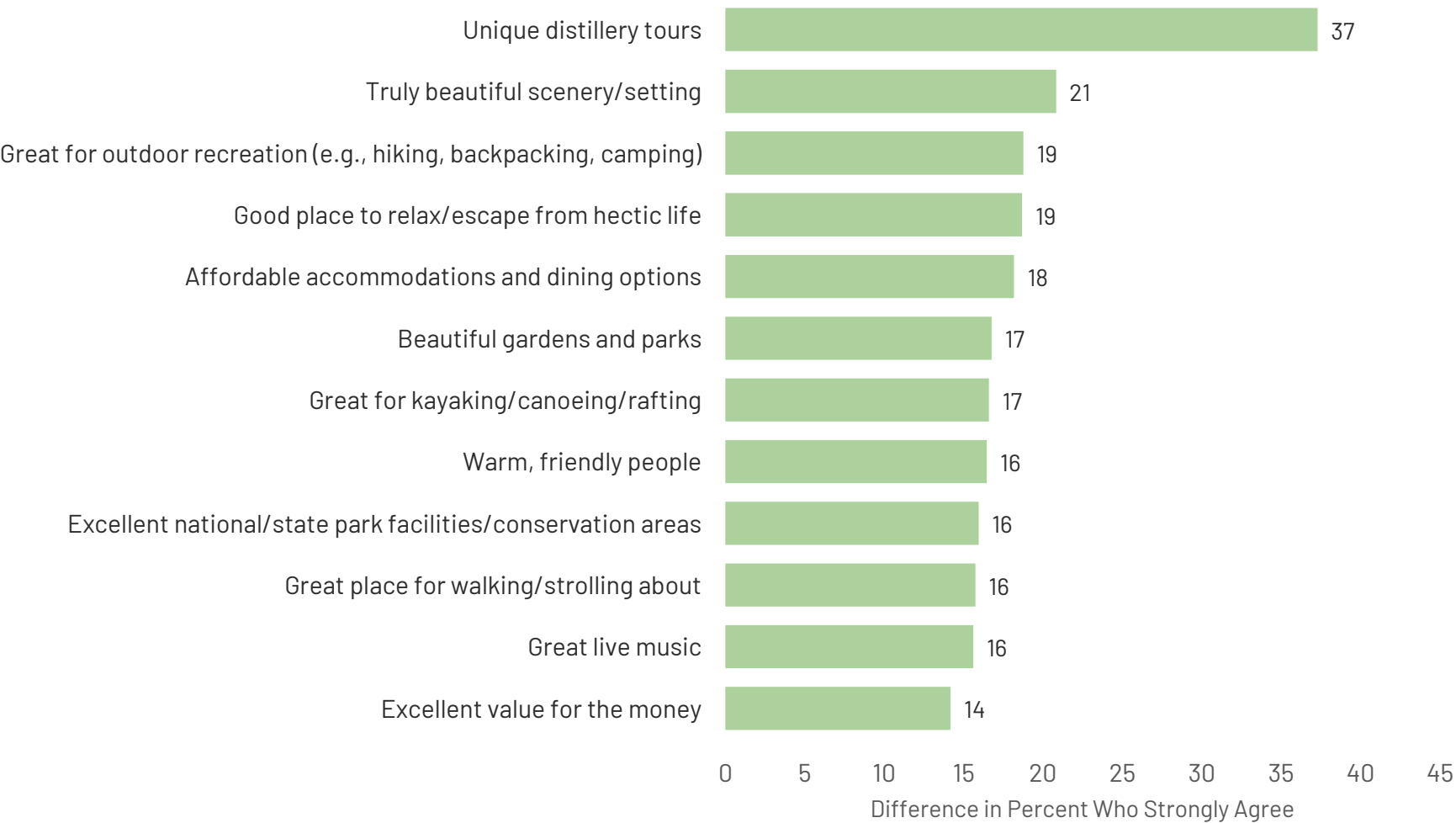




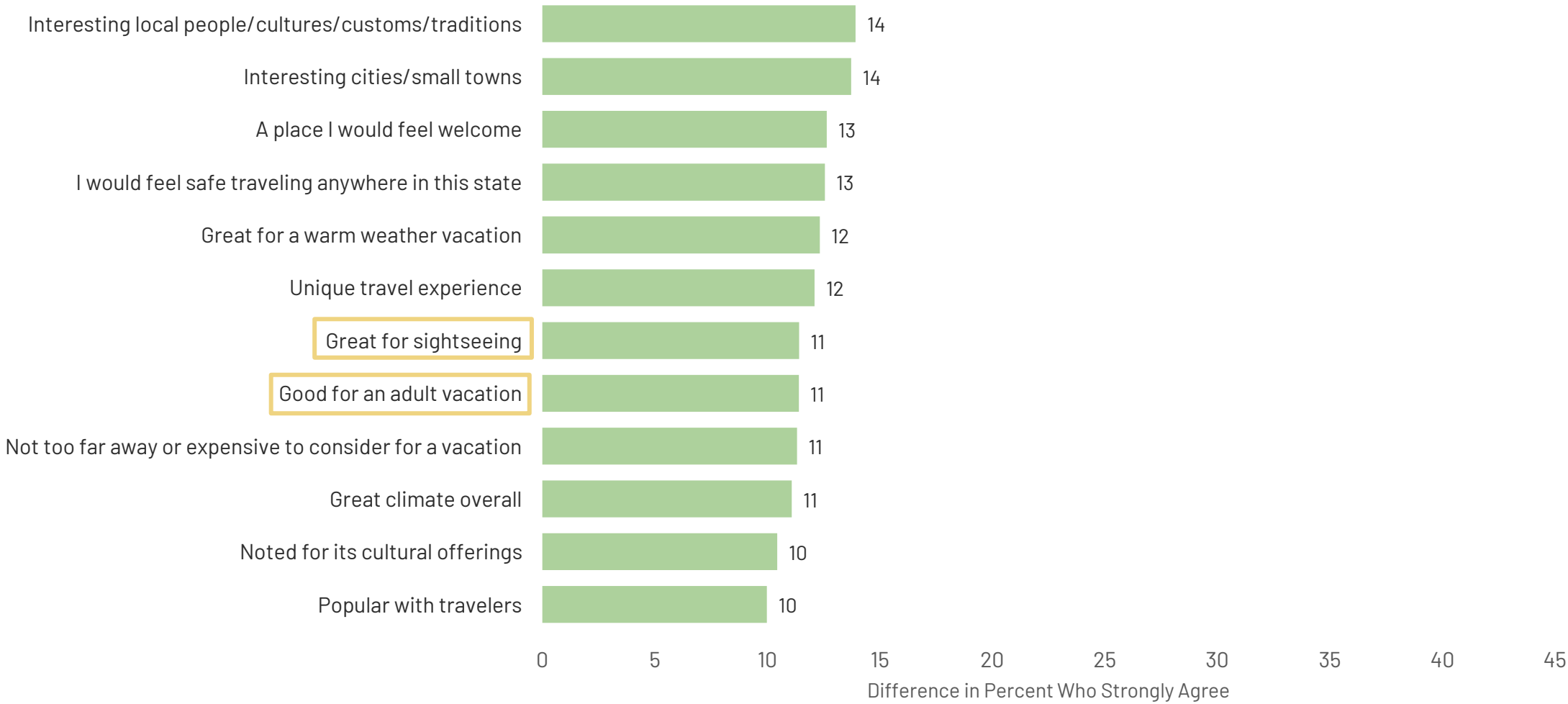
KENTUCKY VS. OHIO:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. OHIO

"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **Ohio**.



