



Kentucky 2024

Total Markets Advertising ROI

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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, New York, Tennessee, and Kentucky, 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 **23 key markets** and received **2000 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 (1,000)

New Markets (1,000)

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)

New Markets

Champaign-Springfield-Decatur (25)
Dallas-Fort Worth (205)
Detroit (125)
Grand Rapids-Kalamazoo-Battle Creek (55)
Orlando-Daytona Beach-Melbourne (115)
Washington, DC (Hagerstown) (185)
Dayton (30)
Cleveland-Akron (Canton) (95)
Toronto [CMA], Ontario (165)

ADVERTISING

Six in ten (62%) travelers in Kentucky Tourism's Total advertising markets recalled seeing at least one Kentucky advertisement during the Spring - Fall 2024 campaign. Existing markets garnered a 66% awareness level and New markets garnered a 58% awareness level. The Fall & Spring AOR ad campaigns had the highest level of awareness, each garnering 57%.

Half (50%) remembered at least one digital ad, followed by video (46%), print (42%), social (37%), audio (35%), and OOH (30%).

The ads with the highest level of recall in the Total advertising markets were:

Spring AOR 30s Video – 38%

Fall AOR 30s Video – 37%

Spring AOR Social Outdoor – 28%

Fall AOR 30s Audio – 28%

Spring AOR 30s Audio – 27%

ADVERTISING

Looking at Kentucky Tourism's Total advertising markets, there were an estimated 723 million ad exposures over the campaign timeframe, with the highest medium being digital ads, at 271 million recalled exposures. Social ads had 101 million recalled exposures, print ads had 136 million recalled exposures, video ads had 93 million, audio ads had 68 million, and OOH ads had 55 million recalled exposures.

When we relate the number of ad exposures recalled to the amount of money spent on advertising in Total advertising markets by medium, we see that the cost for 1,000 recalled exposures for any ad was \$14.92 during the campaign.

Social was the most cost efficient for cost per 1,000 exposures recalled at \$2.37. The ad spend to reach 1,000 recalled exposures was \$5.18 for print, \$8.93 for audio, \$12.34 for digital, \$25.11 for OOH, and \$48.75 for video.

RETURN ON INVESTMENT

The 2024 campaign produced an additional 3.2 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 spent \$529.7 million while in Kentucky.

When related to total advertising costs of \$10.8 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:

\$40.9 million in state and local taxes for Total advertising markets. Return on investment of \$4 in taxes for each ad dollar spent in Total advertising markets.

Kentucky Tourism spent an average of \$3.39 in advertising for every incremental trip earned from Total advertising markets during this campaign.

BRAND HEALTH

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

This campaign had a strong positive impact on Total advertising market travelers' perceptions of Kentucky. Total 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. More recent Kentucky visitors than non-visitors rated the destination favorably in all 10 Hot Button attributes. From this analysis we find that Kentucky had no significant product weaknesses.

Relative to the other destinations in the competitive set for this study, Kentucky places in the middle for its overall image among Total advertising market travelers. Across the Total advertising markets surveyed, about half (47%) rated Kentucky very favorably as a destination they "would really enjoy visiting." Kentucky ranks in third place behind North Carolina (62%) & Tennessee (61%), Georgia (57%), and ahead of West Virginia (43%), Indiana (37%), and Ohio (35%).

Amongst the competitive destinations included in this study, Kentucky ranks more favorably as a destination that has "excellent value for the money."

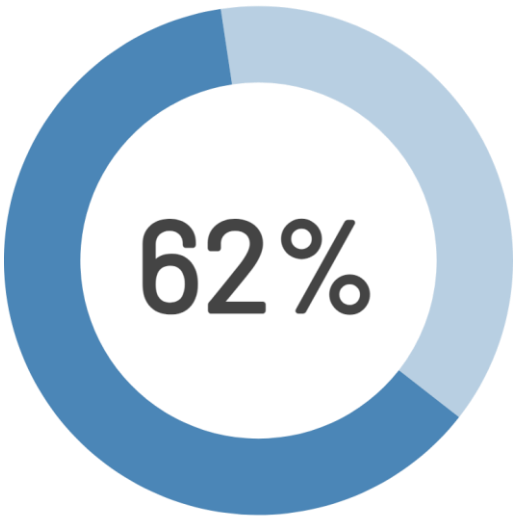


[ADVERTISING AWARENESS]

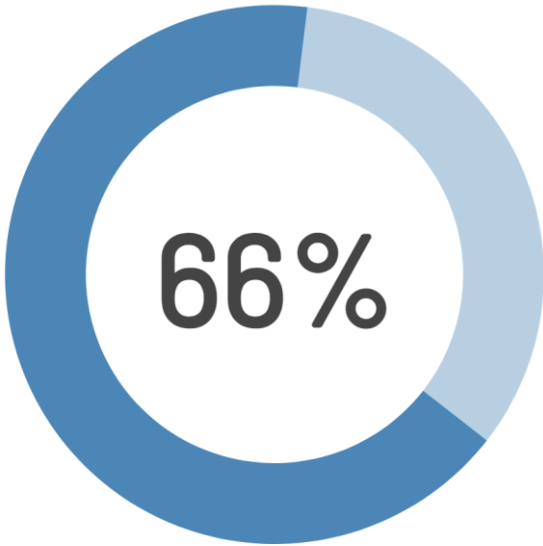


ADVERTISING AWARENESS* BY MARKET

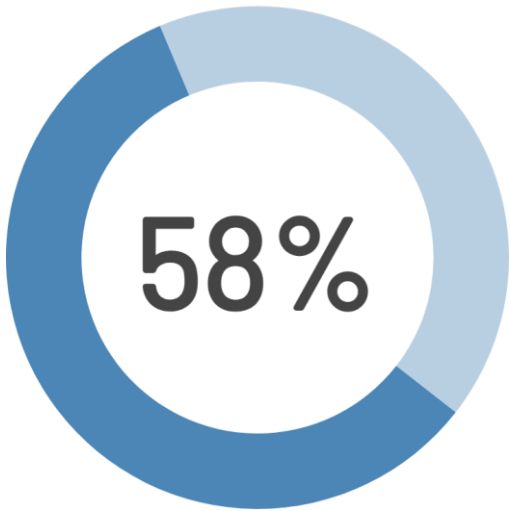
TOTAL MARKETS



EXISTING MARKETS

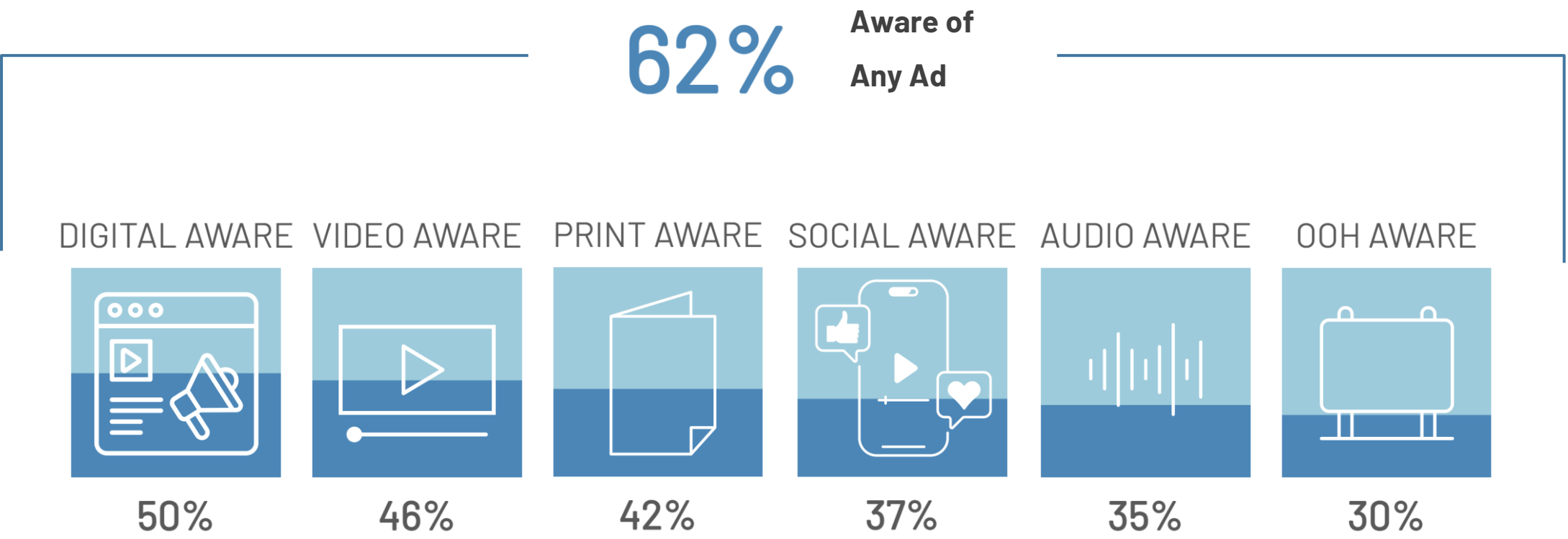


NEW MARKETS



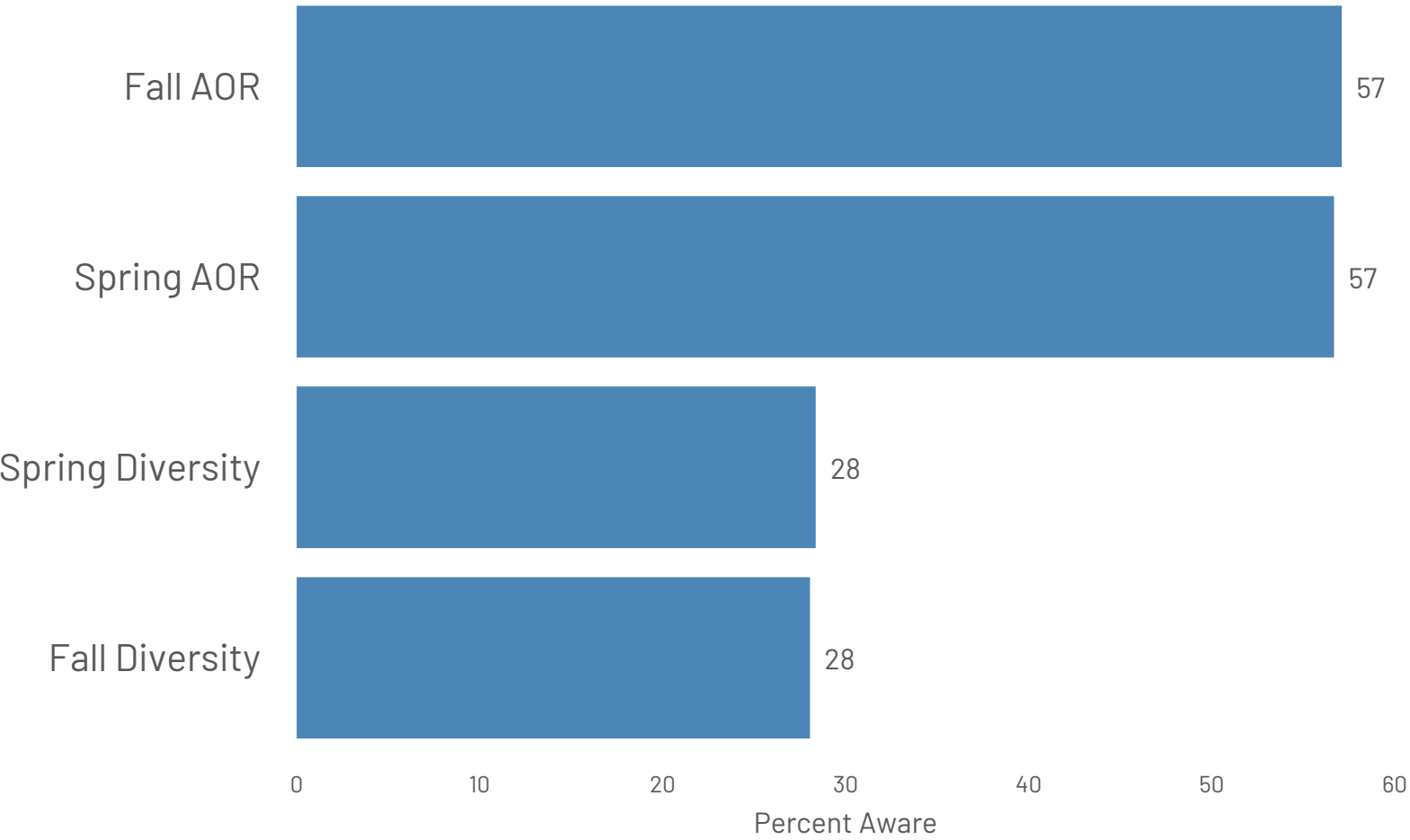
*Saw at least one ad and based on markets where shown
Base: Total Markets

AWARENESS* OF THE AD CAMPAIGN



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

ADVERTISING AWARENESS* BY CAMPAIGN



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



Ad by Travel Kentucky 

World-renowned bourbon

Discover Kentucky's unique bourbon experiences and fascinating distillery tours.



Ad by Travel Kentucky 

Be one with nature

Houseboats, rock climbing and epic vistas — experience Kentucky's great outdoors.



Ad by Travel Kentucky 

Legendary horse culture

Make new four-legged friends and visit iconic race tracks and museums throughout Kentucky.

Spring AOR - Native Compilation

DIGITAL ADVERTISING CREATIVE (Cont'd)



Spring AOR - Display Leisure Omnibus Compilation



Spring AOR - Display Leisure Outdoors Compilation



Ad by Travel Kentucky 

World-renowned bourbon

Discover Kentucky's unique bourbon experiences and fascinating distillery tours.



Ad by Travel Kentucky 

Legendary horse culture

Make new four-legged friends and visit iconic race tracks and museums throughout Kentucky.



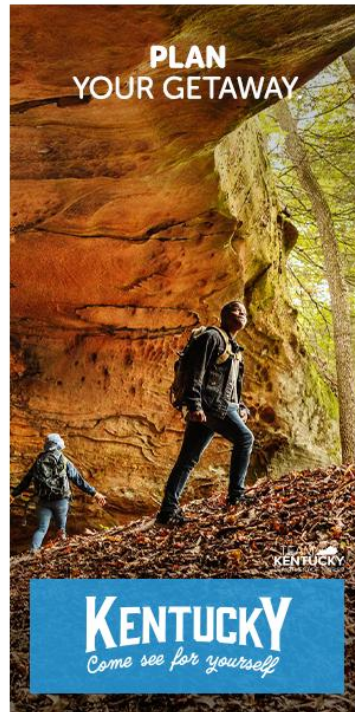
Ad by Travel Kentucky 

Glide Through Nature

Enjoy the spectacular scenery of horse and bourbon country on a family tour.

Fall AOR - Native Compilation

DIGITAL ADVERTISING CREATIVE (Cont'd)



Fall AOR - Display Compilation



Fall AOR - Rich Media Page Grabber

DIGITAL ADVERTISING CREATIVE (Cont'd)



Ad by Travel Kentucky

Enrich your life

Discover Kentucky's unique culture through museums, musical performances and local eats.



Spring Black Traveler - Digital Compilation



Ad by Travel Kentucky

Create cherished memories

Share spectacular adventures and family fun throughout the Bluegrass State.

Spring LatinX Traveler - Digital Compilation



Ad by Travel Kentucky 

Make new friends

Throughout Kentucky, people and horses share a special connection. Feel it for yourself.

Spring LGBTQ+ Traveler - Digital Compilation



Ad by Travel Kentucky 

Nature at your doorstep

A getaway to Kentucky offers all kinds of opportunities to escape the everyday world.

**BE ONE
WITH NATURE.**

**TEAM
KENTUCKY**
DEPARTMENT OF TOURISM

Fall Black Traveler - Digital Compilation

DIGITAL ADVERTISING CREATIVE (Cont'd)



Ad by Travel Kentucky

Escape the every day

Kentucky's outdoors are perfect for the ultimate family glamping adventure.



Ad by Travel Kentucky

Create enduring moments

Pair signature Bluegrass flavors and sips with can't-miss performing arts and live music.

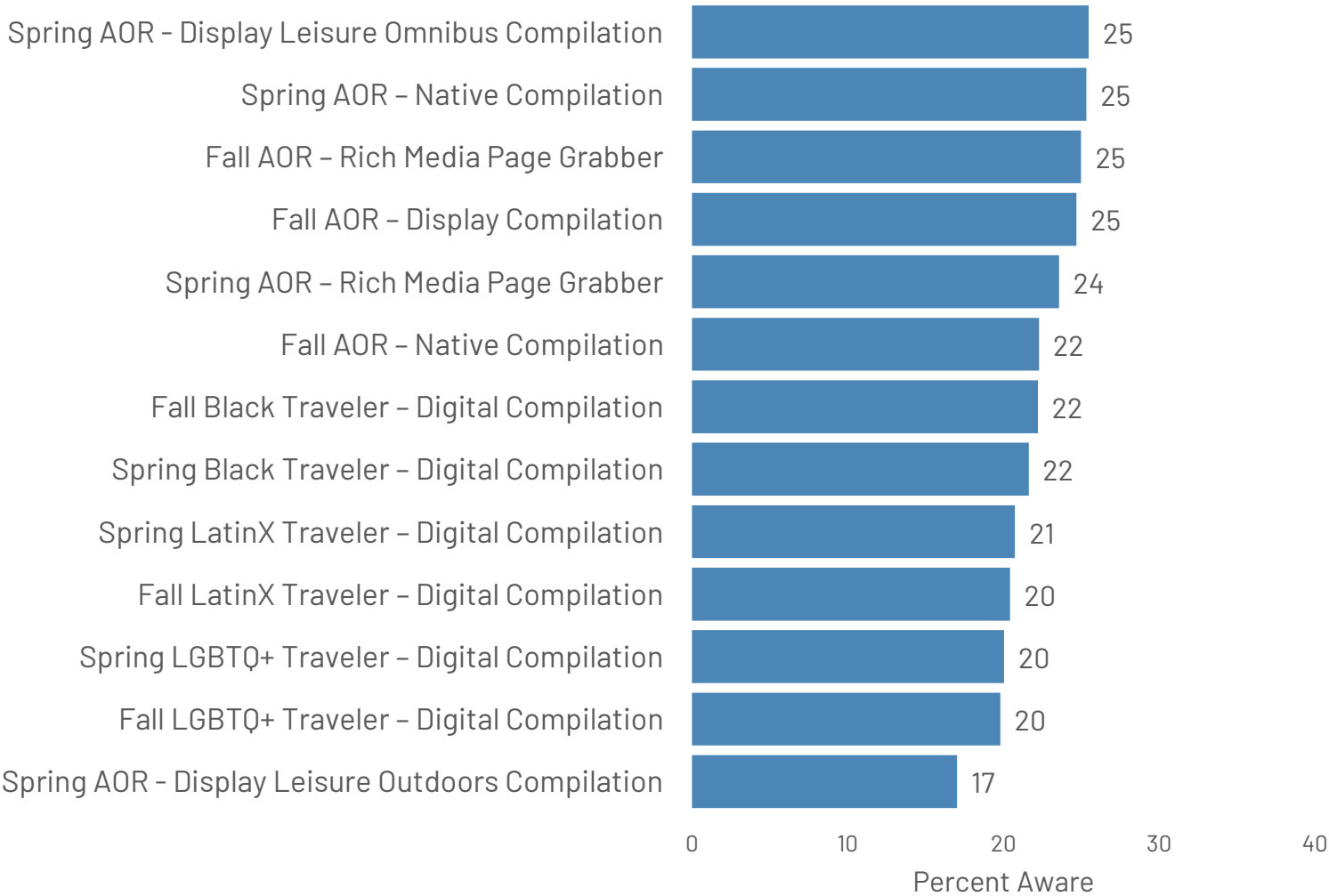
Fall LatinX Traveler - Digital Compilation

Fall LGBTQ+ Traveler - Digital Compilation

AWARENESS* OF DIGITAL ADS

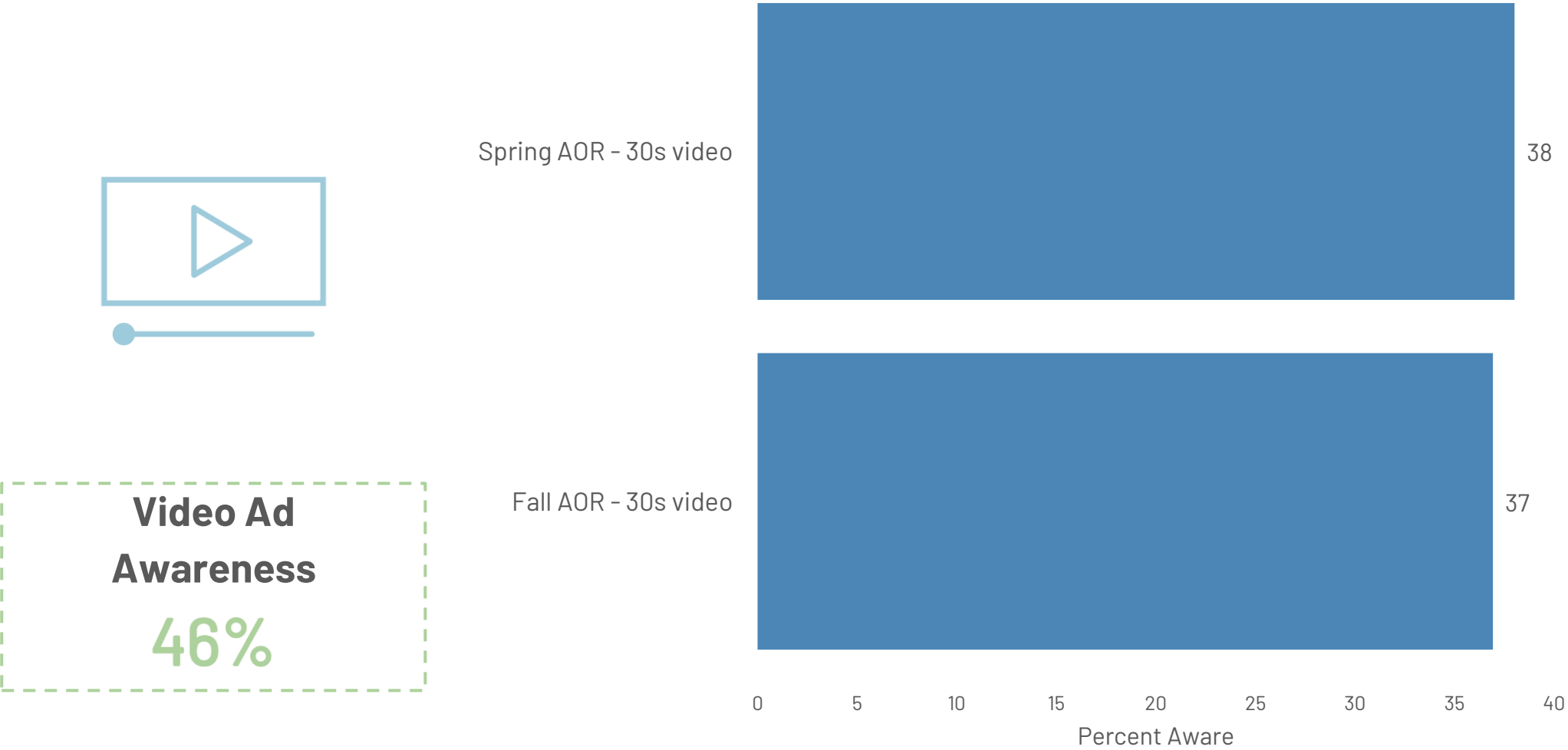


**Digital Ad
Awareness**
50%



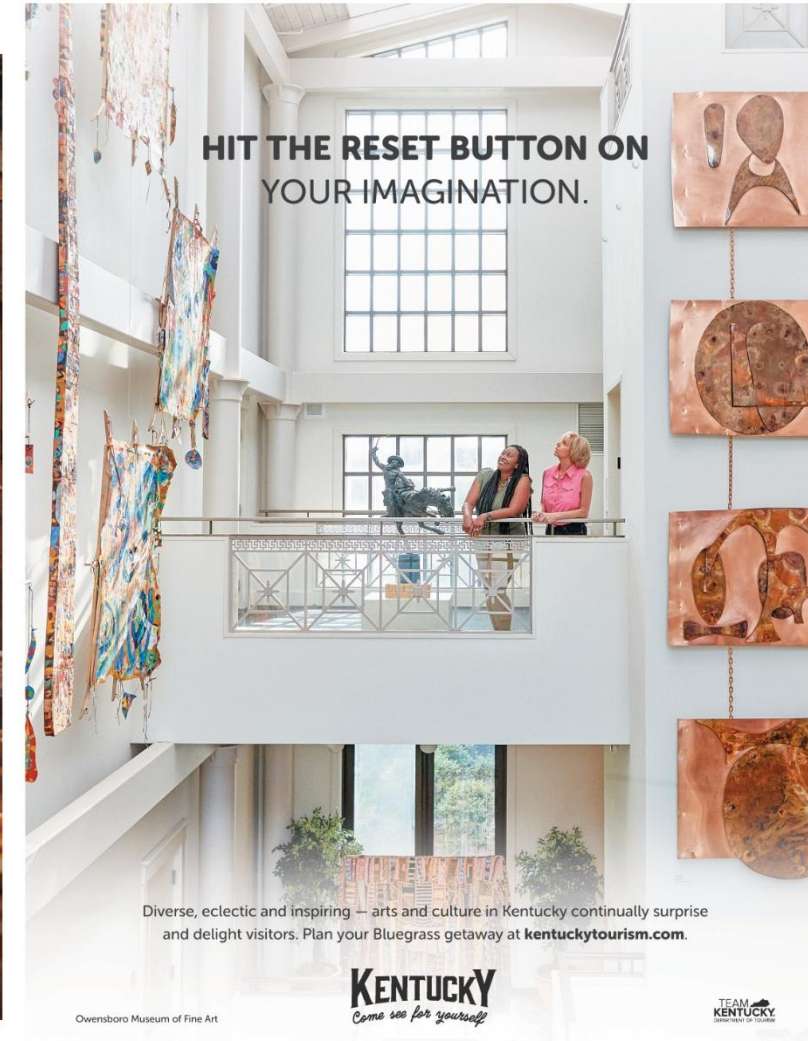
*Saw at least one ad and based on markets where shown
Base: Total Markets

AWARENESS* OF VIDEO ADS



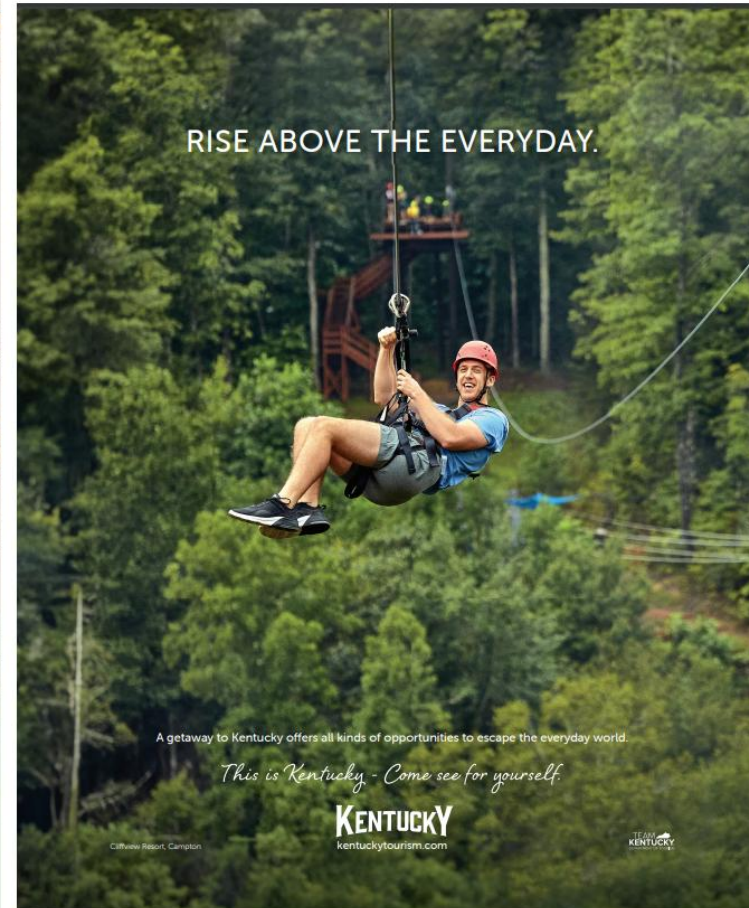
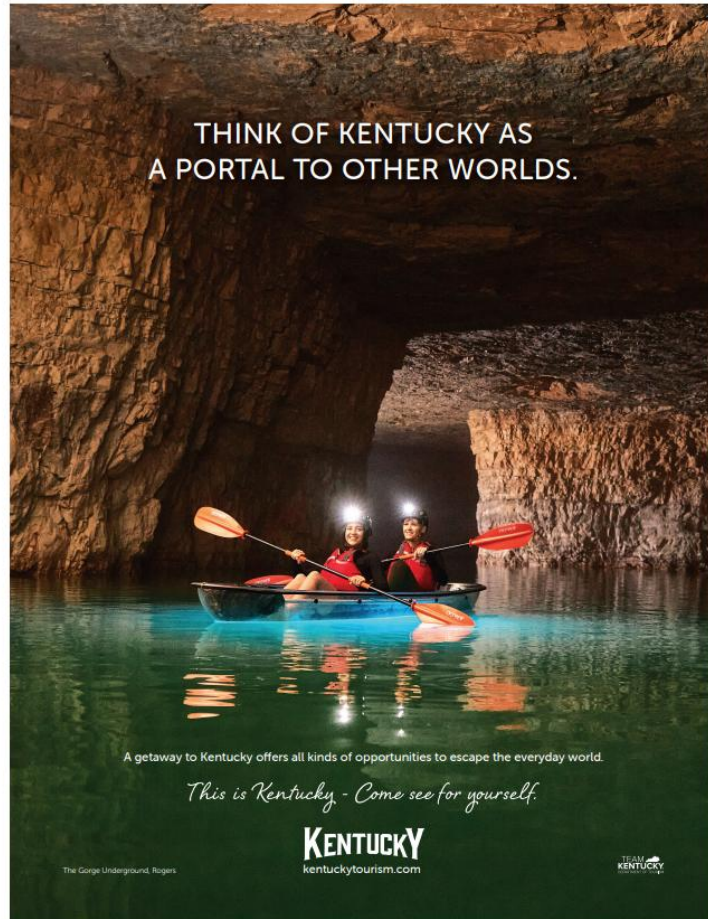
*Saw at least one ad and based on markets where shown
Base: Total Markets

PRINT ADVERTISING CREATIVE



Spring AOR – Print National Compilation 1

PRINT ADVERTISING CREATIVE (Cont'd)

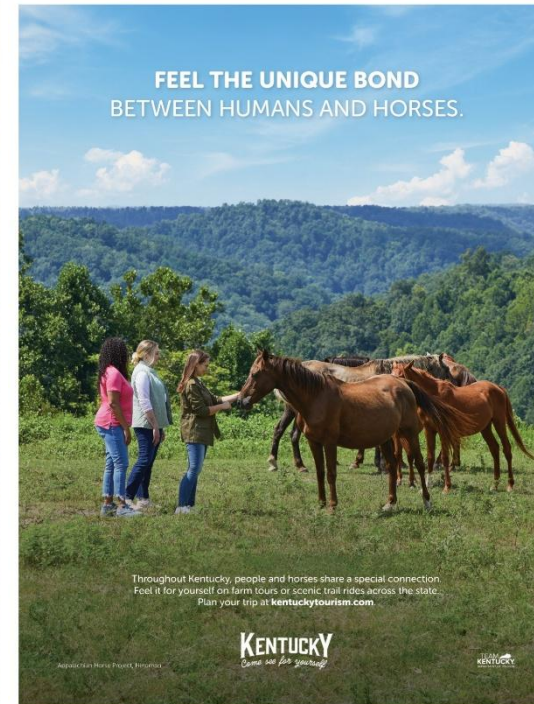
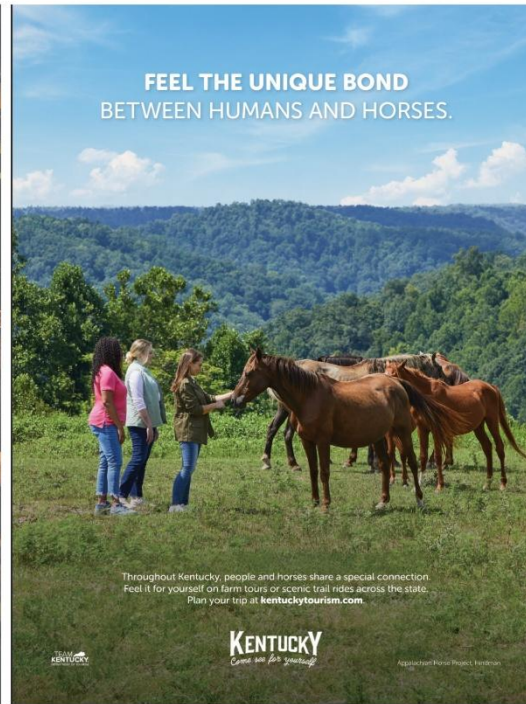


Spring AOR – Print National Compilation 2

PRINT ADVERTISING CREATIVE (Cont'd)



Spring AOR - Print Toronto Compilation

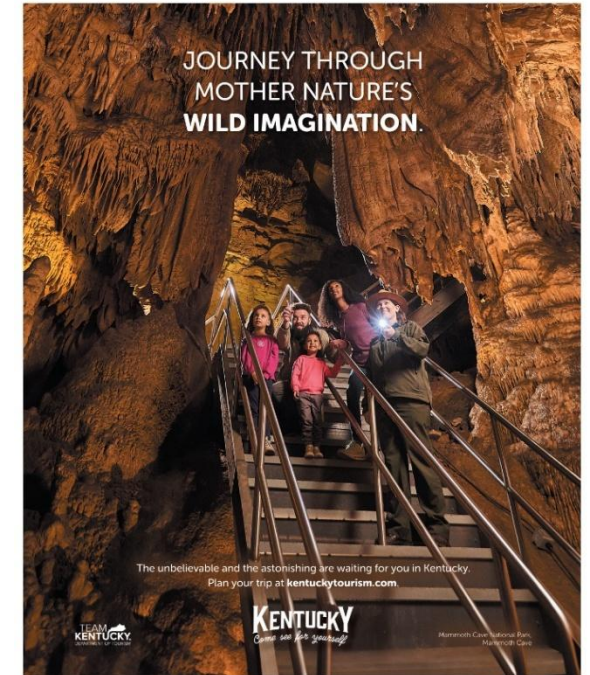
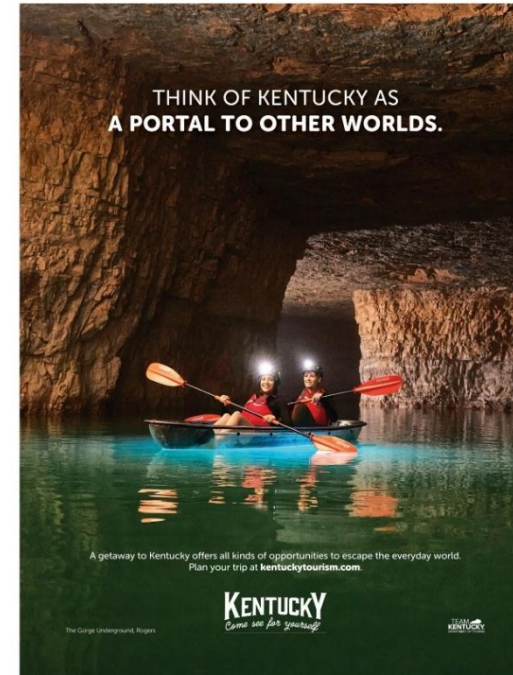
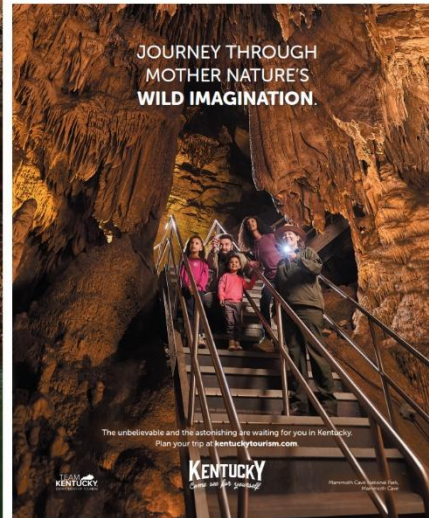
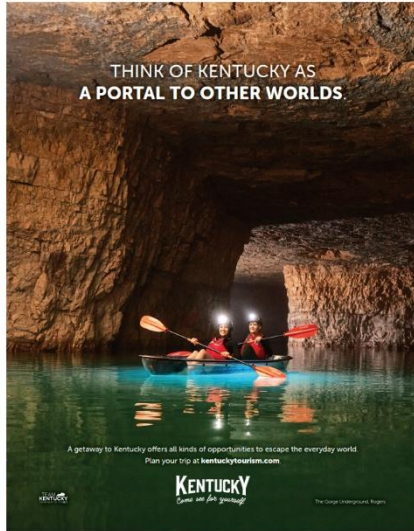
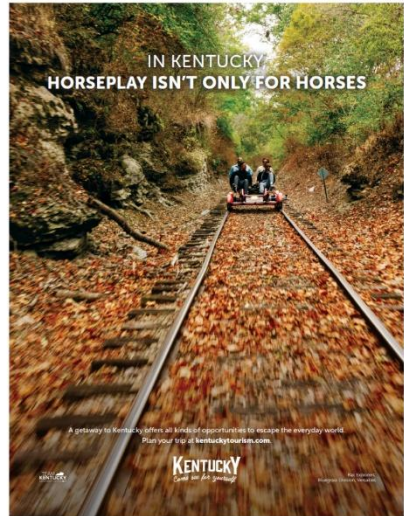


Spring AOR - Print Horse
Farm Tour



Spring AOR - Print Tubing

PRINT ADVERTISING CREATIVE (Cont'd)

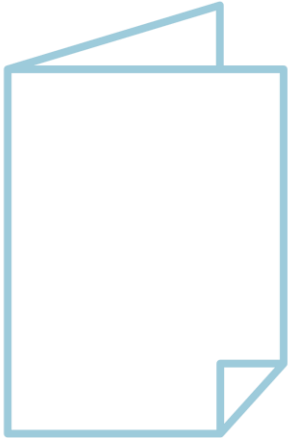


Fall AOR - Print Toronto Compilation

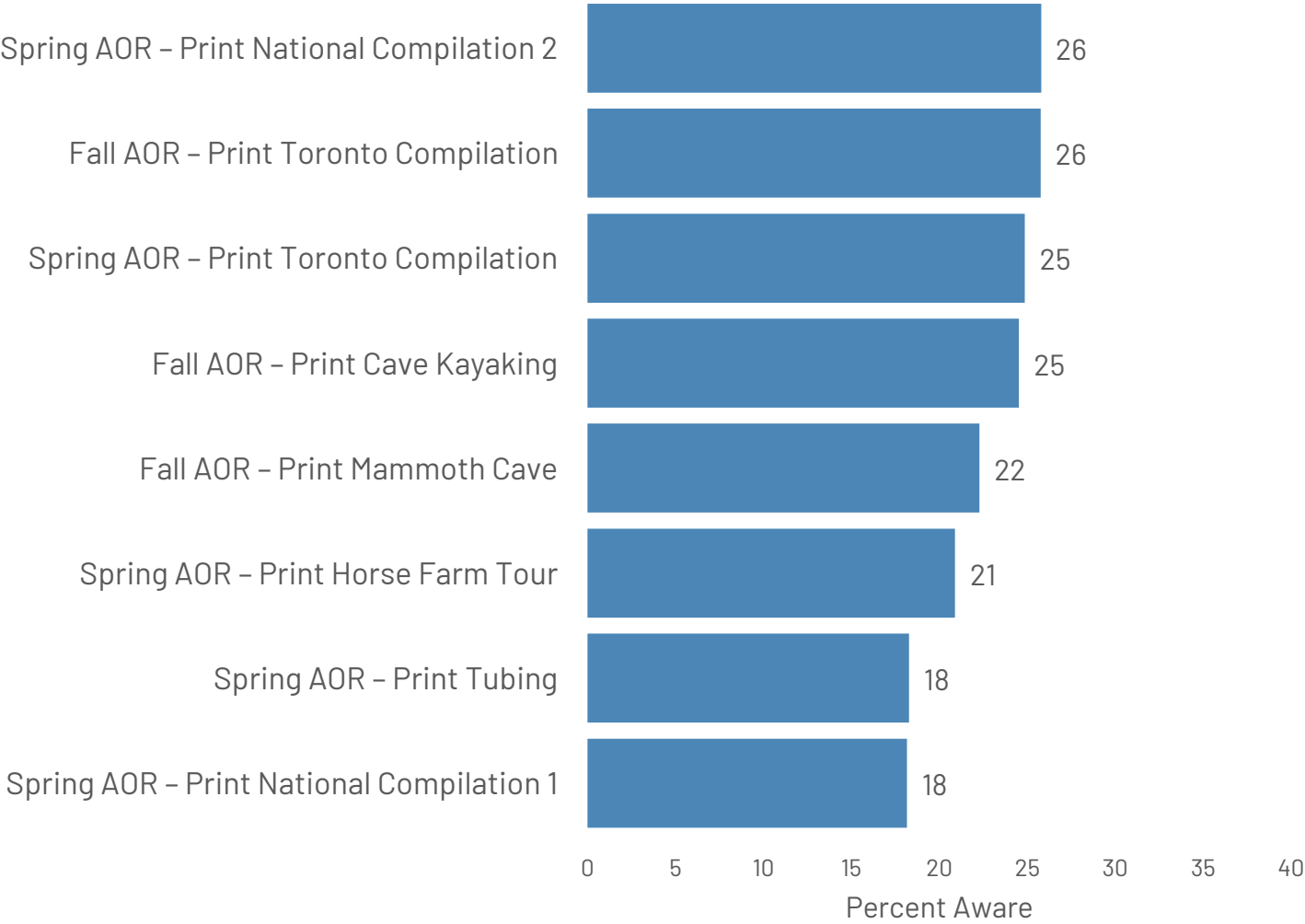
Fall AOR - Print Cave Kayaking

Fall AOR - Print
Mammoth Cave

AWARENESS* OF PRINT ADS




**Print Ad
Awareness**
42%



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

SOCIAL ADVERTISING CREATIVE





Kentucky Tourism

Sponsored · 🌐

✕ ⋮

Thrill seekers and nature lovers, it's time to embark on an epic outdoor adventure in Kentucky. From above ground to below, the perfect getaway is waiting for you!



Seek thrill rides.

Learn more

Sleep under the trees.

👍❤️👏 2.8K

246 comments

274 shares

👍 Like

💬 Comment

➦ Share

Spring AOR - Social Outdoor



Kentucky Tourism

Sponsored · 🌐

✕ ⋮

Discover Kentucky's unique bourbon experiences and fascinating distillery tours.



Tour the distilleries

Learn more

Learn about the craft.

👍❤️👏 209

2 comments

6 shares

👍 Like

💬 Comment

➦ Share

Spring AOR - Social Bourbon




Kentucky Tourism

Sponsored · 🌐

✕ ⋮

Diverse, eclectic and inspiring – delight in Kentucky's music, arts and culture.



Leave ordinary...

Learn more

Hear their stories

👍❤️👏 257

19 comments


4 shares

👍 Like

💬 Comment

➦ Share

Spring AOR - Social Culture





Kentucky Tourism

Sponsored · 🌐

✕ ⋮

Enjoy an equestrian adventure like no other in Kentucky. Gallop into fun with new four-legged friends or watch these majestic athletes in action.



Legendary horse culture

Learn more

Explore on horseback

👍❤️👏 681

48 comments


57 shares

👍 Like

💬 Comment

➦ Share

Spring AOR - Social Horses





Kentucky Tourism

Sponsored · 🌐

✕ ⋮

Thrill seekers and nature lovers, it's time to embark on an epic outdoor adventure in Kentucky. From above ground to below, the perfect getaway is waiting for you!



Seek thrill rides.

Learn more

Sleep under the trees.