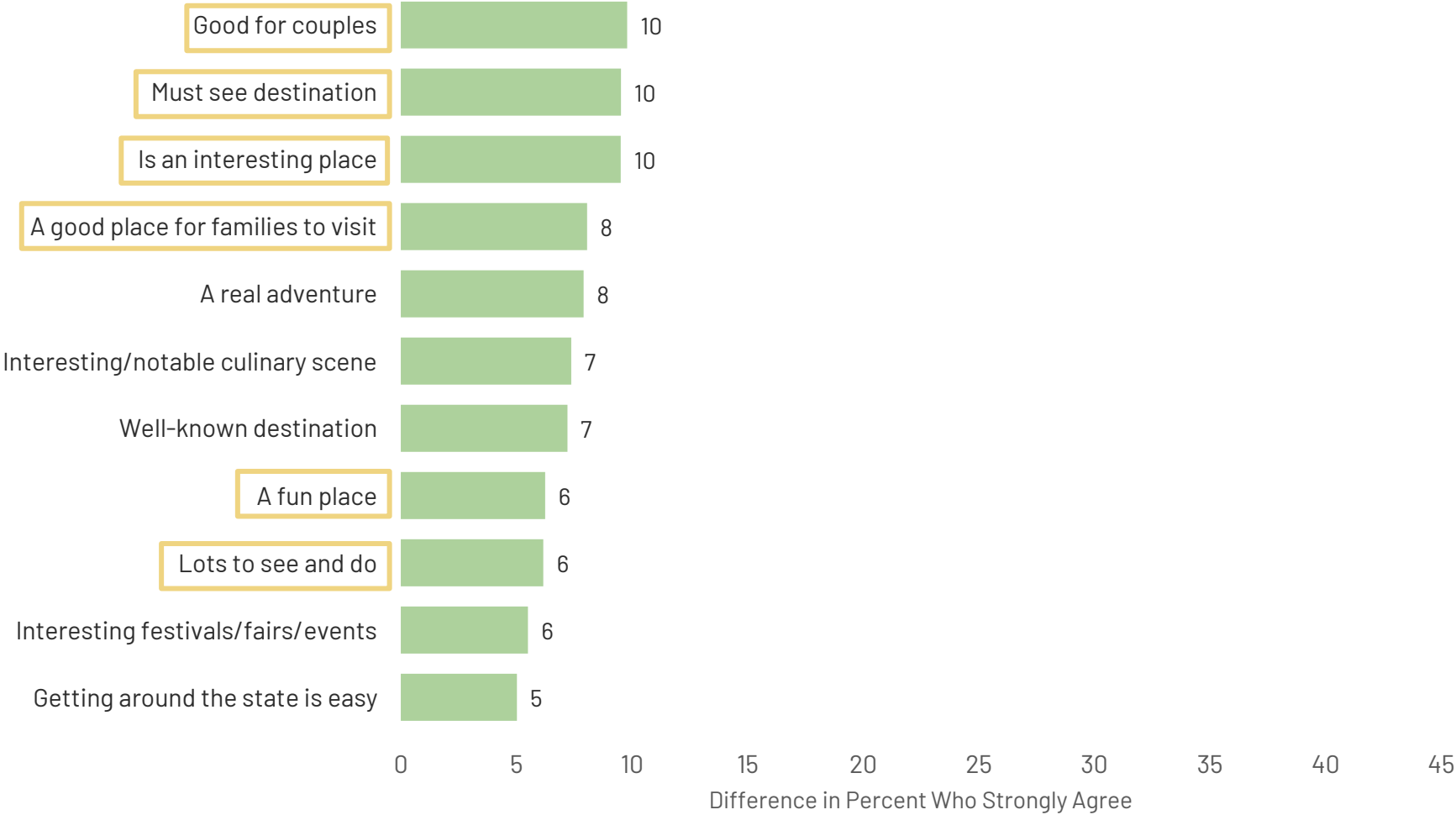
DESTINATION IMAGE STRENGTHS VS. OHIO



Hot Button

Base: Existing Markets

DESTINATION IMAGE STRENGTHS VS. OHIO



Hot Button

Base: Existing Markets

DESTINATION IMAGE WEAKNESSES VS. OHIO

Great for a cold weather vacation

-10