👍❤️👏

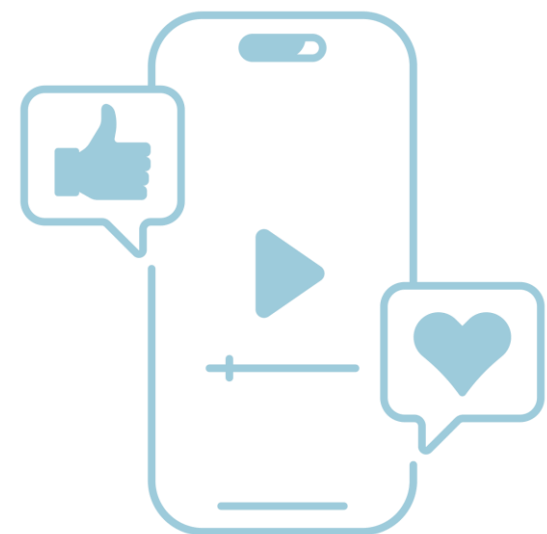
👍 Like

💬 Comment

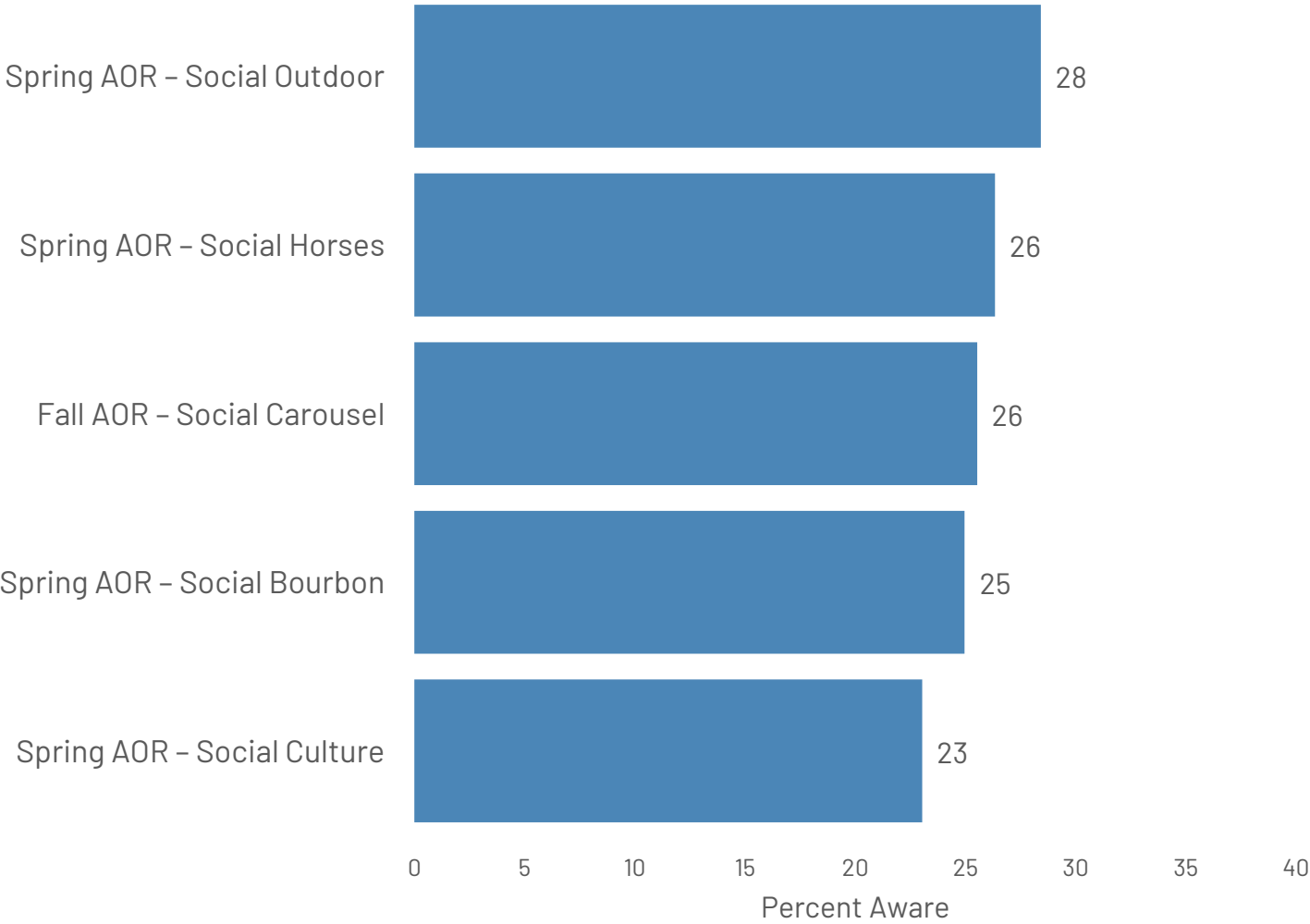
➦ Share

Fall AOR - Social Carousel

AWARENESS* OF SOCIAL ADS

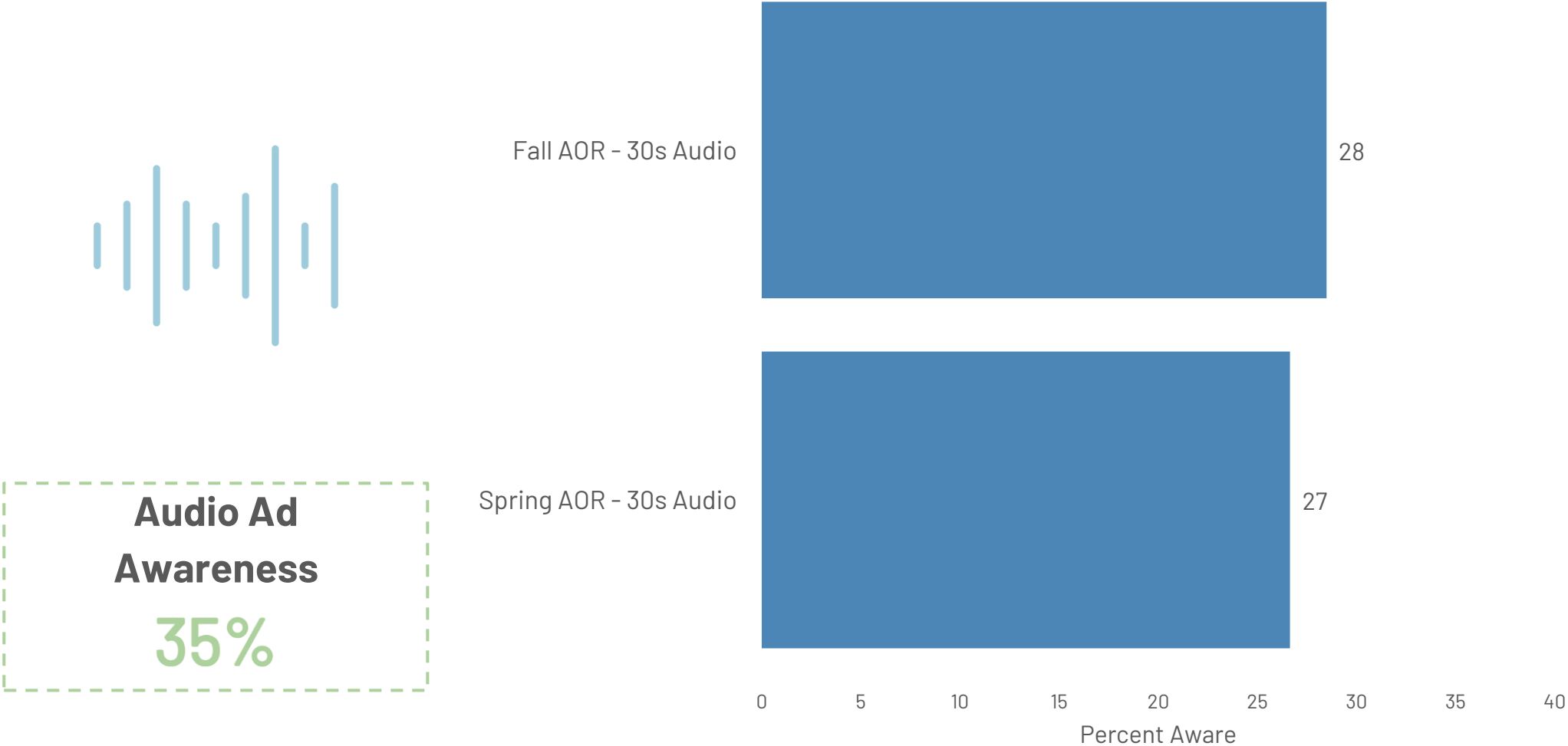


Social Ad Awareness
37%



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

AWARENESS* OF AUDIO ADS



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



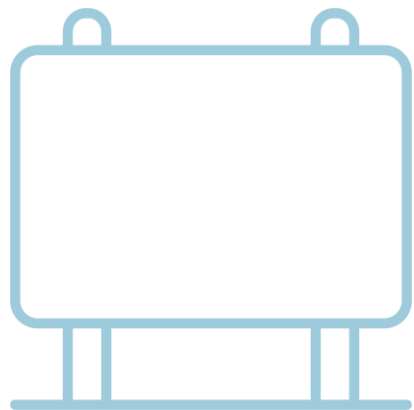
Spring AOR - OOH Compilation

OOH ADVERTISING CREATIVE (Cont'd)



Fall AOR - OOH Compilation

AWARENESS* OF 00H ADS



**OOH Ad
Awareness**
30%

Spring AOR - OOH Compilation



22

Fall AOR - OOH Compilation

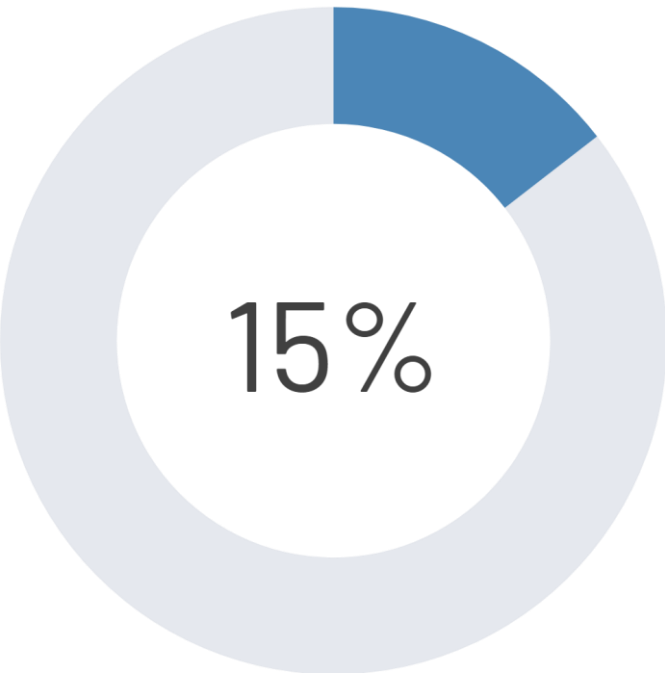


22

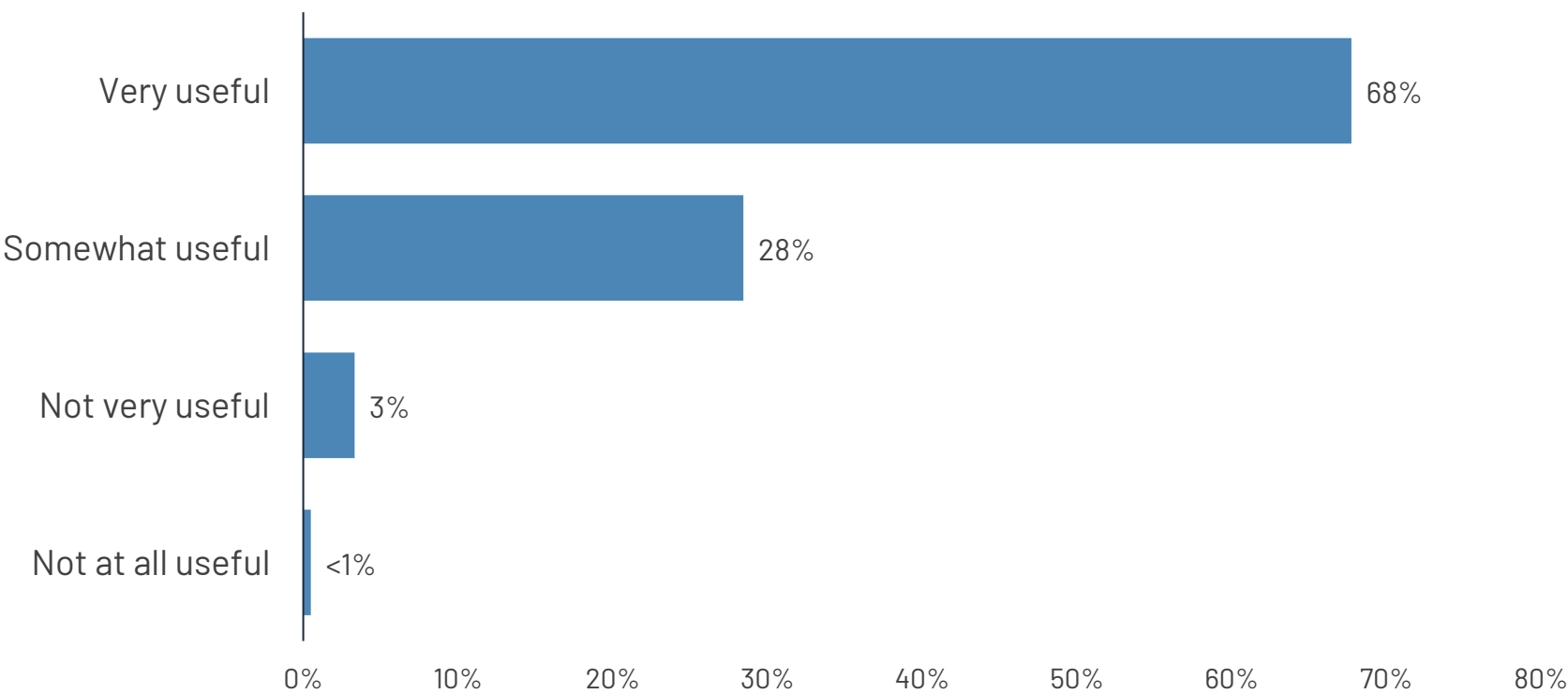
0 5 10 15 20 25 30 35 40
Percent Aware

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

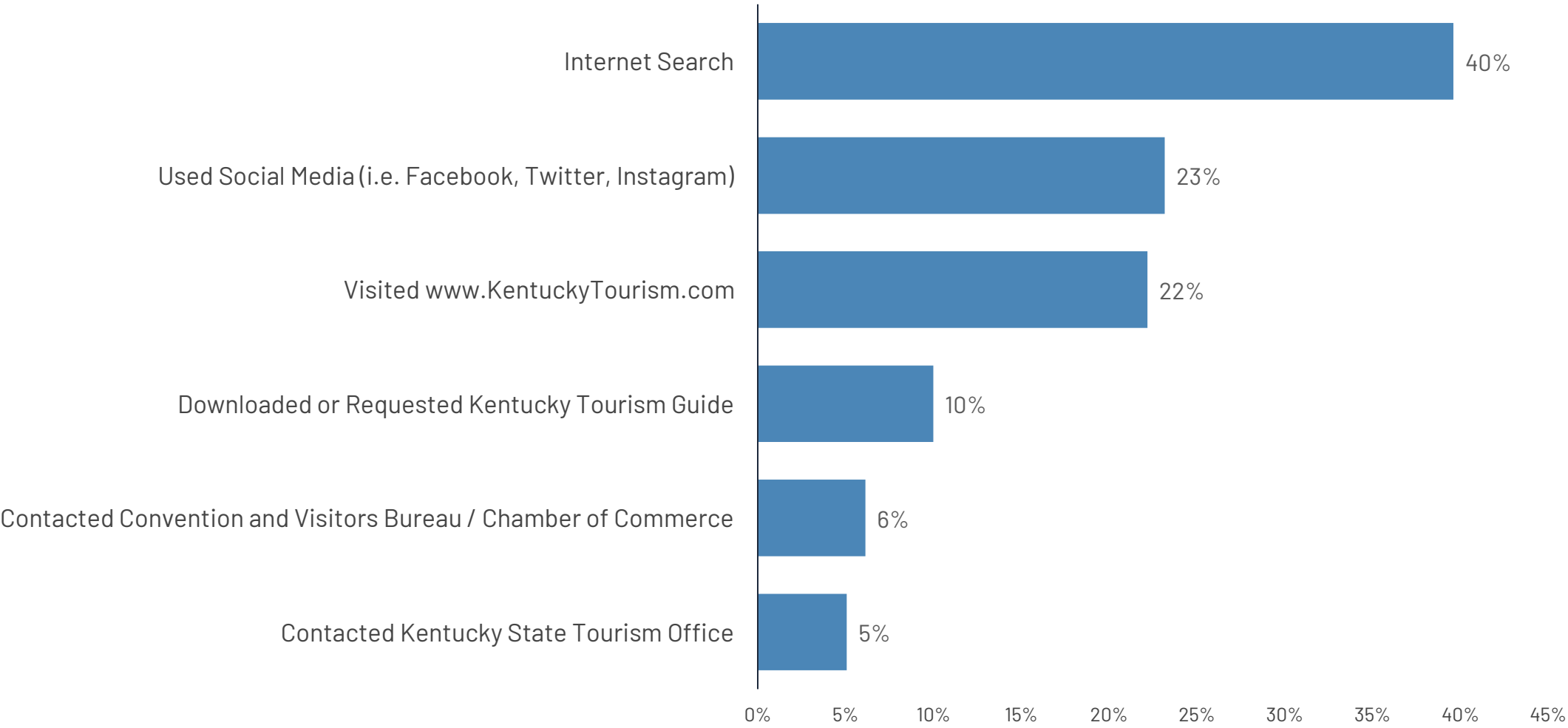
Awareness of Website



How useful was the Tourism Kentucky website?



ACTIONS TAKEN TO OBTAIN INFORMATION ABOUT TRAVELING TO KENTUCKY



Base: Total Markets



[MEDIA DIAGNOSTICS]



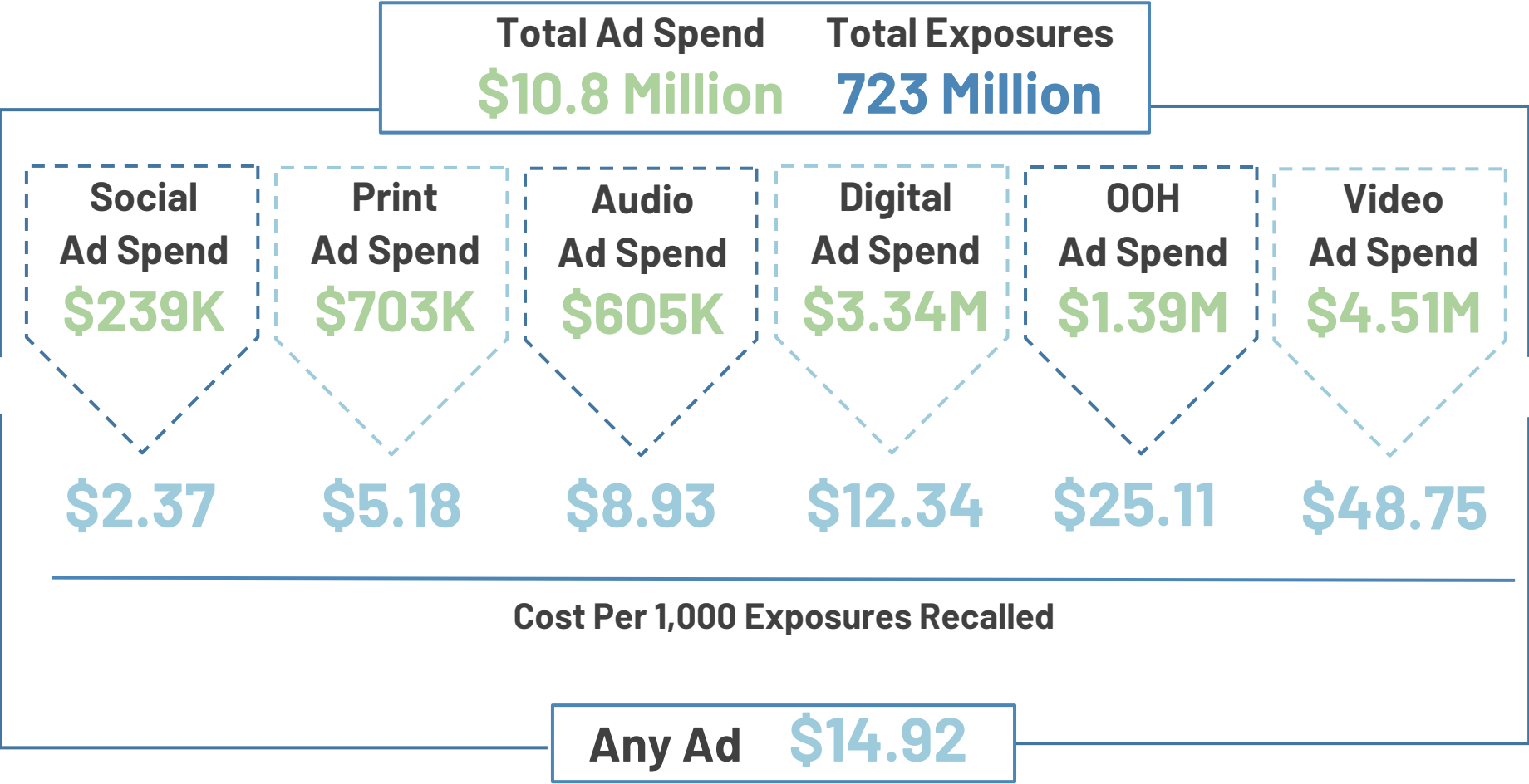
TOTAL EXPOSURES* RECALLED BY MEDIUM



Looking at **Kentucky's Total advertising markets**, there were an estimated 723 million total ad exposures over the campaign timeframe, with the highest medium being digital ads, at 271 million recalled exposures. Social ads had 101 million recalled exposures, print ads had 136 million recalled exposures, video ads had 93 million, audio ads had 68 million, and OOH ads had 55 million recalled exposures.

*Incidence of awareness x traveler population x mean frequency recalled
Base: Total Markets

COST PER THOUSAND EXPOSURES RECALLED



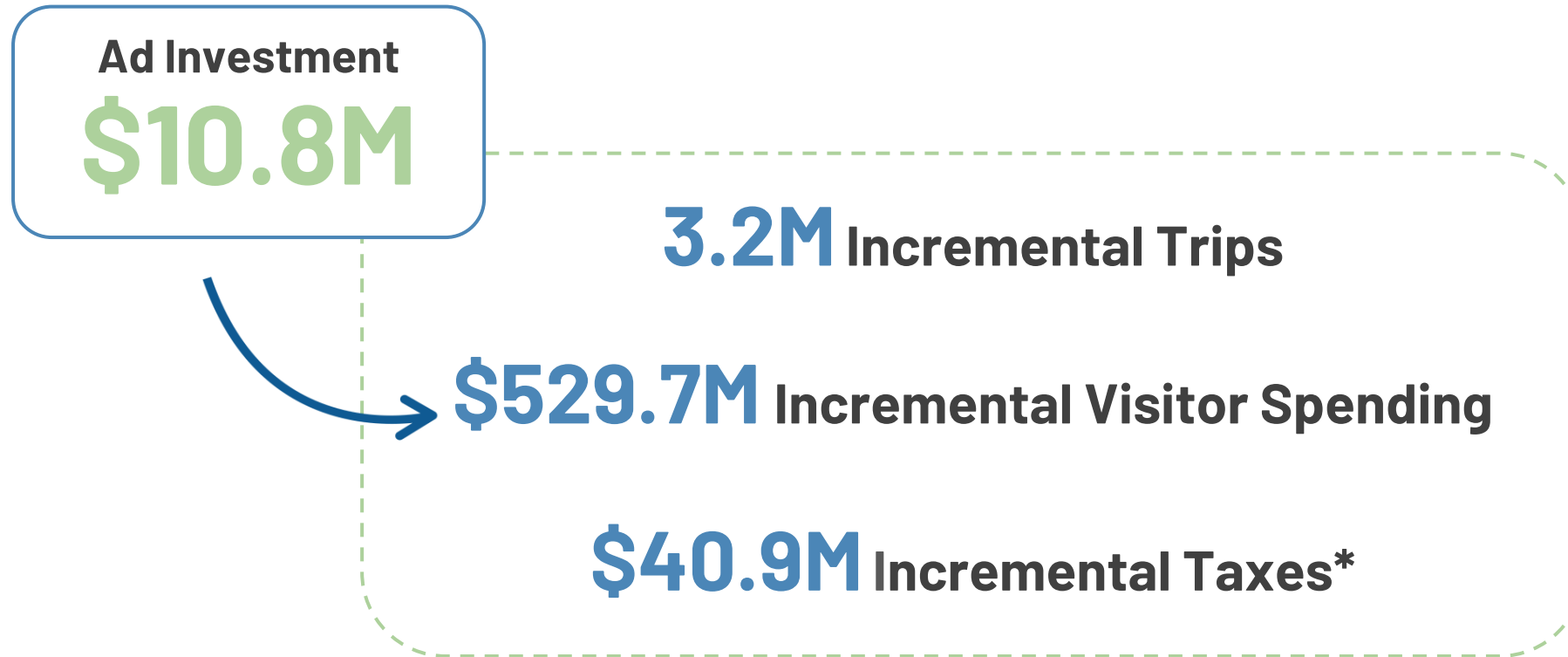
The cost per 1,000 exposures recalled for any ad in Kentucky’s Spring – Fall 2024 campaign is **\$14.92**.
Social ad spend was the most efficient for cost per 1,000 exposures recalled at \$2.37.



[RETURN ON INVESTMENT]



RETURN ON INVESTMENT: 2024



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 \$3.39 in advertising for every incremental trip earned from Total advertising markets during this campaign.

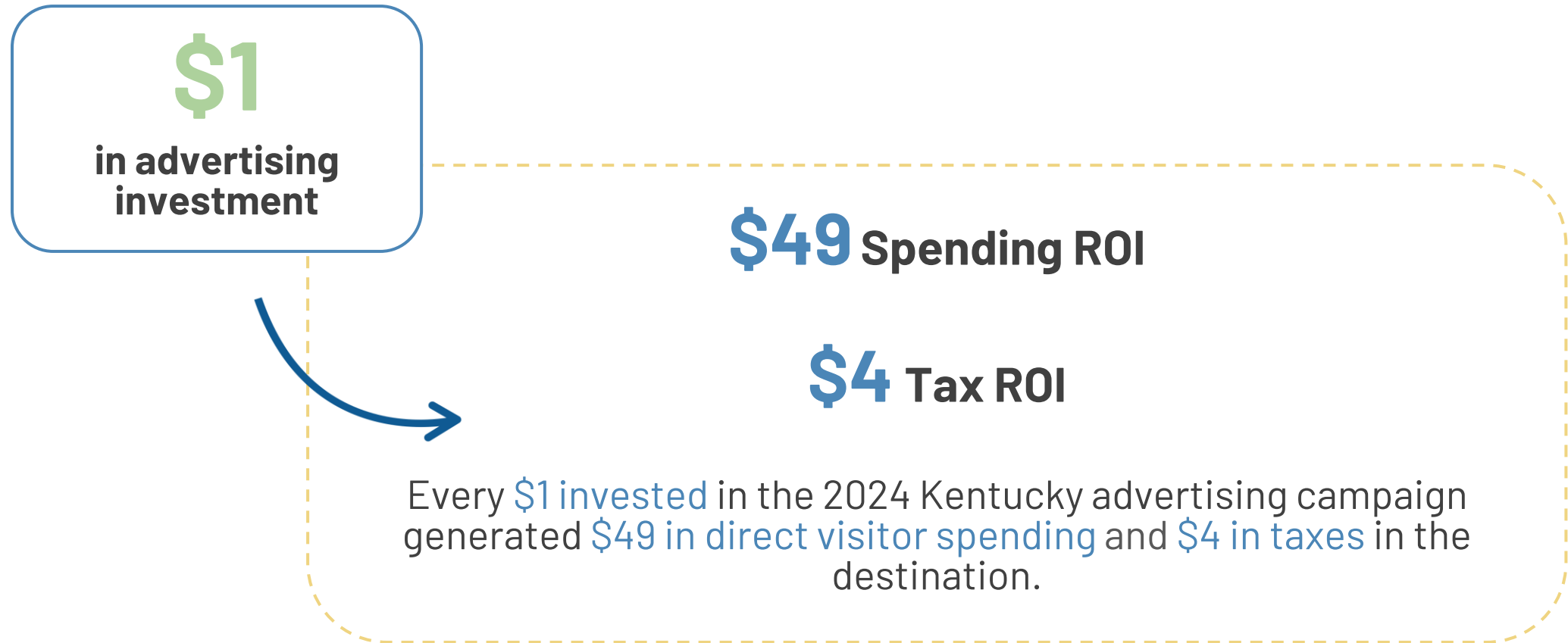
CAMPAIGN EFFICIENCY

Ad \$'s Per Trip: **\$3.39**

Trips Per Ad \$: **0.29**

	Existing Markets	New Markets	Total
Ad \$'s per Trip	\$3.08	\$4.18	\$3.39
Trips per Ad \$	0.33	0.24	0.29

THE BOTTOM LINE



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



DESTINATION VISITATION AND INTEREST



PAST VISITATION



44% of travelers within Kentucky's Total markets have visited the state during their lifetime. Among those, 52% have visited during the past 2 years.

	Ever	Visited Past 2 Year*
Ohio	44%	59%
Indiana	39%	57%
Tennessee	55%	55%
Kentucky	44%	52%
Georgia	47%	50%
North Carolina	49%	46%
West Virginia	30%	41%

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

INTENT TO VISIT IN NEXT 12 MONTHS

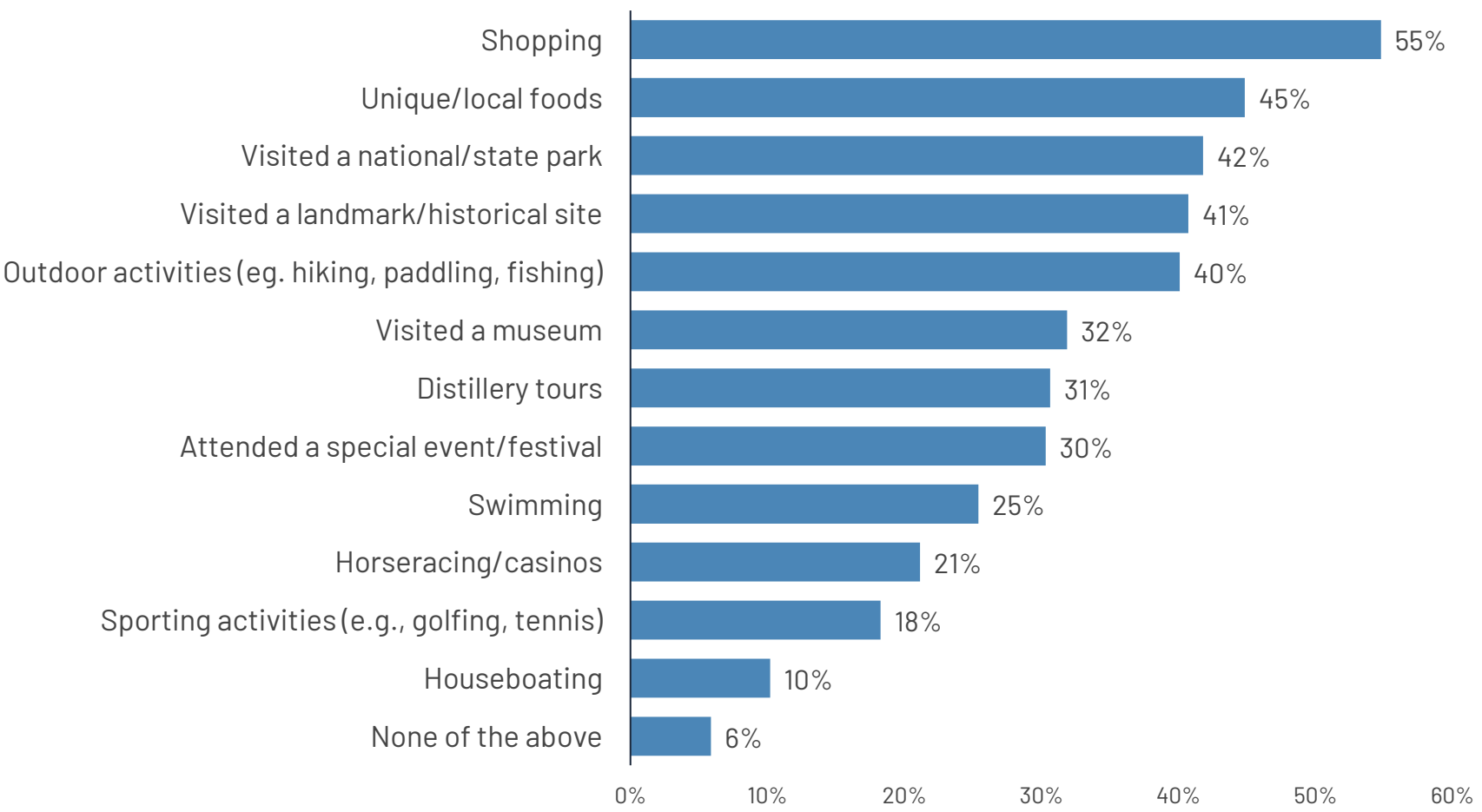


43% of respondents intend to visit Kentucky during the next 12 months.

	Probably or Definitely Will Visit Destination in Next 12 Months*
Tennessee	52%
Georgia	45%
North Carolina	44%
Kentucky	43%
Ohio	37%
Indiana	35%
West Virginia	31%

*On a day or overnight trip
Base: Total 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

Exciting

Adult Appeal

Family Atmosphere

Sightseeing

Unique

Worry-Free

Popular

Luxurious

Entertainment

Sports and Recreation

Affordable

Climate

TRAVEL MOTIVATOR GROUPINGS

Exciting

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

Adult Appeal

- Good for an adult vacation
- Good for couples

Family Atmosphere

- A good place for families to visit

Sightseeing

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

Unique

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

Worry-Free

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

Popular

- Popular with travelers
- Well-known destination
- Often notice advertising

Luxurious

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

Entertainment

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

Sports and Recreation

- Excellent national/state park facilities/conservation areas
- Great for outdoor recreation (e.g., hiking, backpacking, camping)
- 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

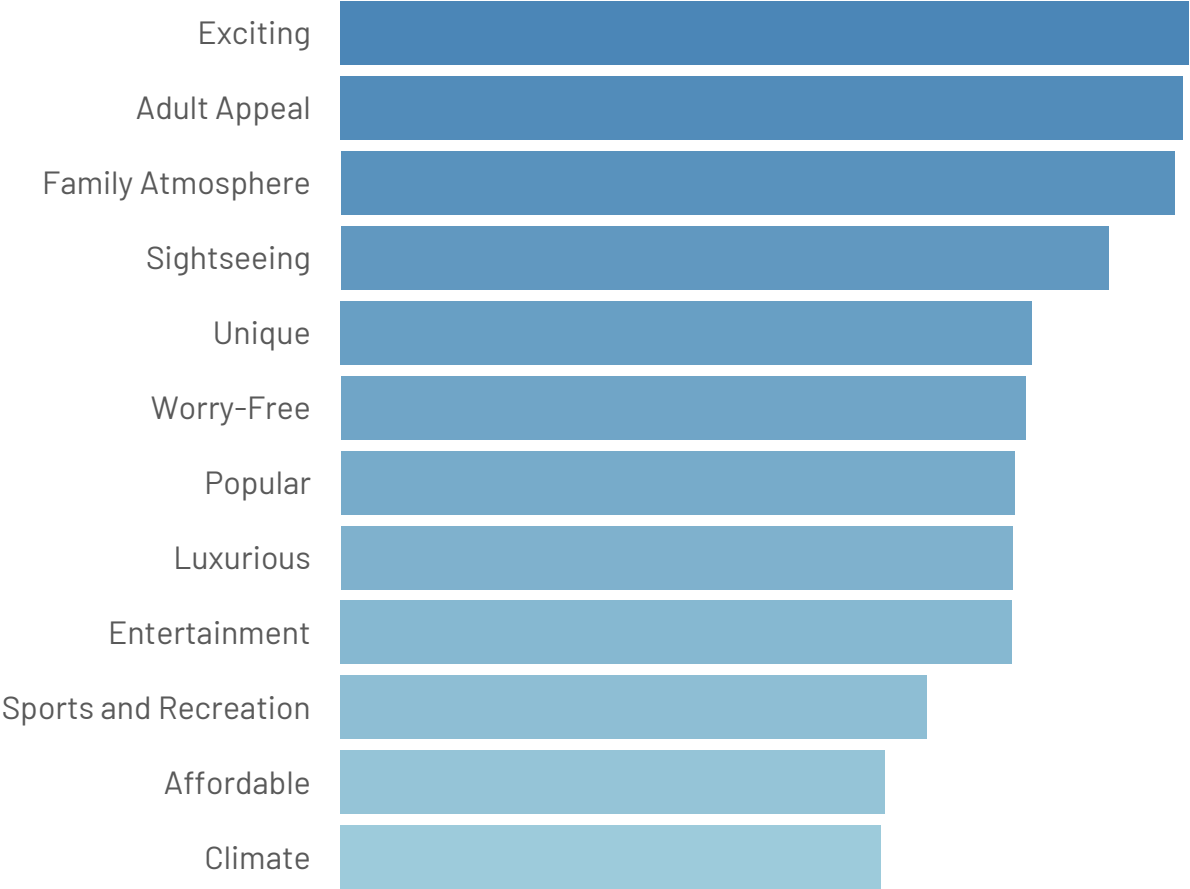
- Great climate overall
- Great for a warm weather vacation
- Great for a cold weather vacation

Kentucky's Travel Motivators

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

Other factors of moderate importance include uniqueness, a worry-free destination, popular amongst travelers, has luxury product offerings, and entertainment activities.

Lower priorities are sport and recreation, affordability, and the climate.



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



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

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

HOT BUTTONS

Is an interesting place

A fun place

Must see destination

Good for an adult vacation

Lots to see and do

A good place for families to visit

An exciting place

Good for couples

Unique travel experience

Good vacation packages

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

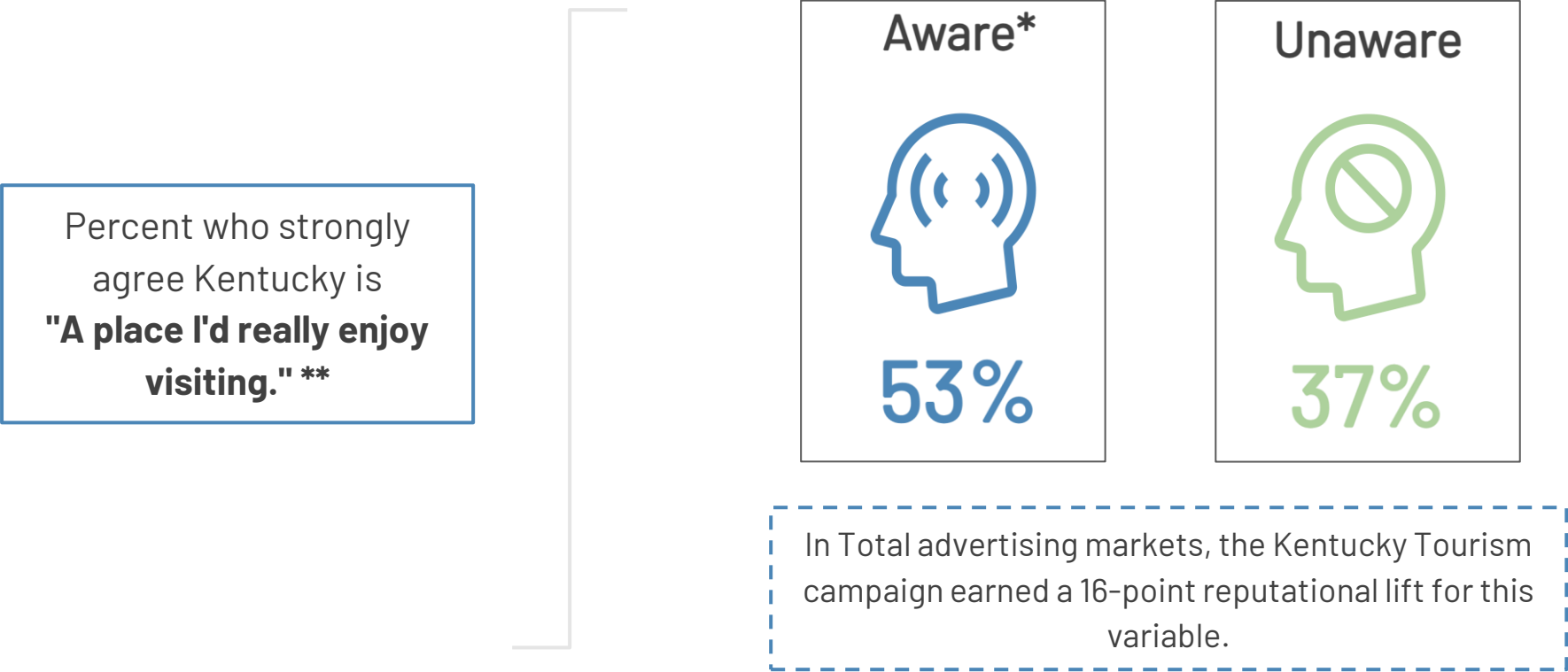


ADVERTISING IMPACT ON DESTINATION IMAGE



ADVERTISING IMPACT ON OVERALL DESTINATION IMAGE

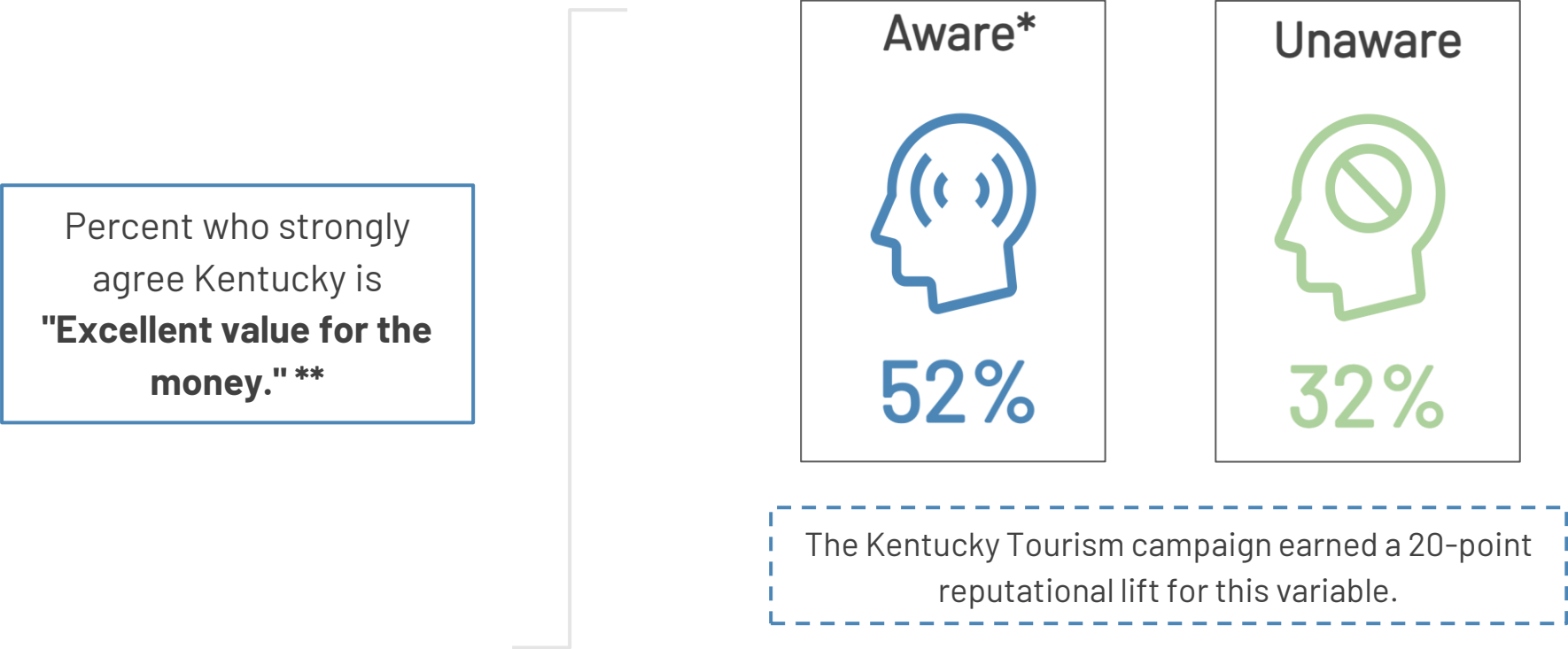
This campaign had a positive impact on travelers' perceptions of Kentucky. Travelers aware of the campaign gave the state a significantly higher rating than those unfamiliar with the campaign for the attribute **Kentucky is "a place I would really enjoy visiting"**.



*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: Total 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"**.