-45 -40 -35 -30 -25 -20 -15 -10 -5 0

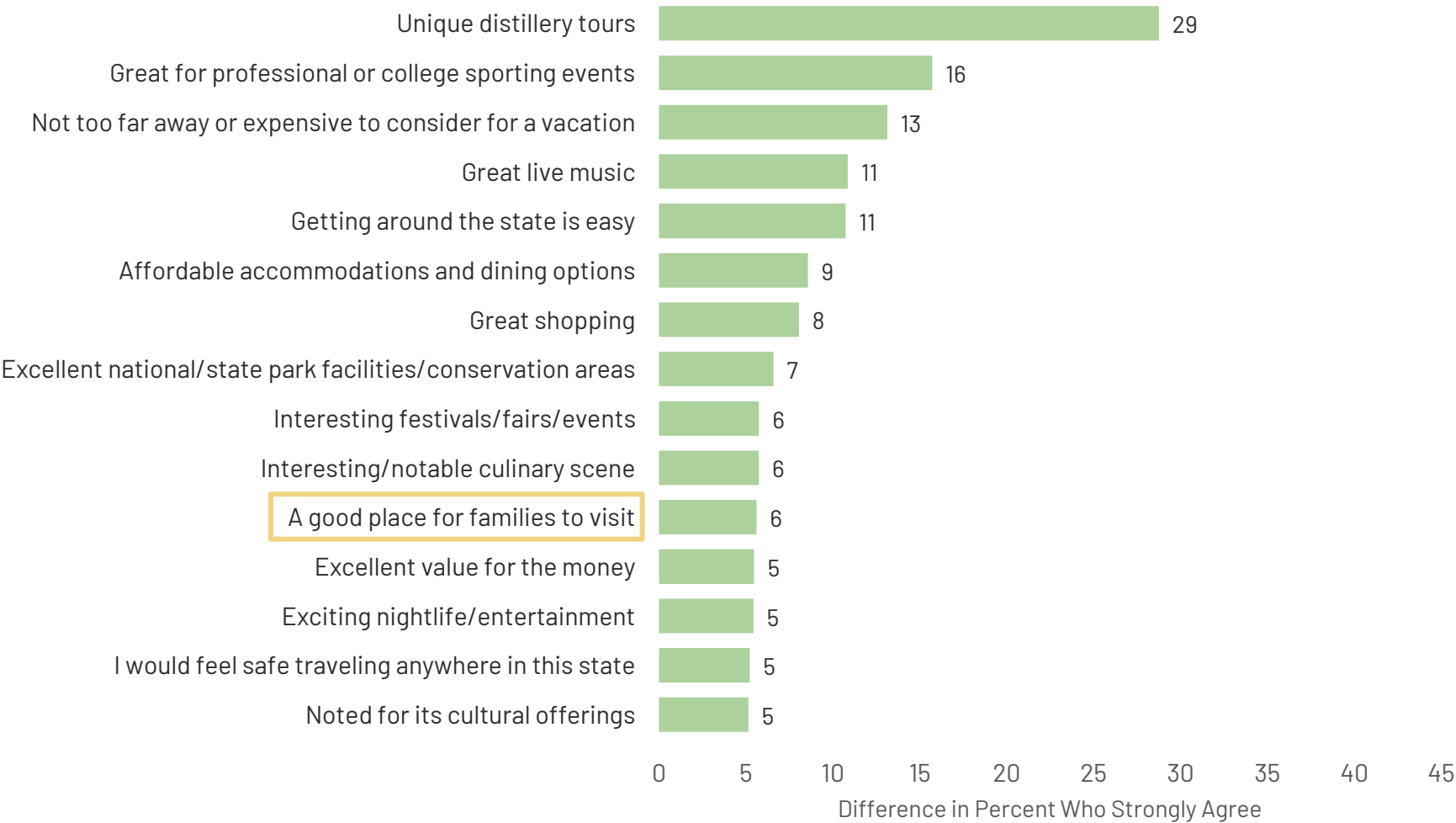
Difference in Percent Who Strongly Agree



KENTUCKY VS. WEST VIRGINIA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. WEST VIRGINIA

"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **West Virginia**.



Hot Button

Base: Existing Markets

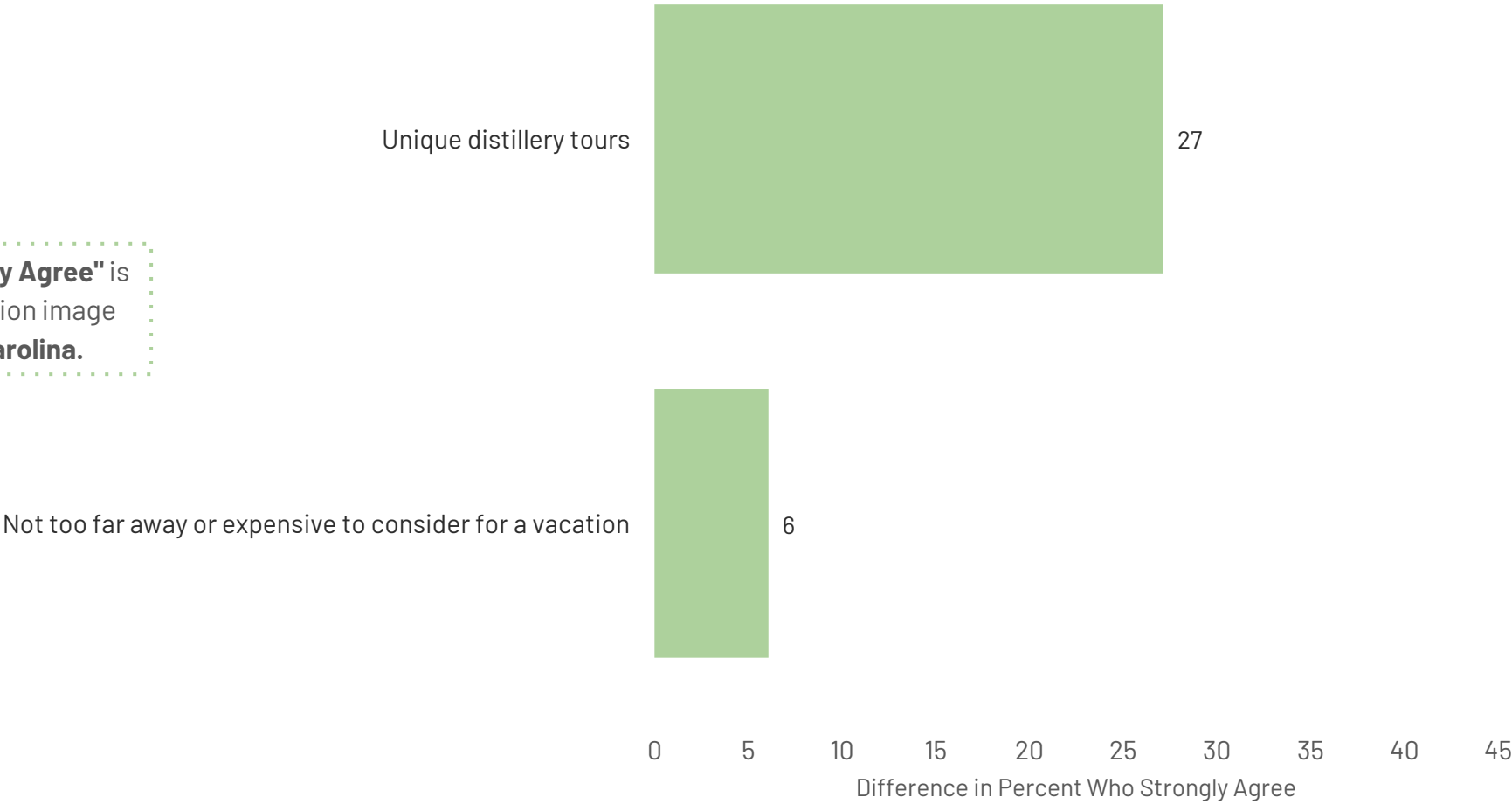
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES VS.
WEST VIRGINIA**