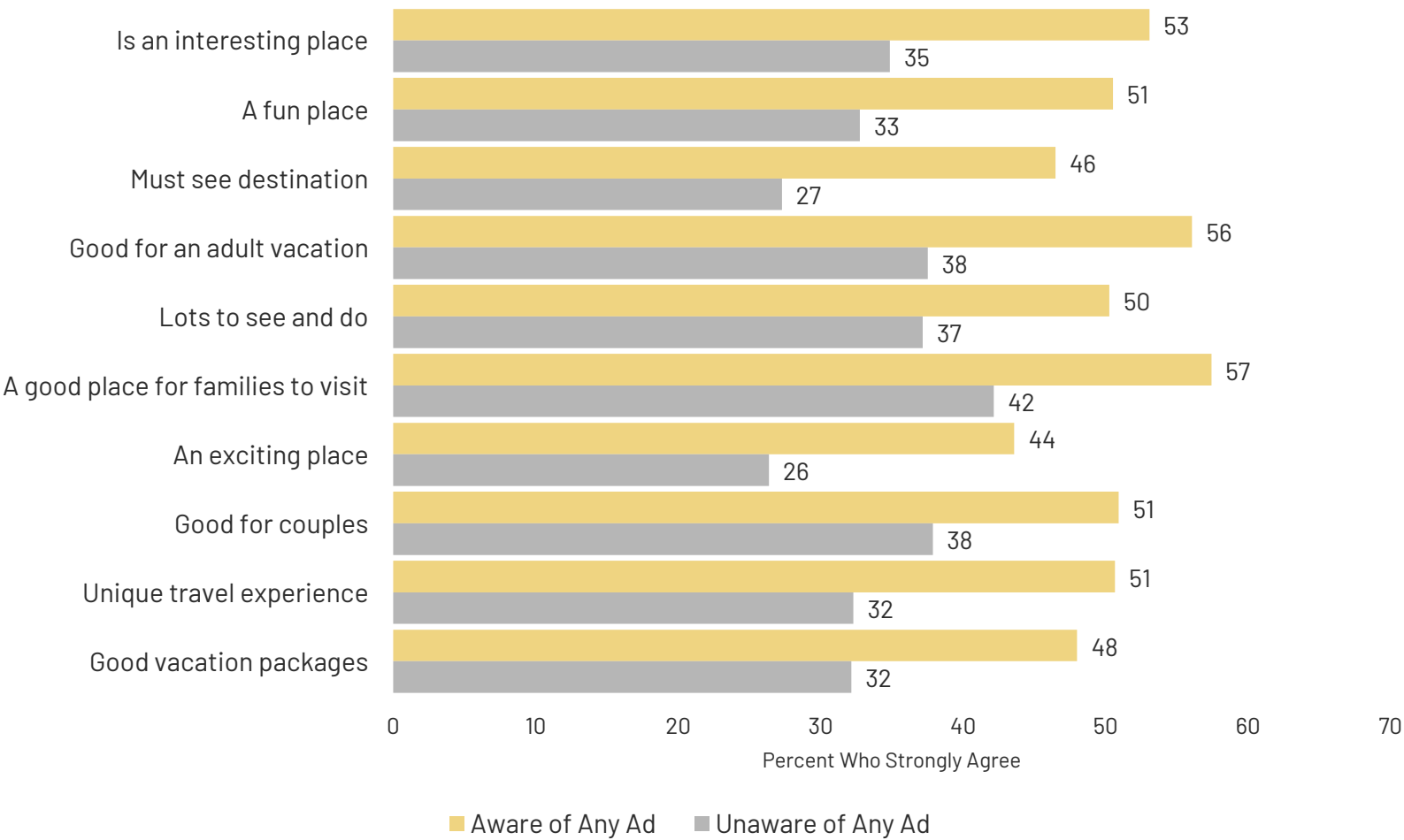
*Saw at least one ad
**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10
Base: Total Markets

ADVERTISING IMPACT ON HOT BUTTONS

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

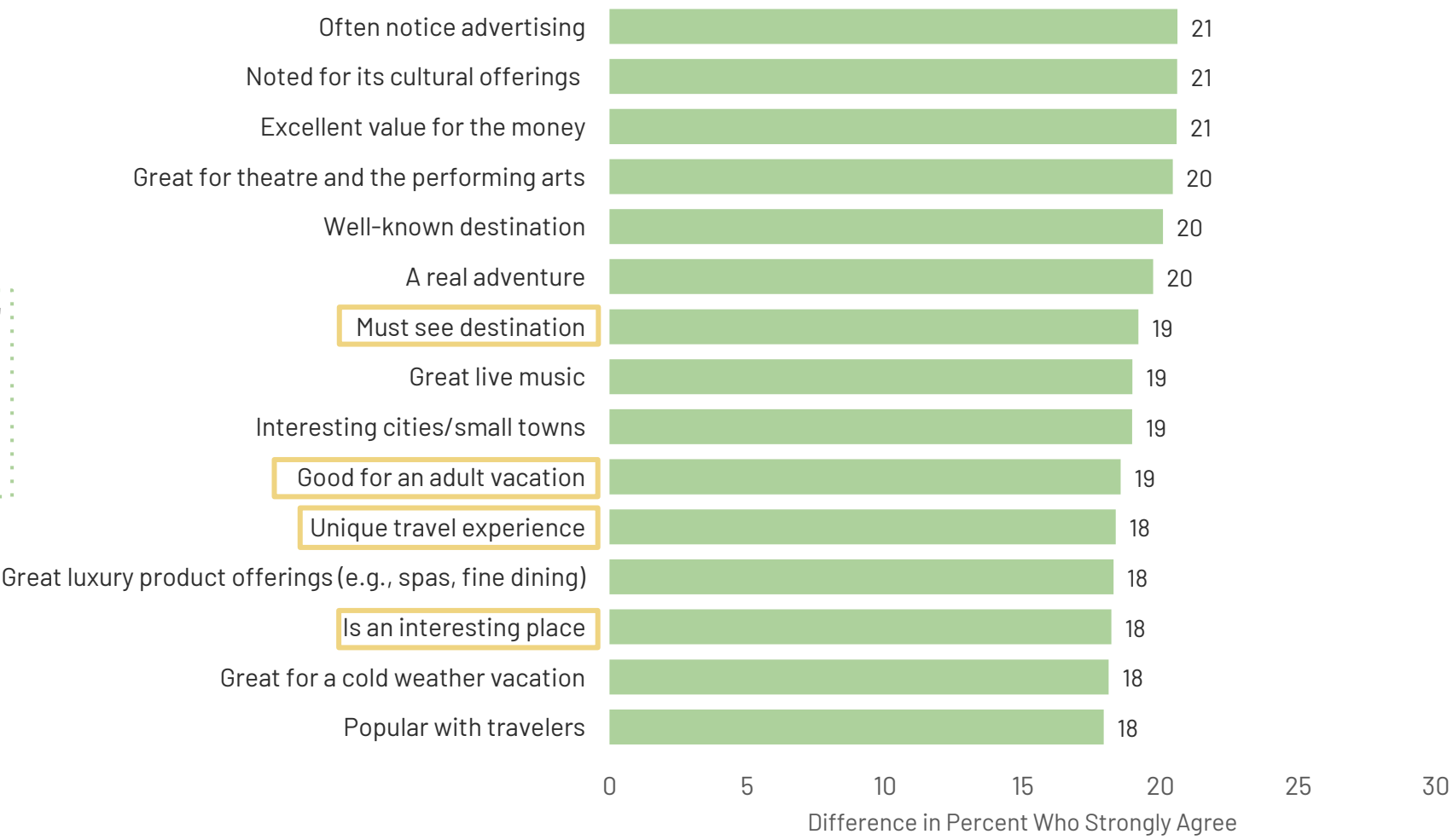
Total advertising market residents exposed to the campaign gave the destination higher rating scores than those unfamiliar with the campaign for all Hot Buttons.

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

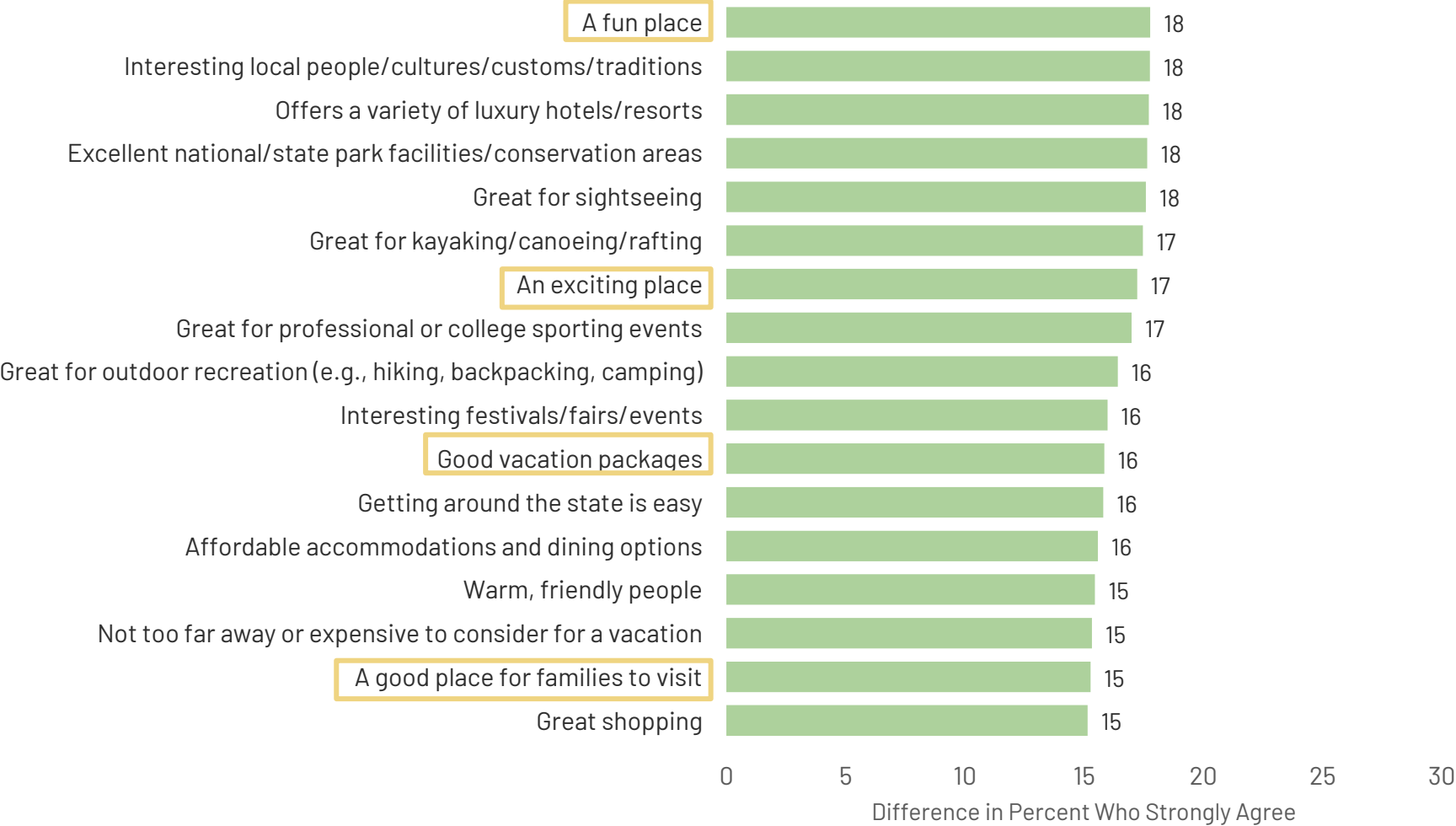
"Difference in Percent Who Strongly Agree"
is taken from comparing the destination
image ratings of respondents who are
Aware of Advertising vs.
Unaware of Advertising.



Hot Button

Base: Total Markets

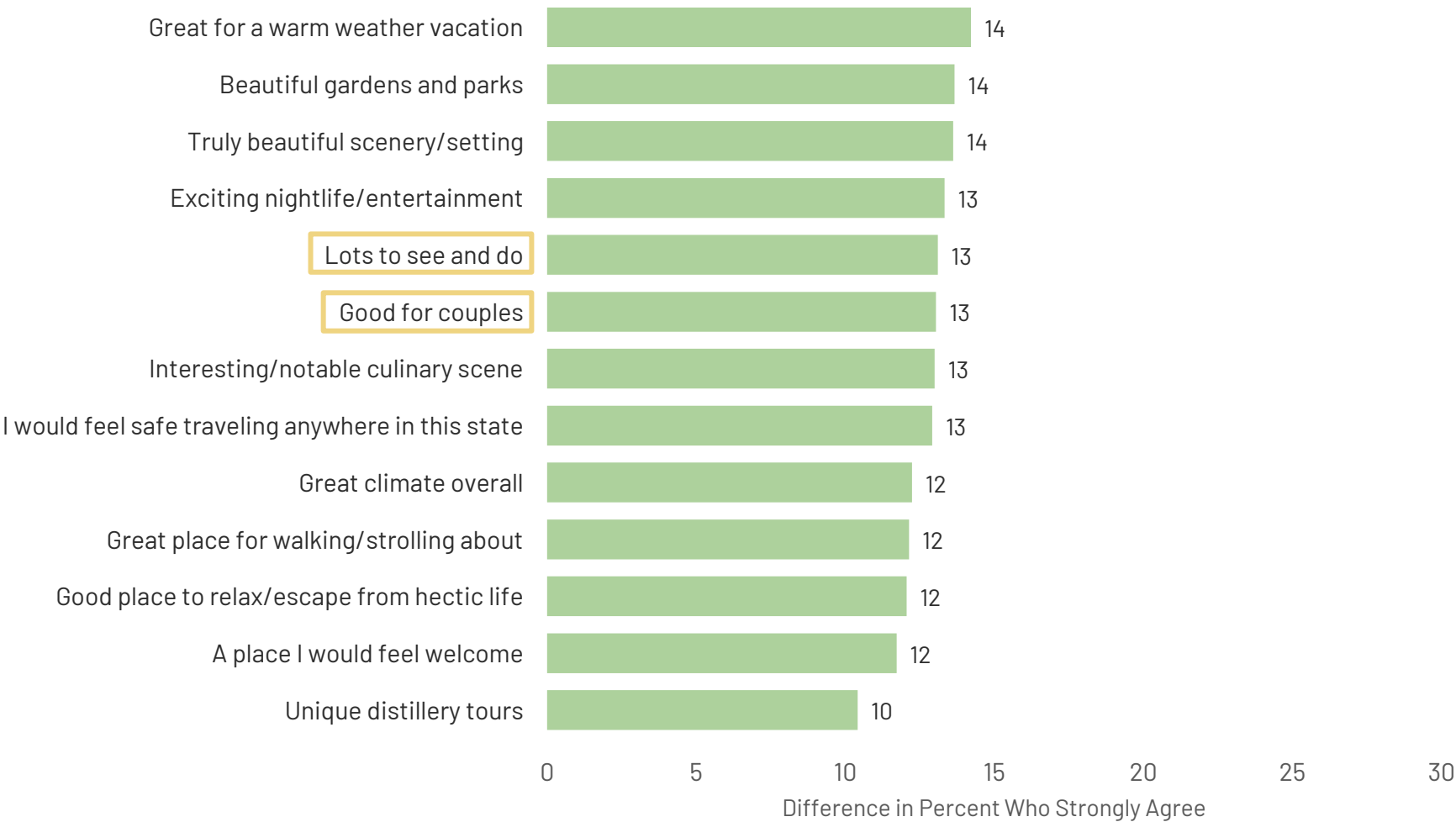
DESTINATION IMAGE MOST IMPACTED BY ADVERTISING (Cont'd)



Hot Button

Base: Total Markets

DESTINATION IMAGE MOST IMPACTED BY ADVERTISING (Cont'd)



Hot Button

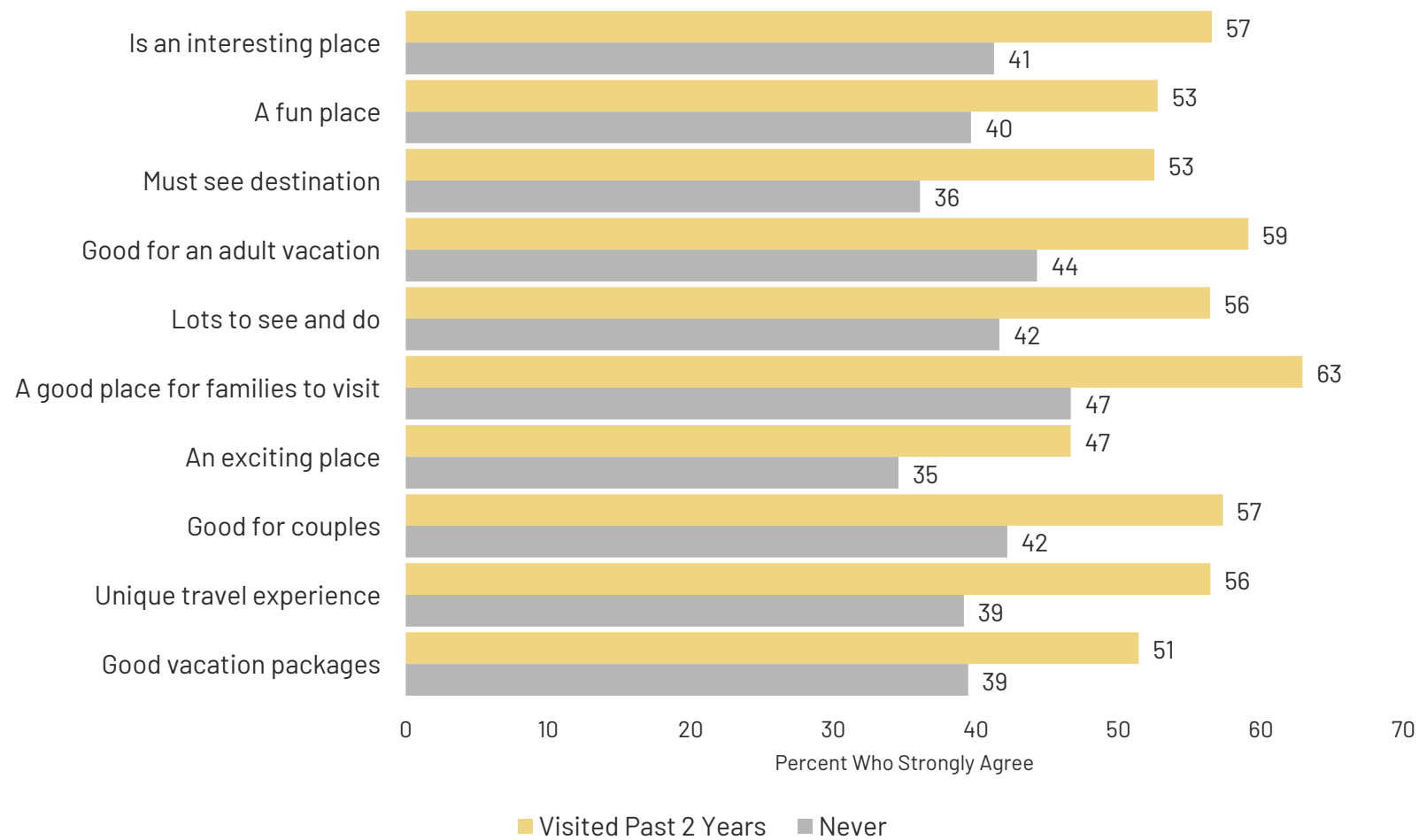
Base: Total Markets



[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

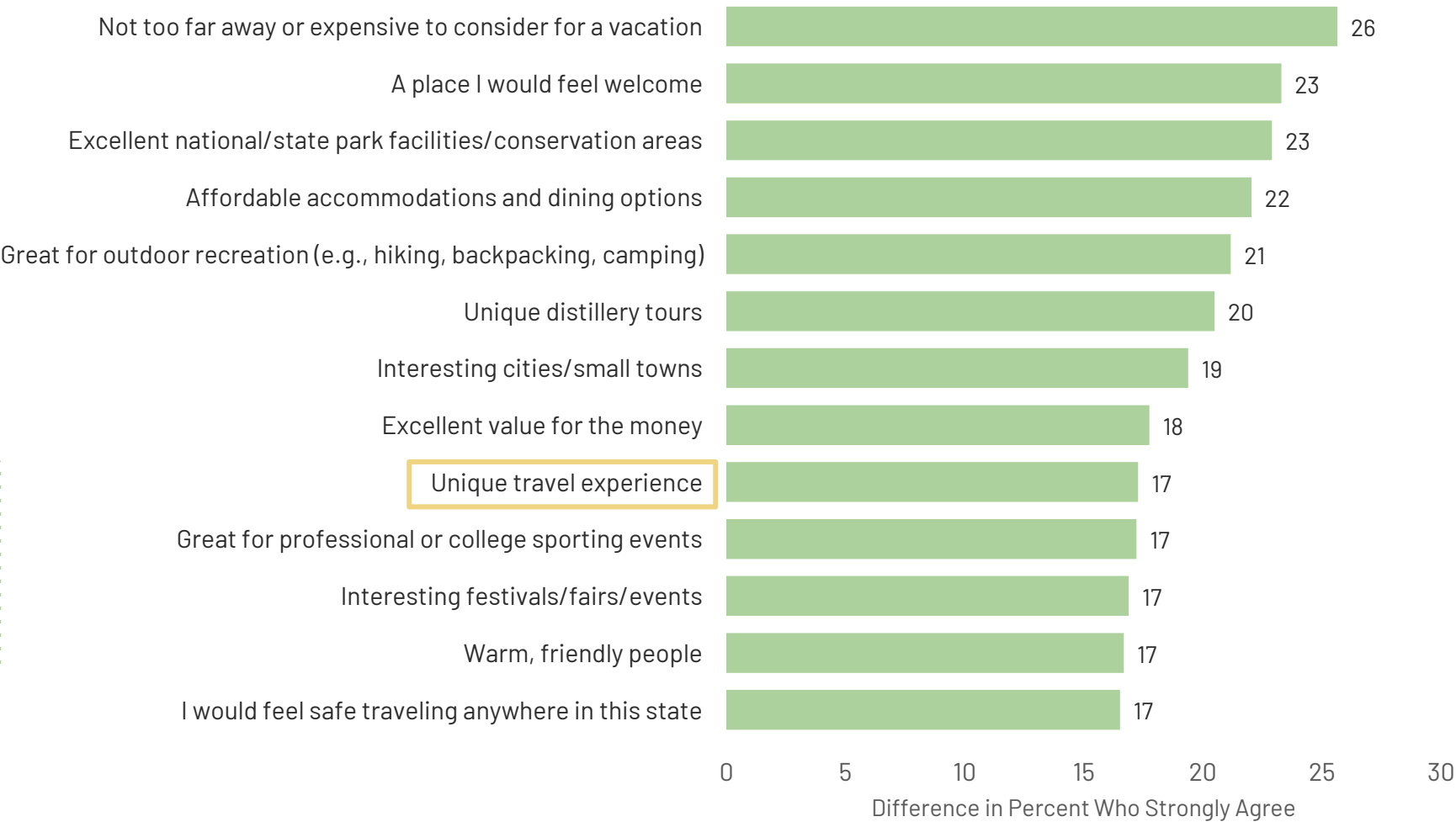


In Total markets, more recent Kentucky visitors than non-visitors rated the destination favorably in all 10 Hot Button attributes.