KENTUCKY VS. NORTH CAROLINA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. NORTH CAROLINA

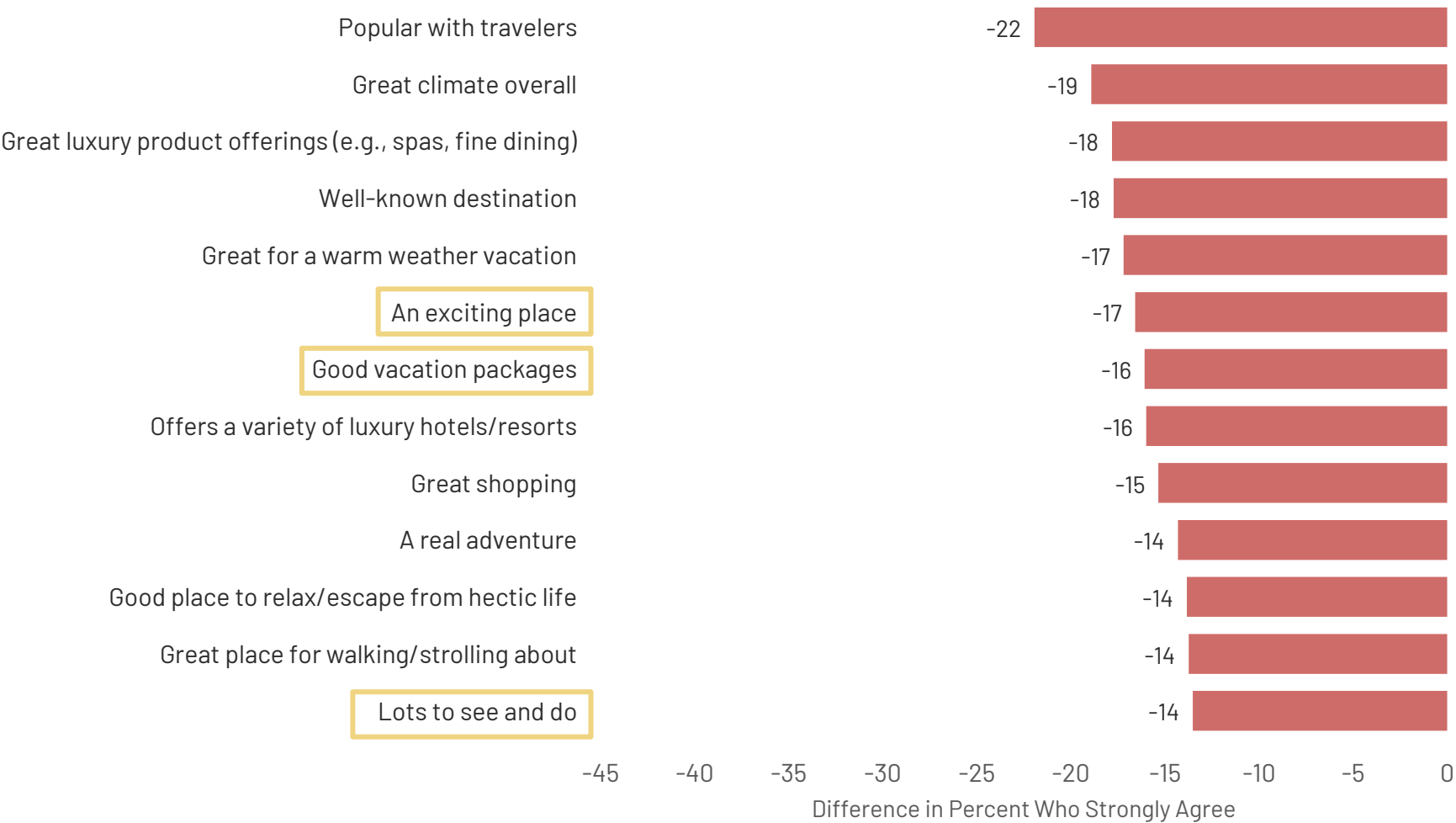
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **North Carolina**.