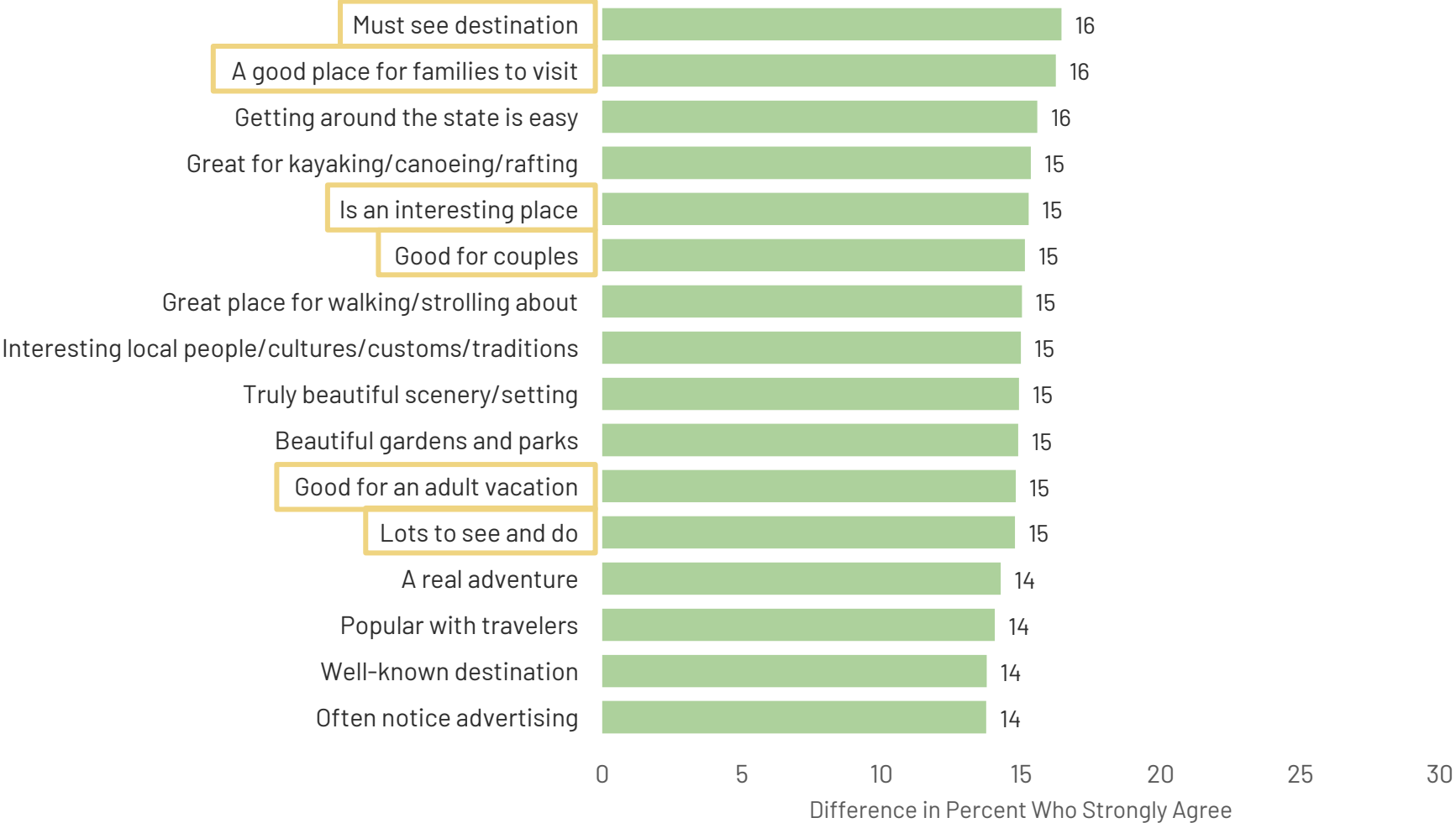
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of respondents **Who have Visited in the Past 2 Years** vs. those who have **Never Visited**.

Hot Button

Base: Total Markets



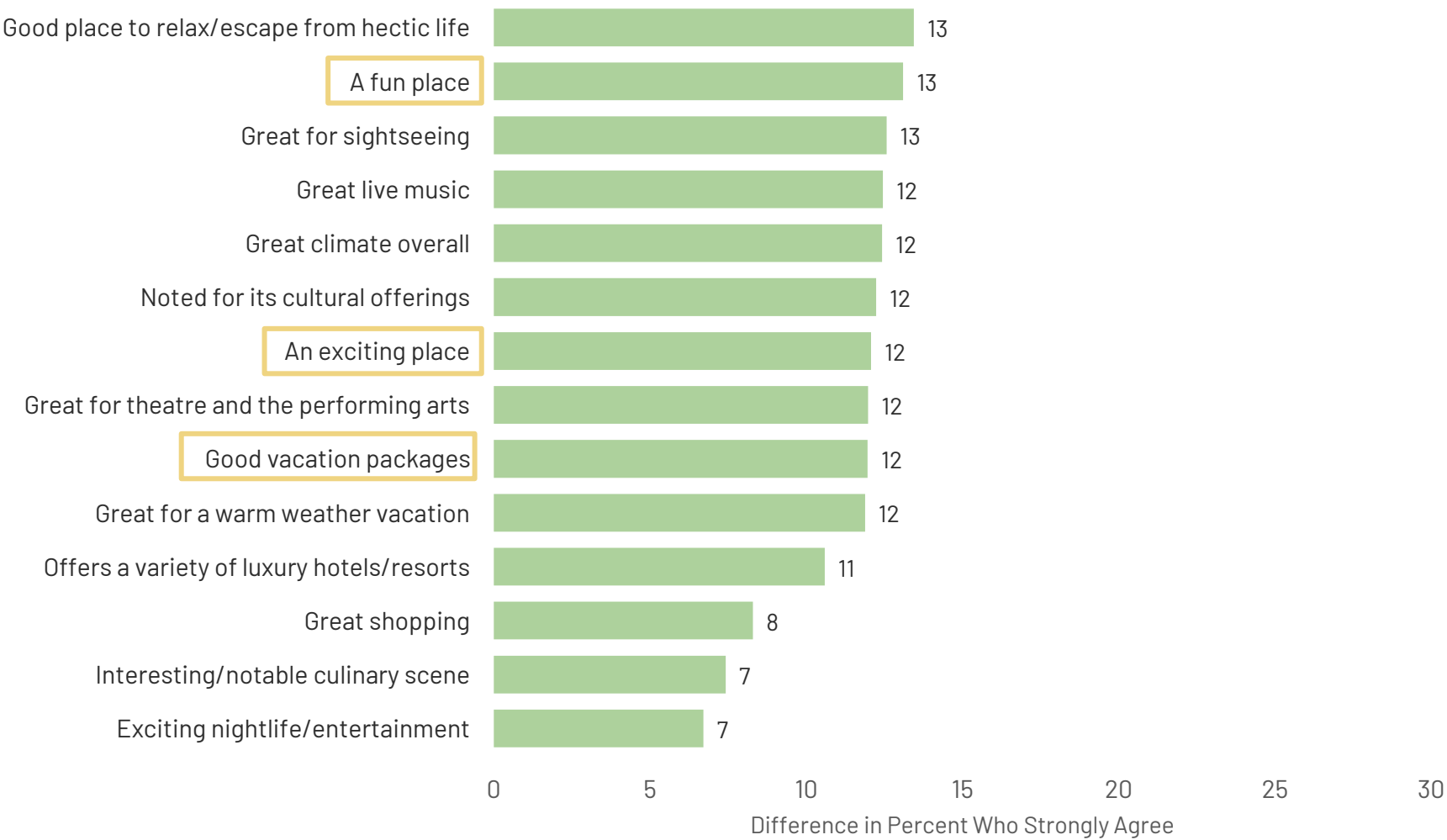
TOP PRODUCT STRENGTHS VS. DESTINATION IMAGE (Cont'd)



Hot Button

Base: Total Markets

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



Hot Button

Base: Total Markets

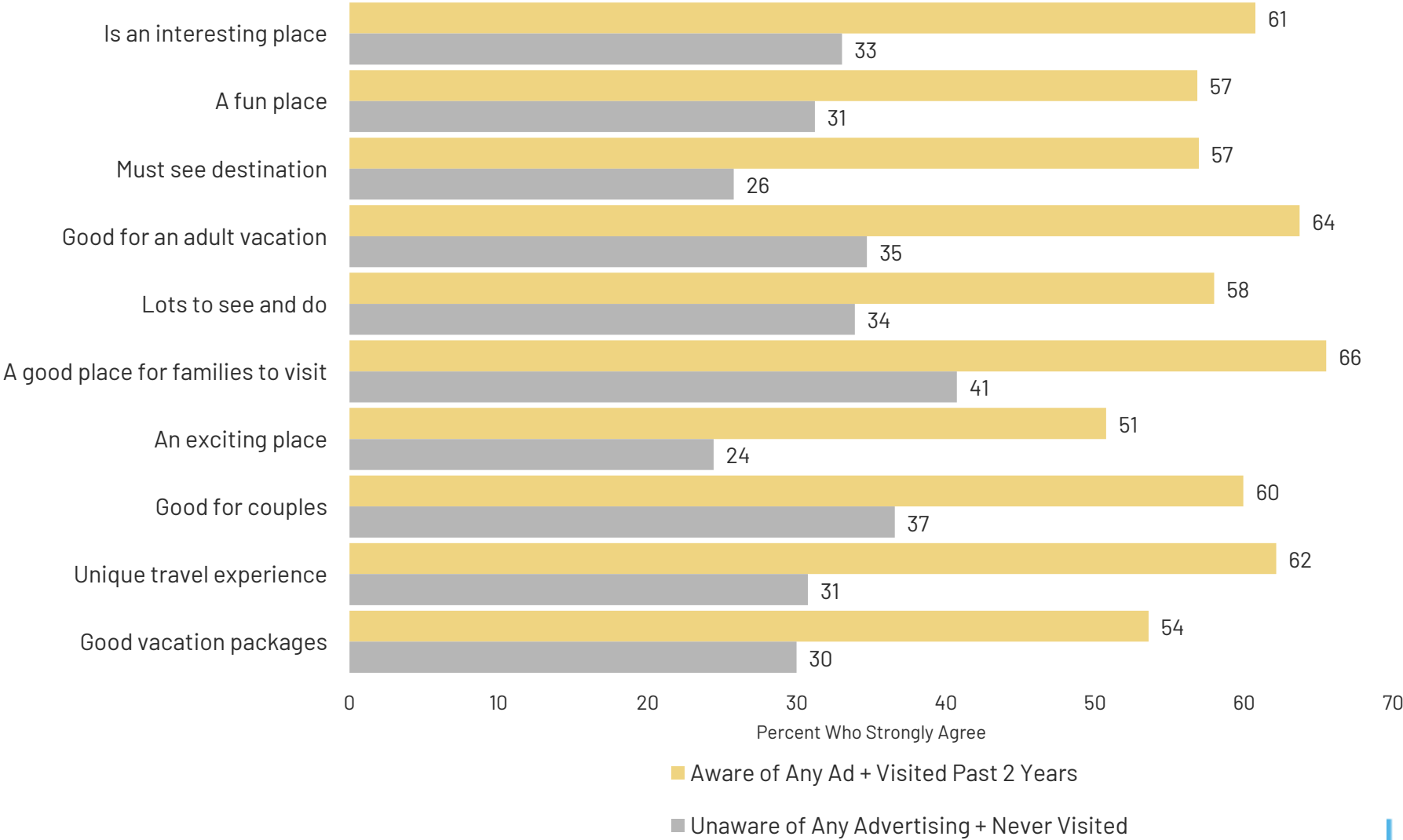
**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT WEAKNESSES
VS. DESTINATION IMAGE**



HOT BUTTONS: IMPACT OF AWARENESS AND VISITATION



IMPACT OF AD AWARENESS + VISITATION ON HOT BUTTONS

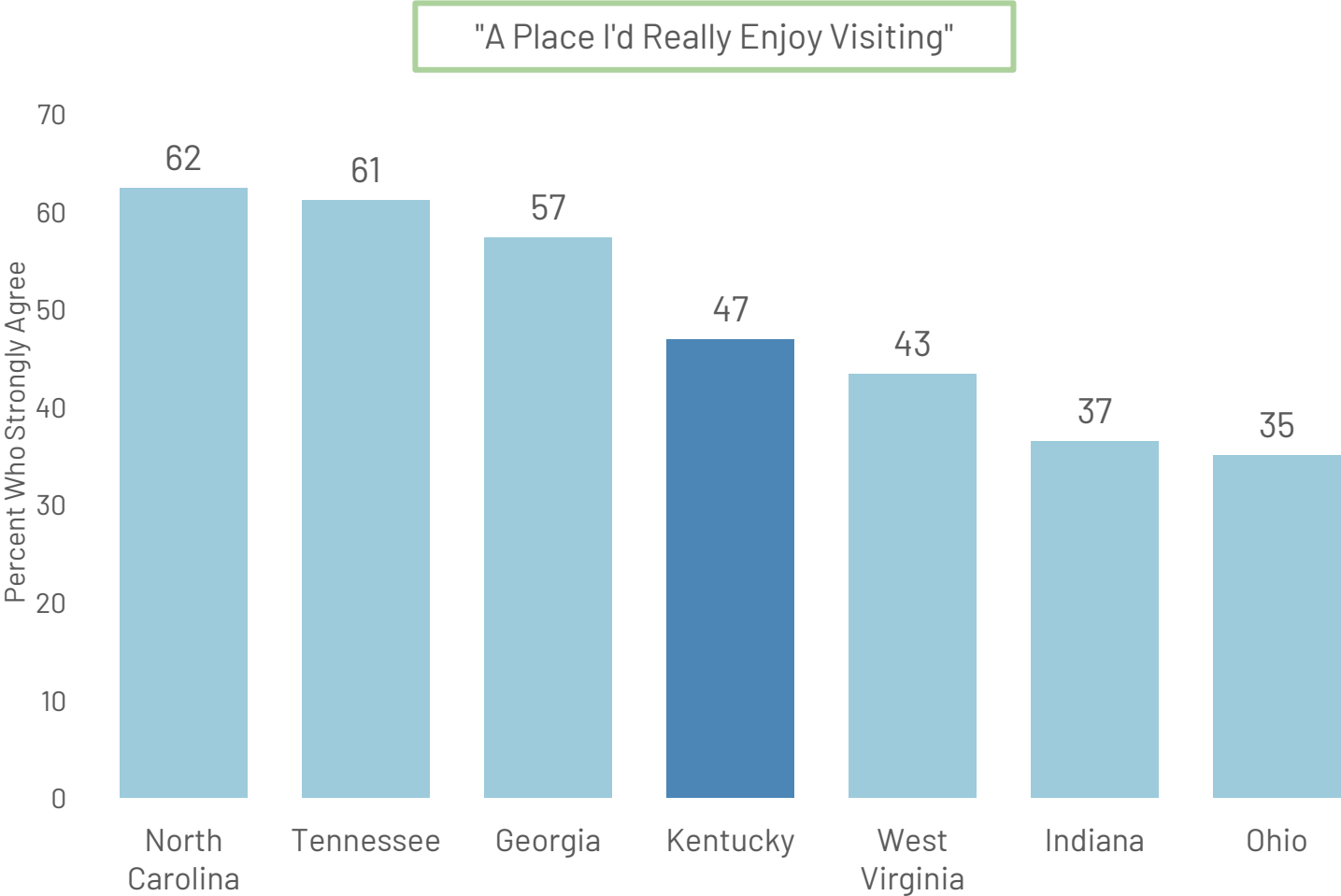




DESTINATION IMAGE
VS. THE COMPETITION



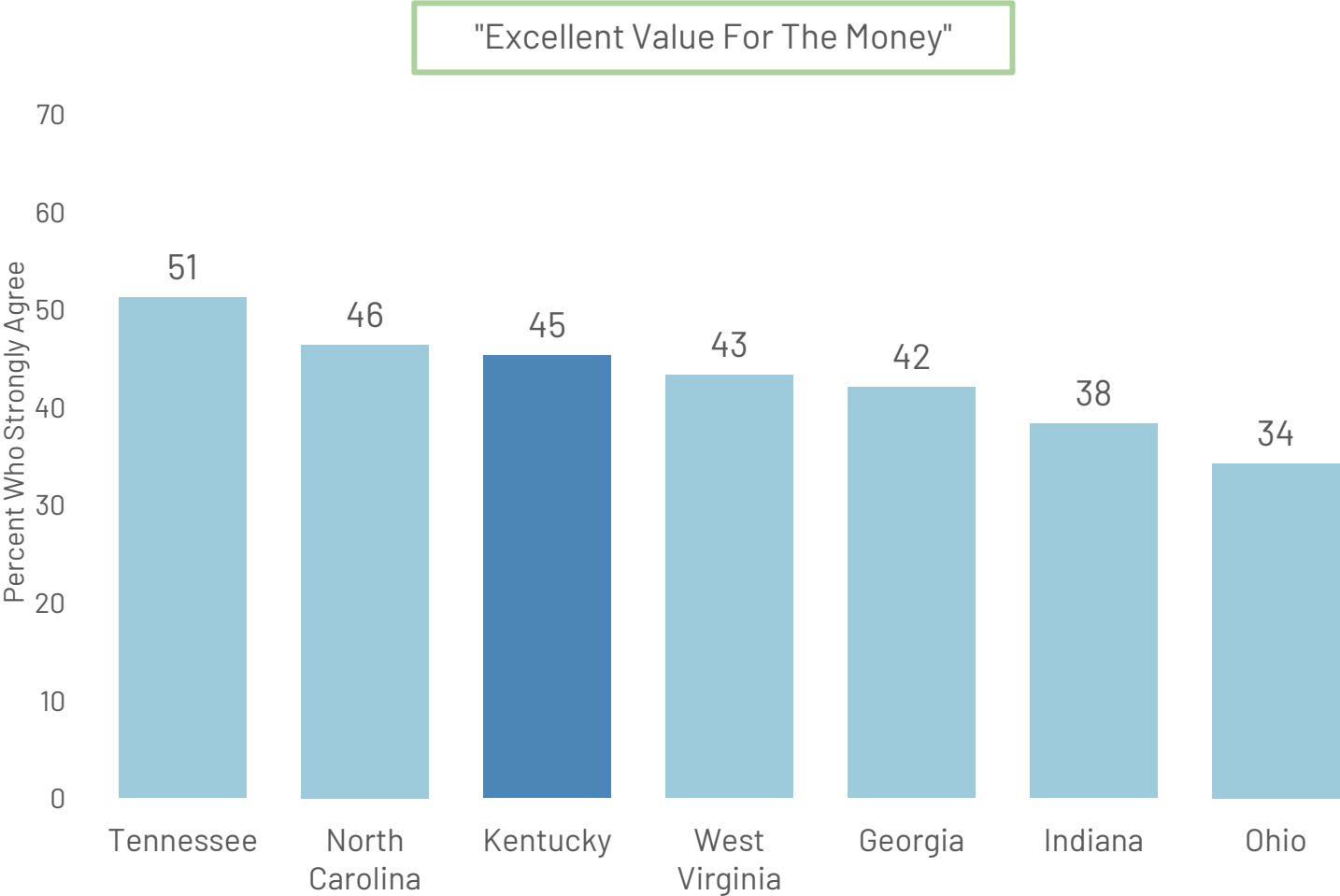
OVERALL DESTINATION IMAGE VS. COMPETITION



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

Across the Total advertising markets surveyed, about half (47%) rated Kentucky very favorably as a destination they “would really enjoy visiting.” Kentucky ranks in third place behind North Carolina (62%) & Tennessee (61%), Georgia (57%), and ahead of West Virginia (43%), Indiana (37%), and Ohio (35%).

OVERALL IMAGE VS. COMPETITION

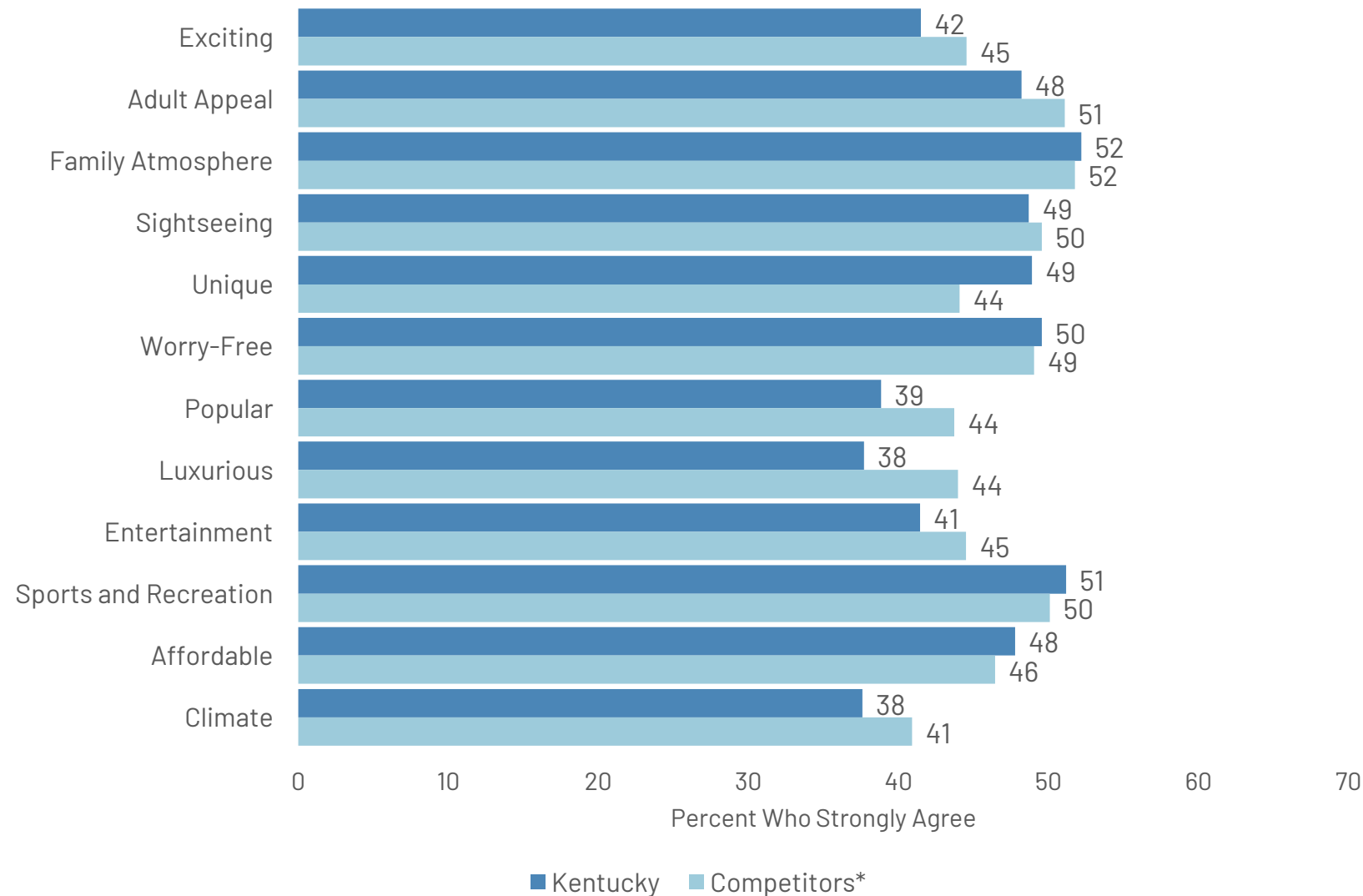


Amongst the competitive destinations included in this study, Kentucky ranks more favorably as a destination that offers excellent value for the money.