Hot Button

Base: Existing Markets

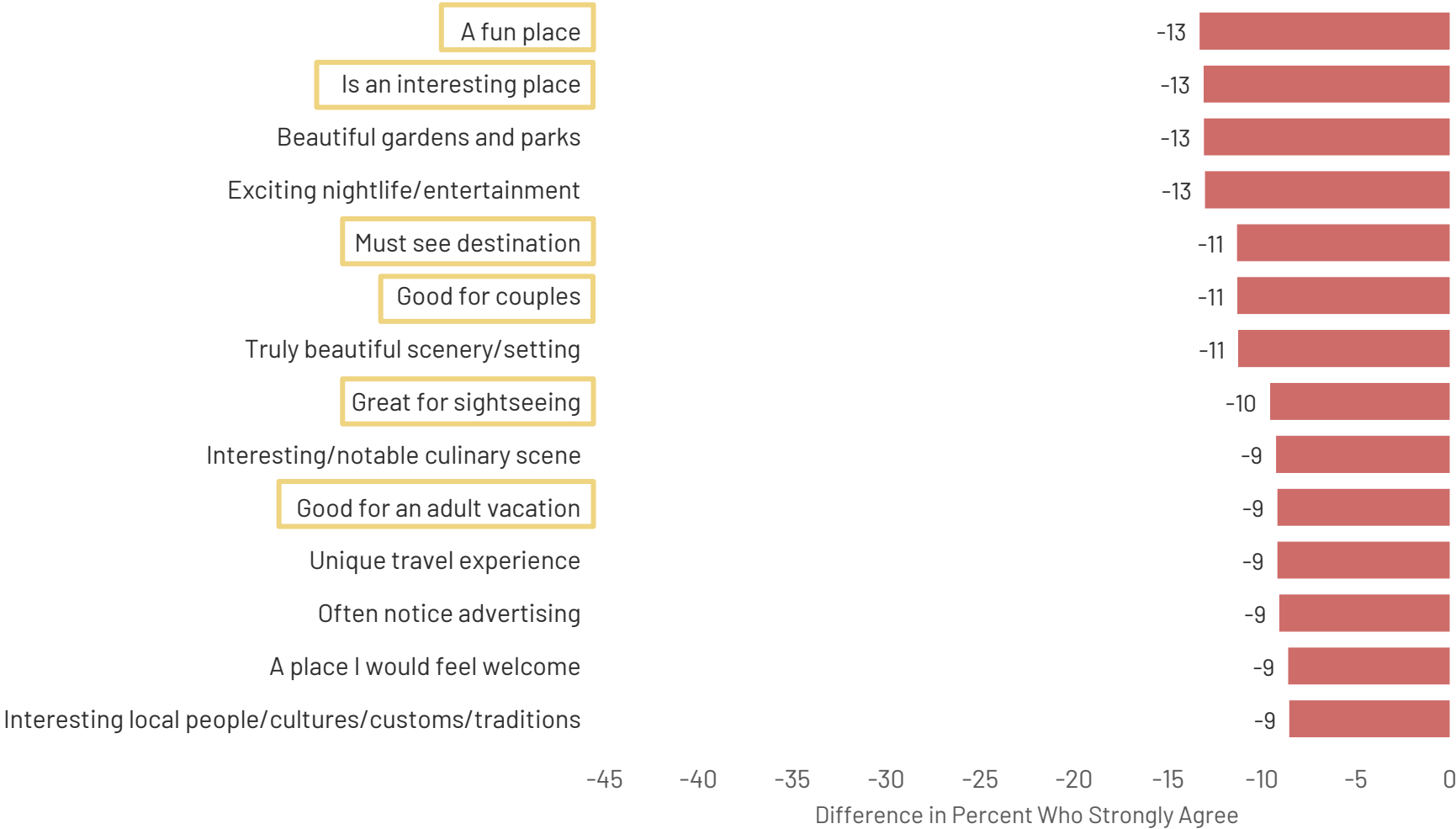
DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Existing Markets