Across the Total advertising markets surveyed, over four in ten (45%) rated Kentucky very favorably as a destination that has "excellent value for the money." Kentucky ranks in second place, tied with North Carolina (46%) & West Virginia (43%), behind Tennessee (51%), and ahead of Georgia (42%), Indiana (38%), and Ohio (34%).

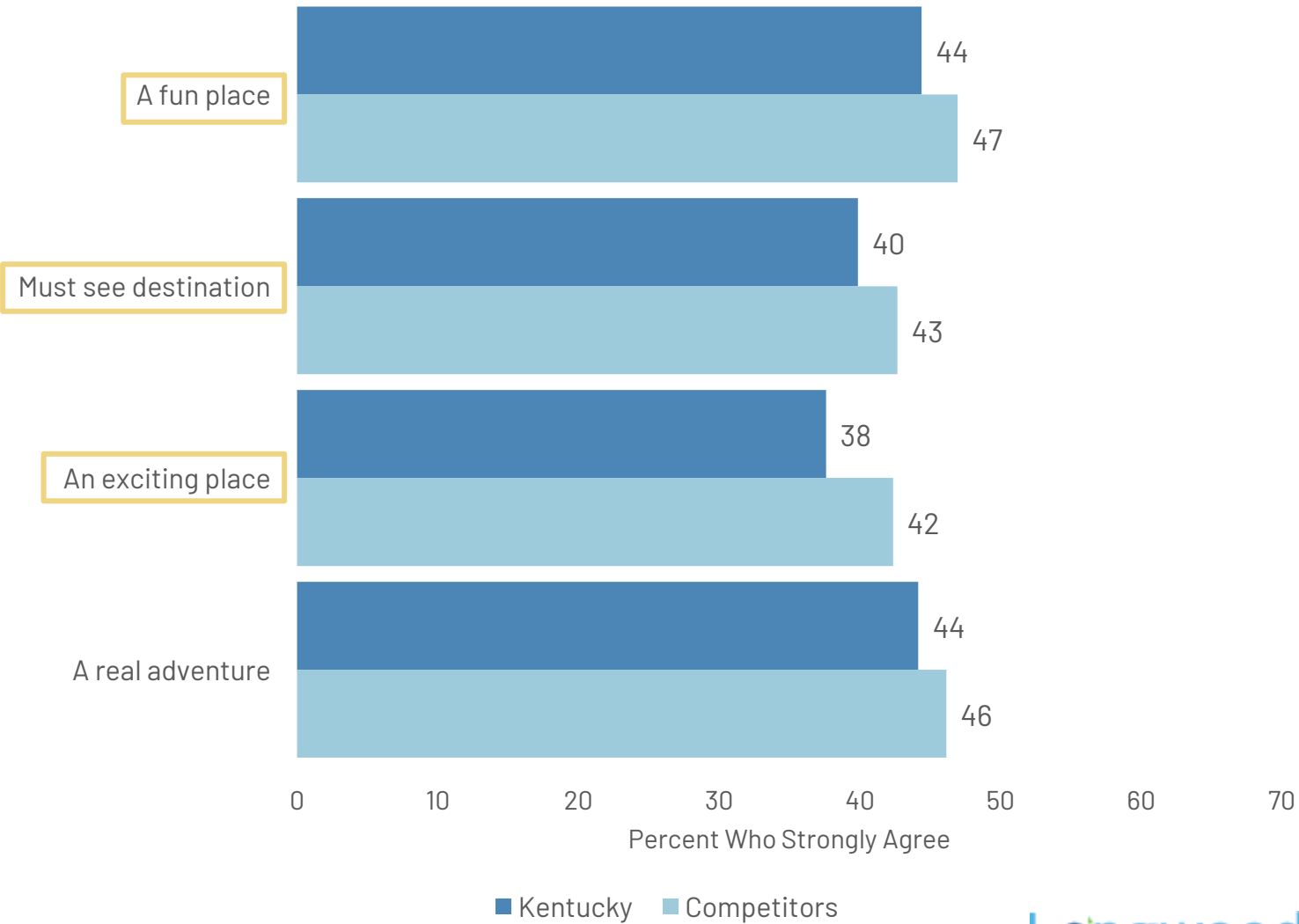
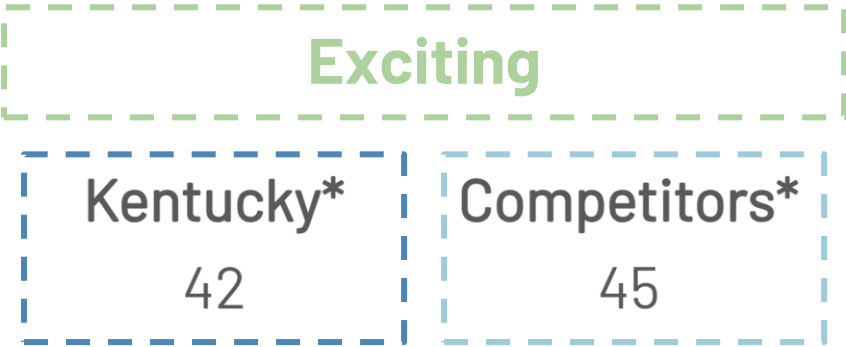
OVERALL DESTINATION IMAGE VS. COMPETITION

Kentucky is tied with its combined competitive set in eight of the twelve Travel Motivator categories in Total markets. Kentucky overperforms versus its combined competitive set for unique, but underperforms for popular, luxurious, and entertainment.



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

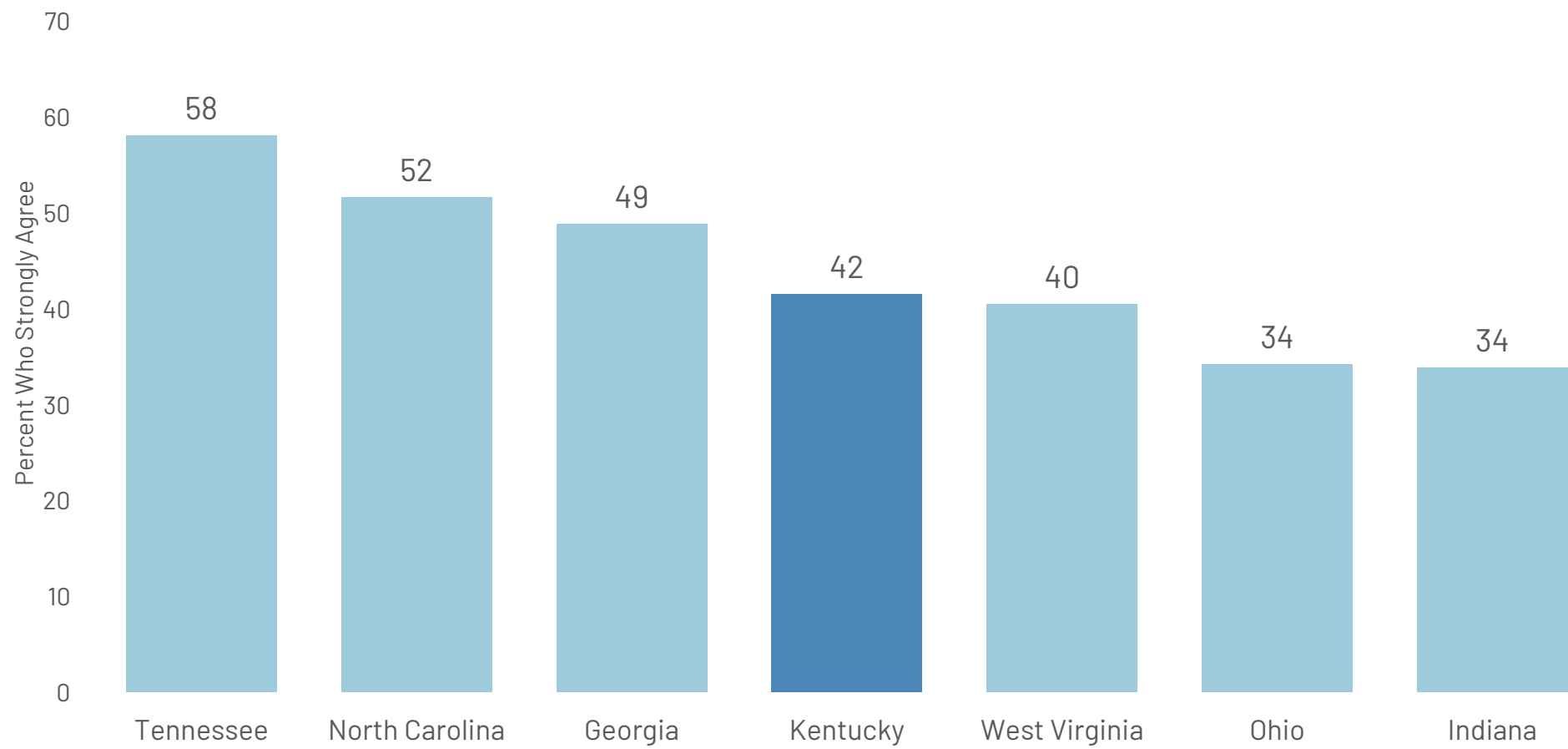
DESTINATION IMAGE VS. COMPETITION - EXCITING



Hot Button

*Percent who strongly agree
Base: Total Markets

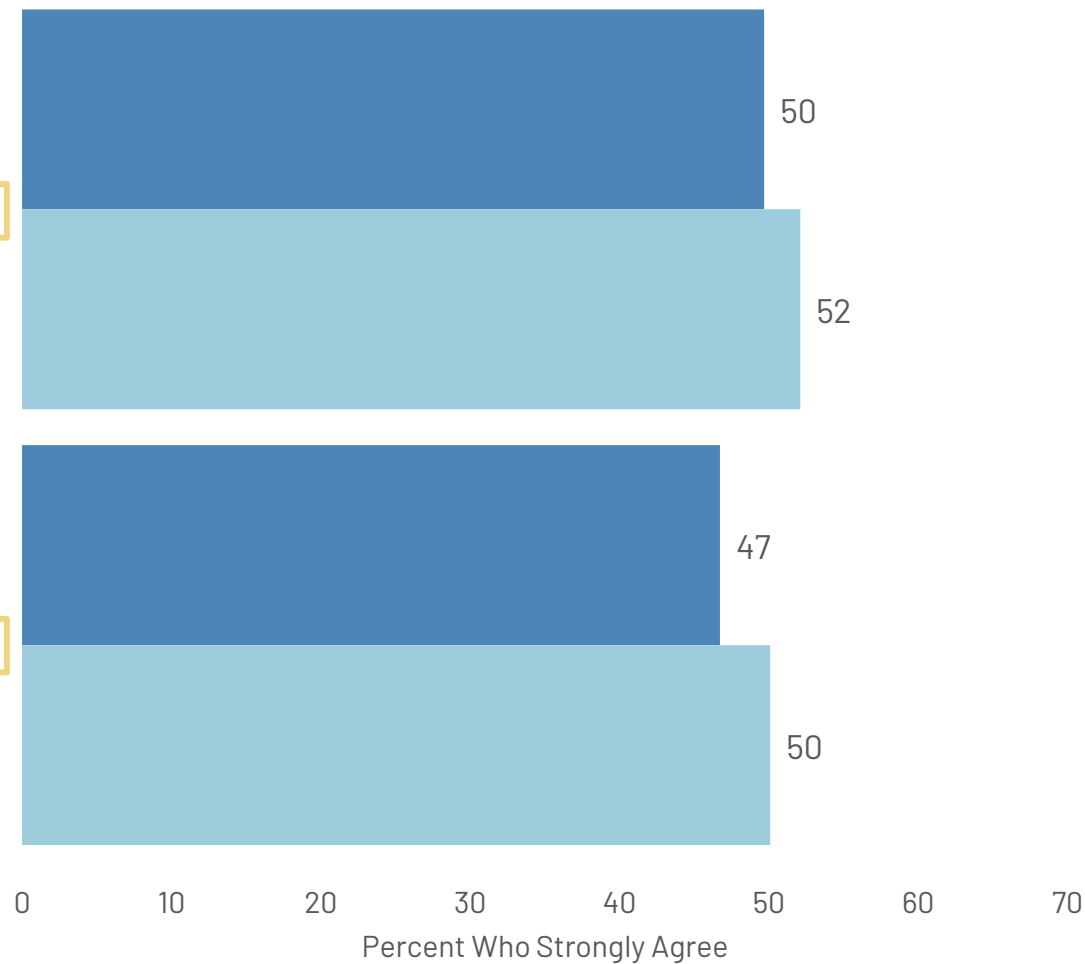
DESTINATION IMAGE VS. COMPETITION - EXCITING