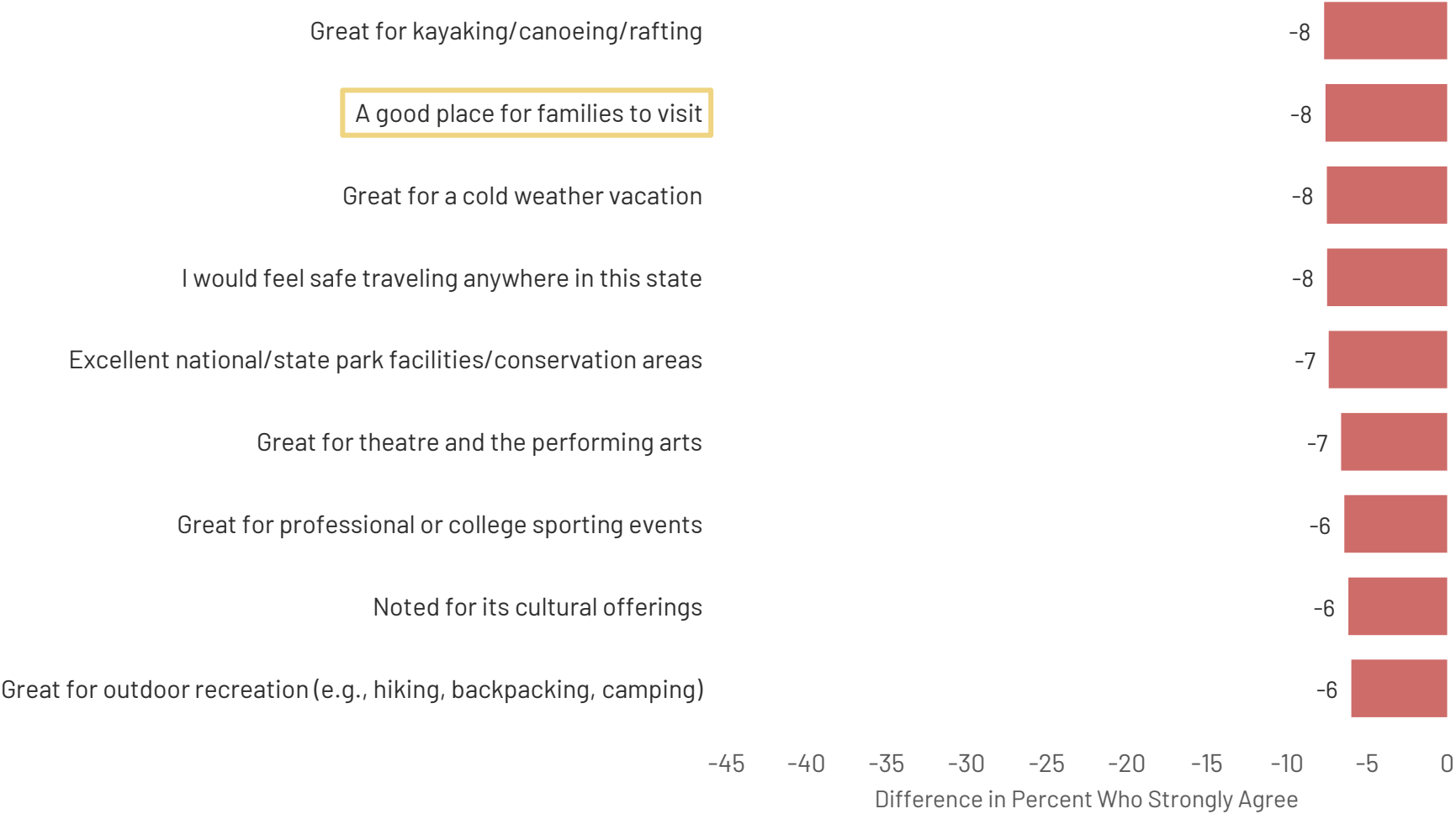
DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Existing Markets

DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Existing Markets

TEAM
KENTUCKY[®]

A light blue silhouette of the state of Kentucky is positioned behind the word "TEAM".

Longwoods
INTERNATIONAL

A small white icon of a globe with a curved arrow pointing upwards, integrated into the letter "o" of the word "Longwoods".