DESTINATION IMAGE VS. COMPETITION - ADULT APPEAL



Good for an adult vacation



Adult Appeal

Kentucky*

48

Competitors*

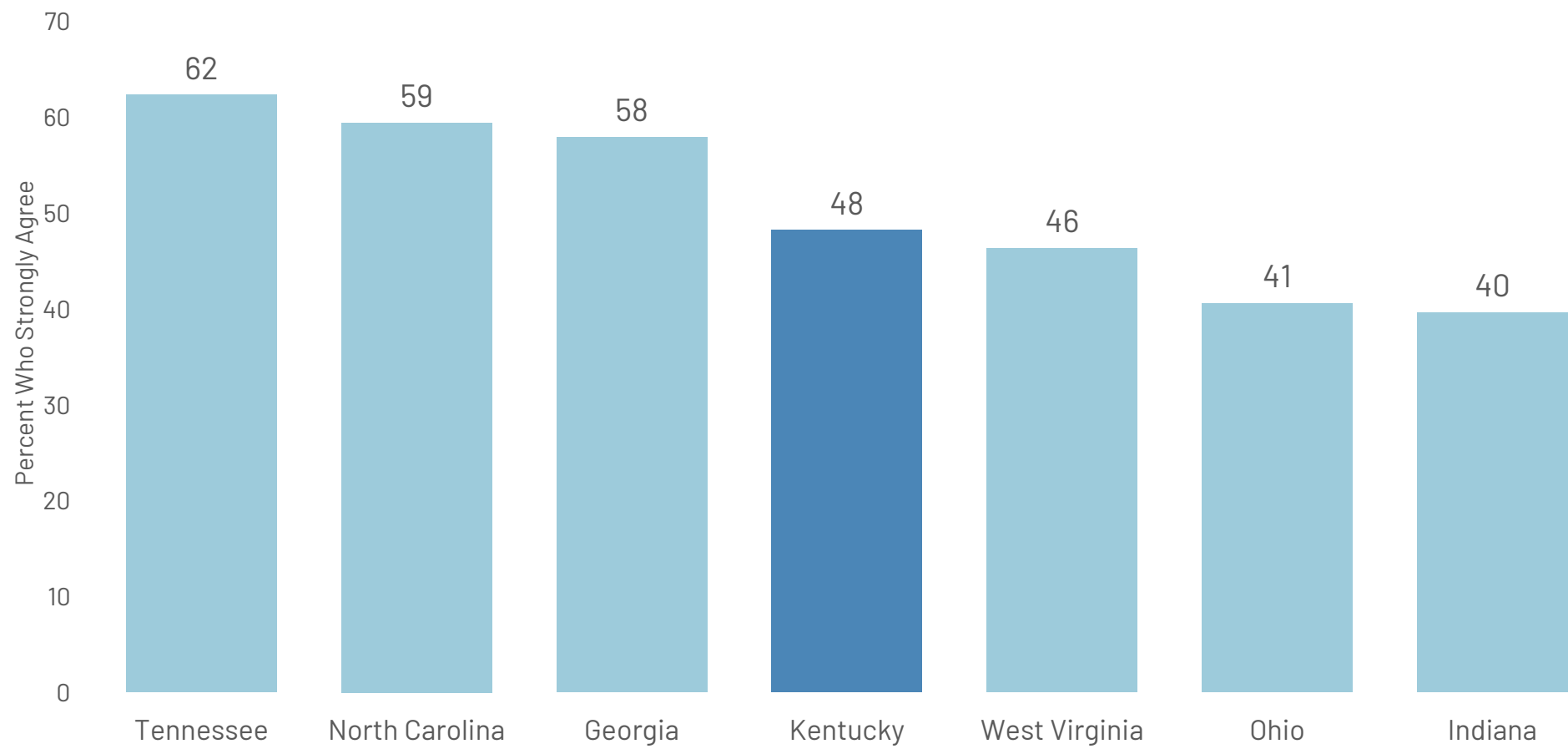
51

Hot Button

*Percent who strongly agree
Base: Total Markets

Kentucky Competitors

DESTINATION IMAGE VS. COMPETITION – ADULT APPEAL



DESTINATION IMAGE VS. COMPETITION - FAMILY ATMOSPHERE



A good place for families to visit

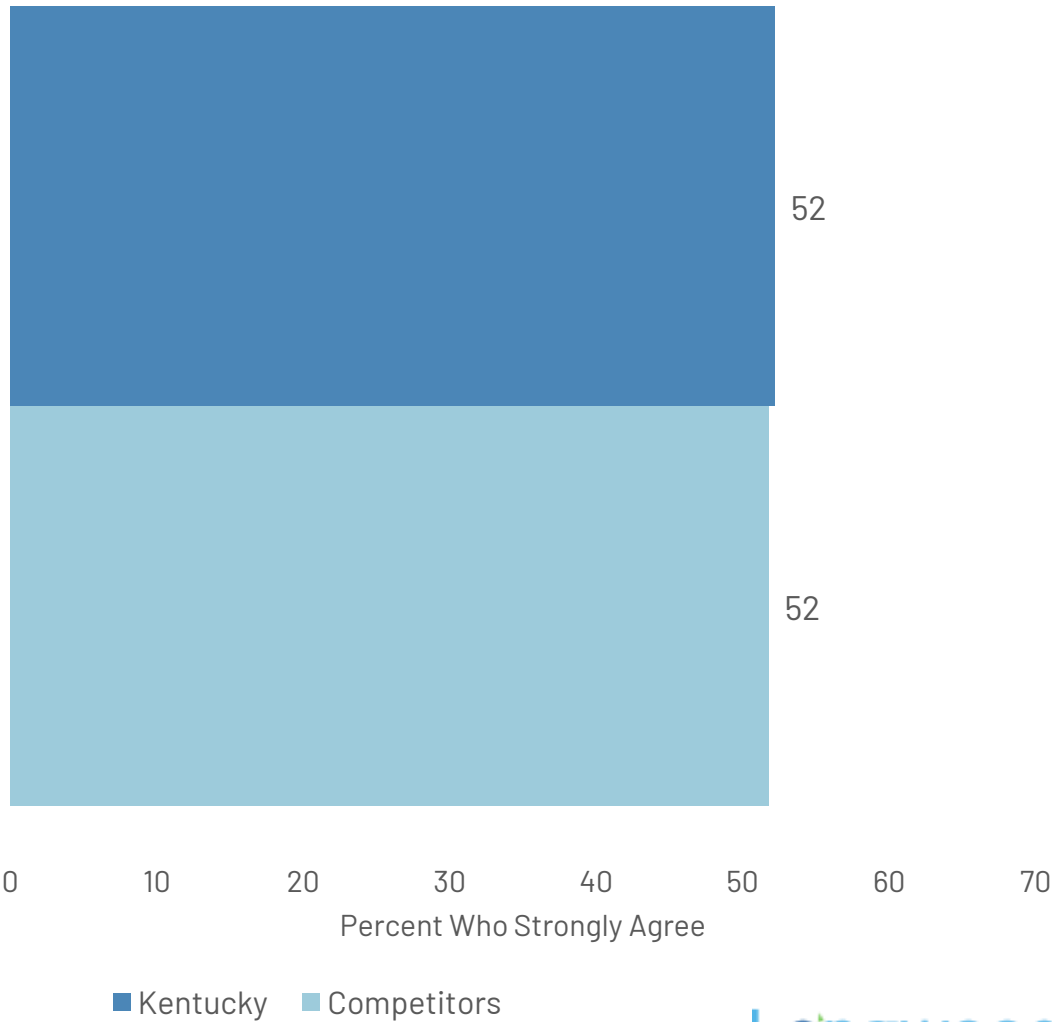
Family Atmosphere

Kentucky*

52

Competitors*

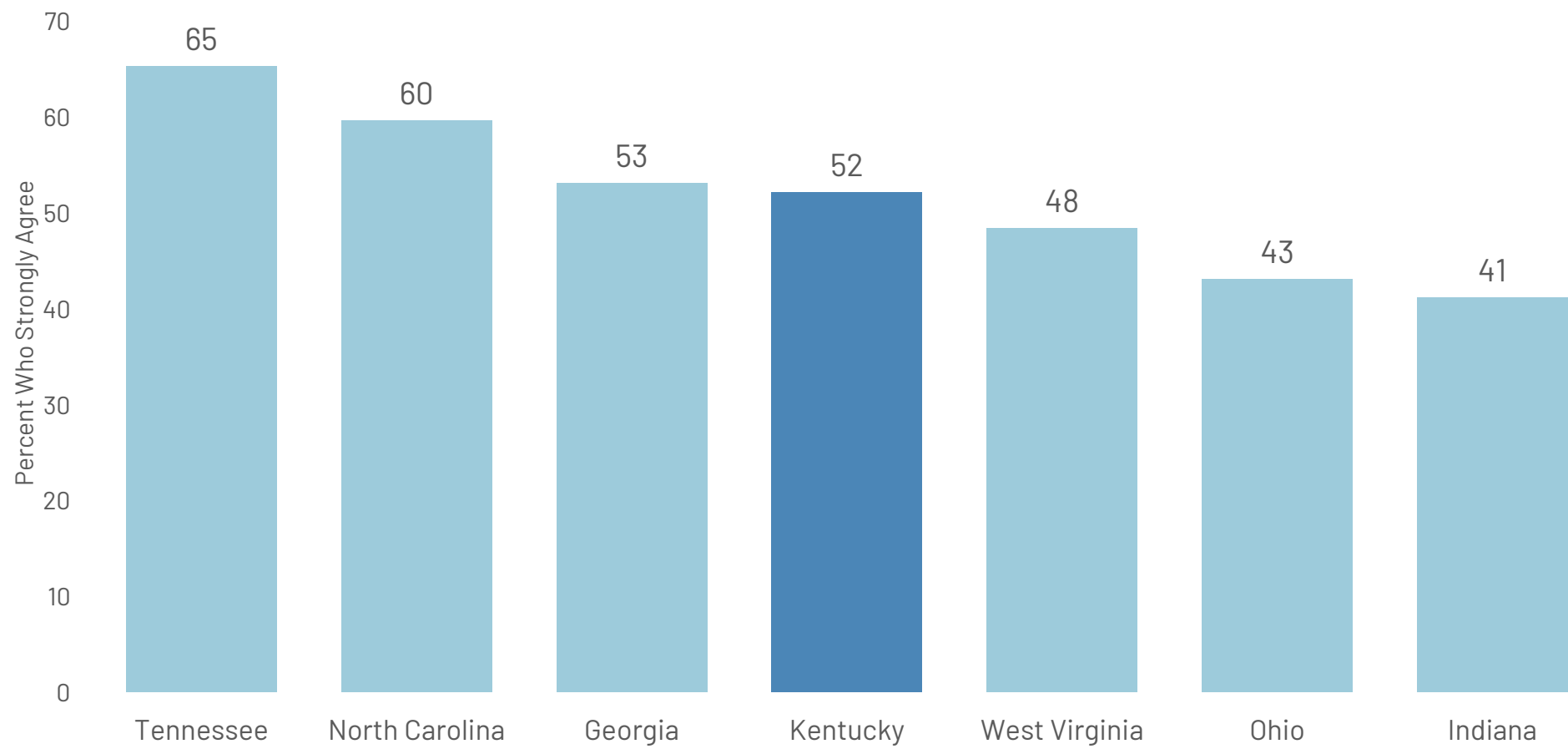
52



Hot Button

*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION – FAMILY ATMOSPHERE



DESTINATION IMAGE VS. COMPETITION - SIGHTSEEING



Sightseeing

Kentucky*

49

Competitors*

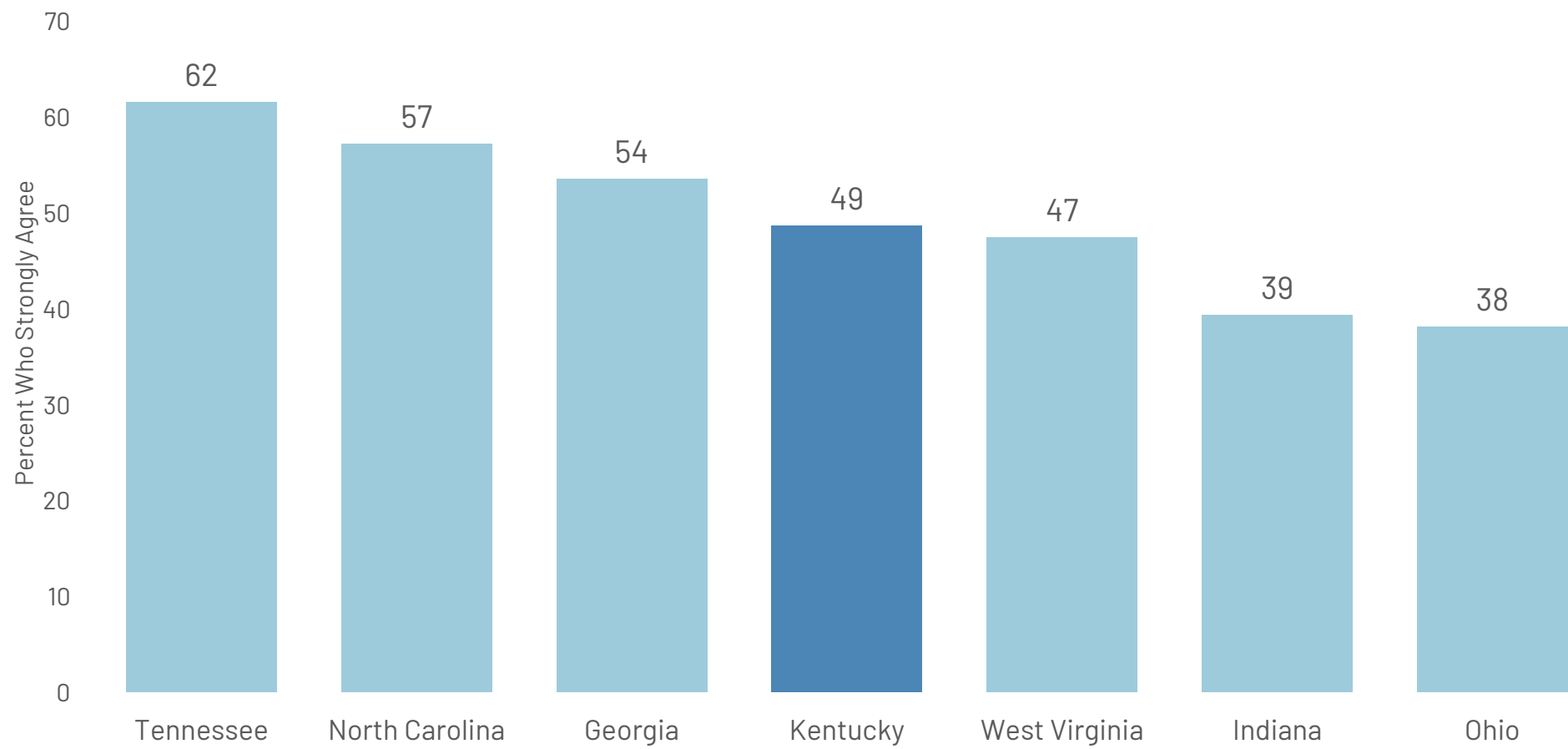
50

Hot Button

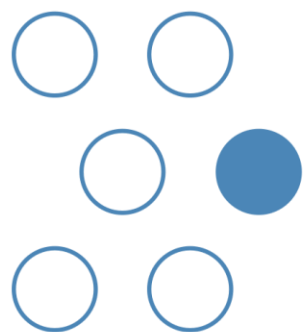
*Percent who strongly agree
Base: Total Markets



DESTINATION IMAGE VS. COMPETITION – SIGHTSEEING



DESTINATION IMAGE VS. COMPETITION - UNIQUE



Unique

Kentucky*

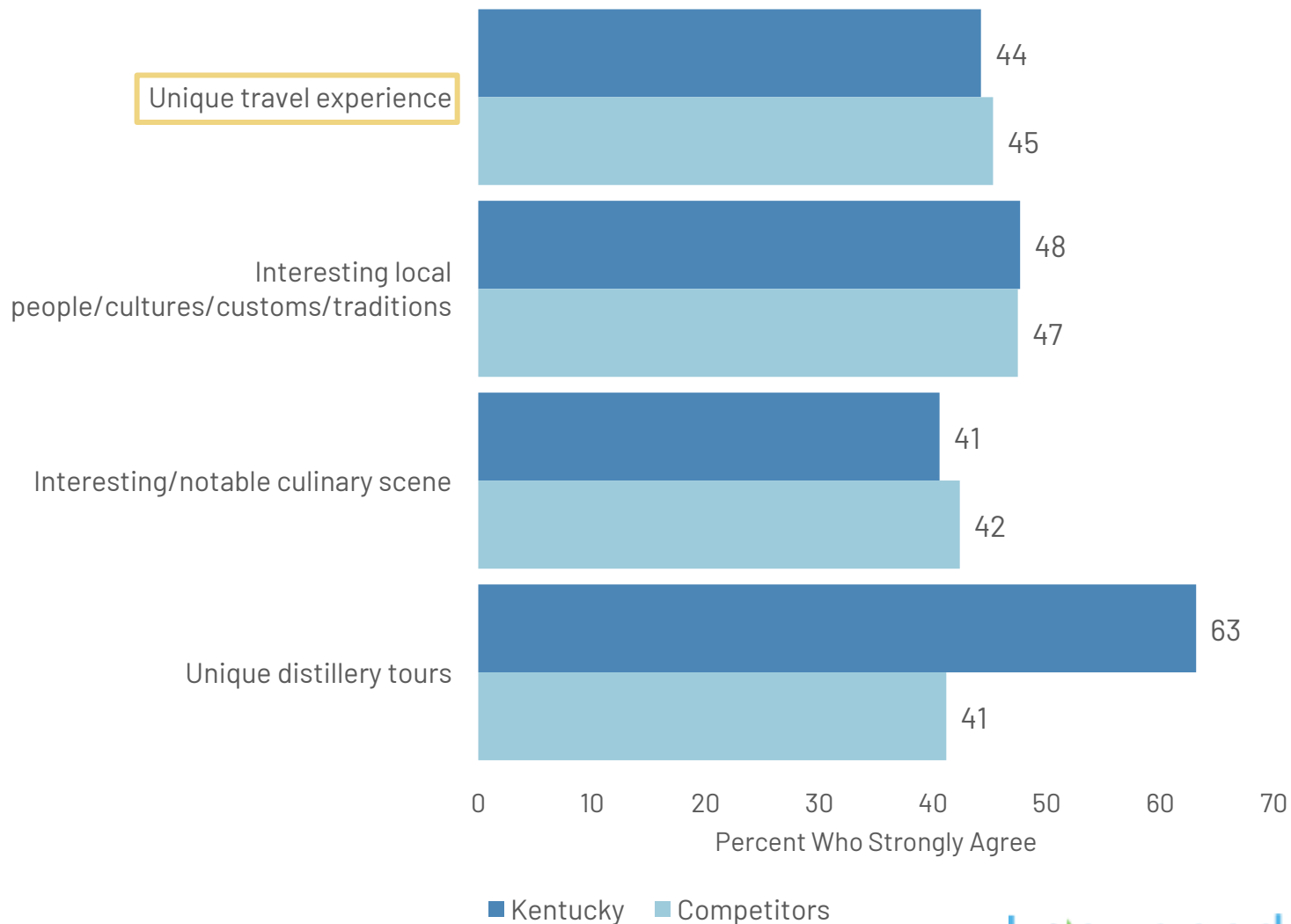
49

Competitors*

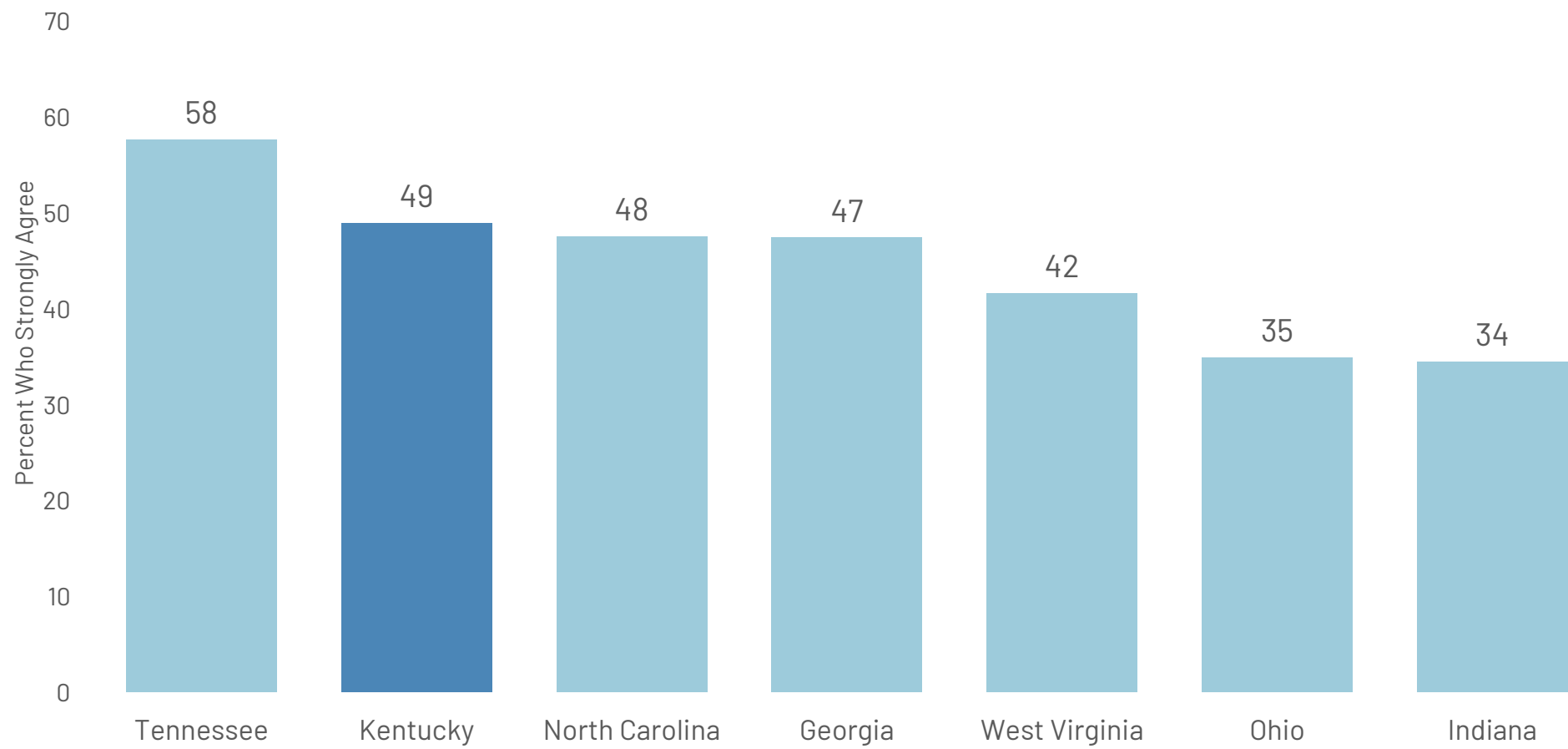
44

Hot Button

*Percent who strongly agree
Base: Total Markets



DESTINATION IMAGE VS. COMPETITION - UNIQUE



DESTINATION IMAGE VS. COMPETITION - WORRY-FREE



Worry-Free

Kentucky*

50

Competitors*

49

Good place to relax/escape from hectic life

50

49

A place I would feel welcome

50

51

Warm, friendly people

52

50

Getting around the state is easy

45

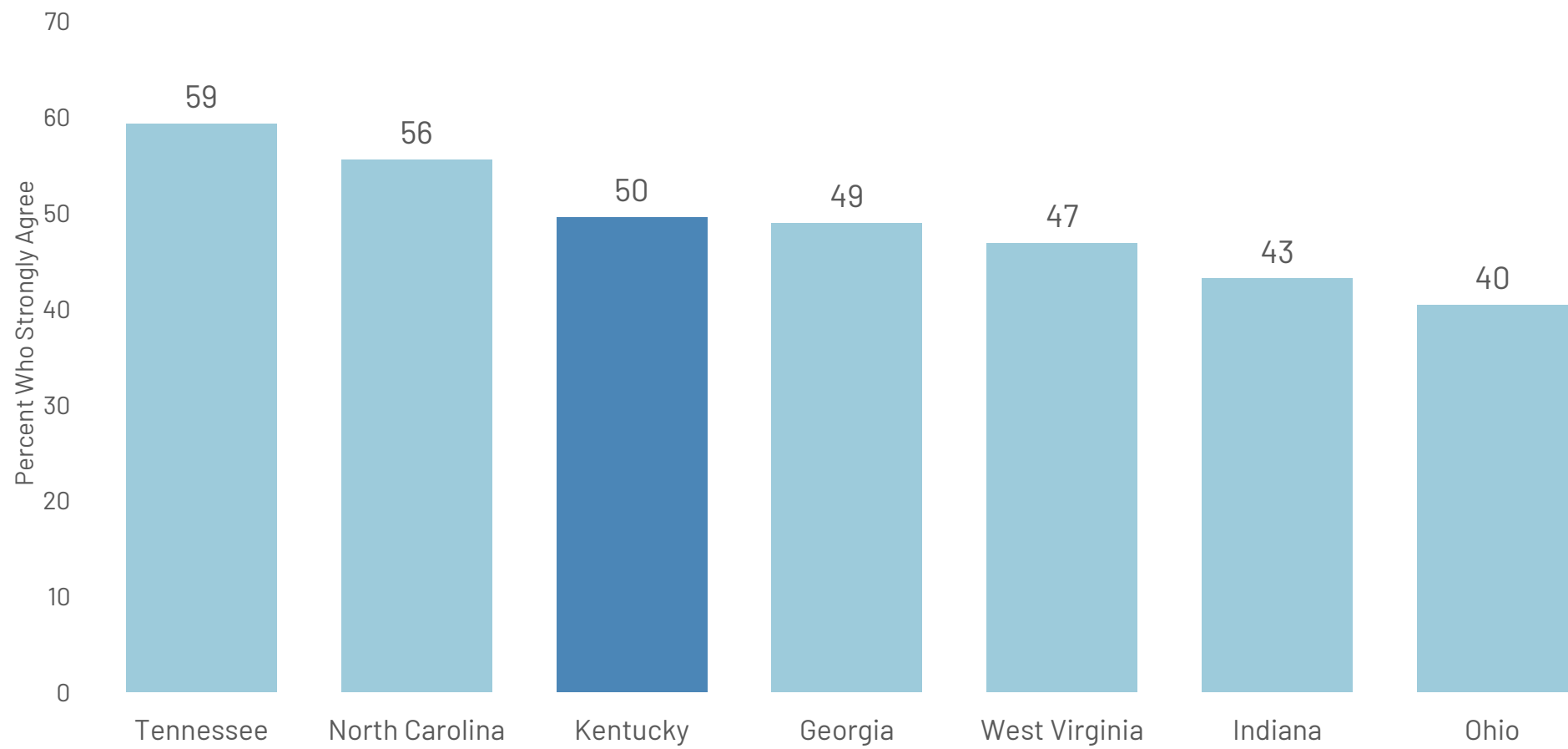
46

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

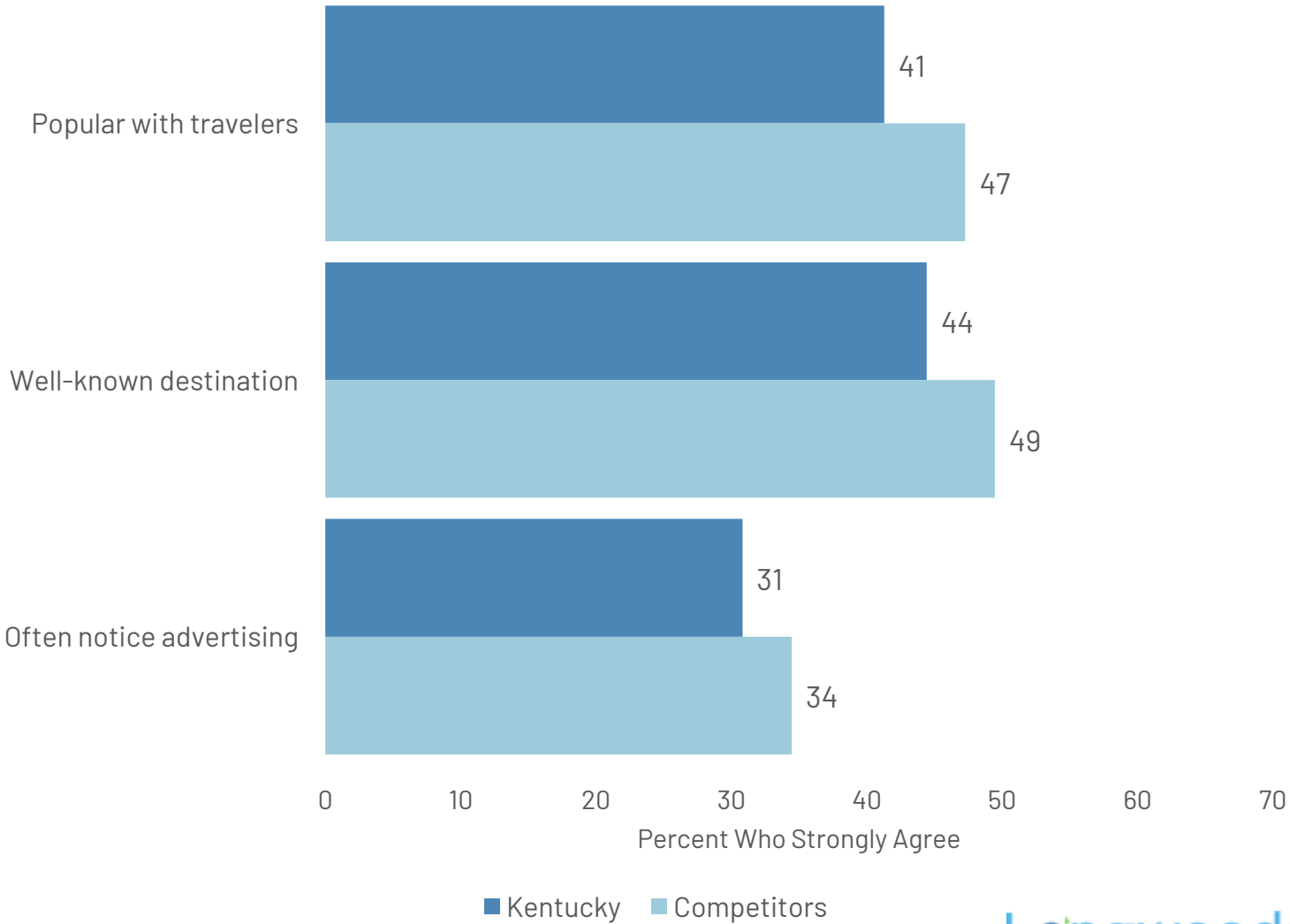
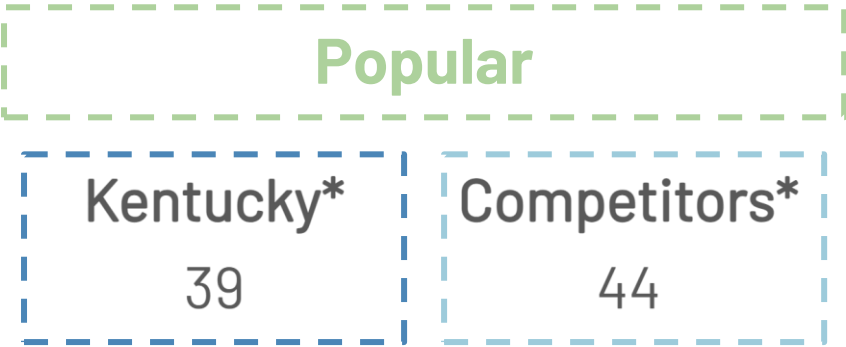
Kentucky Competitors

*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION - WORRY-FREE

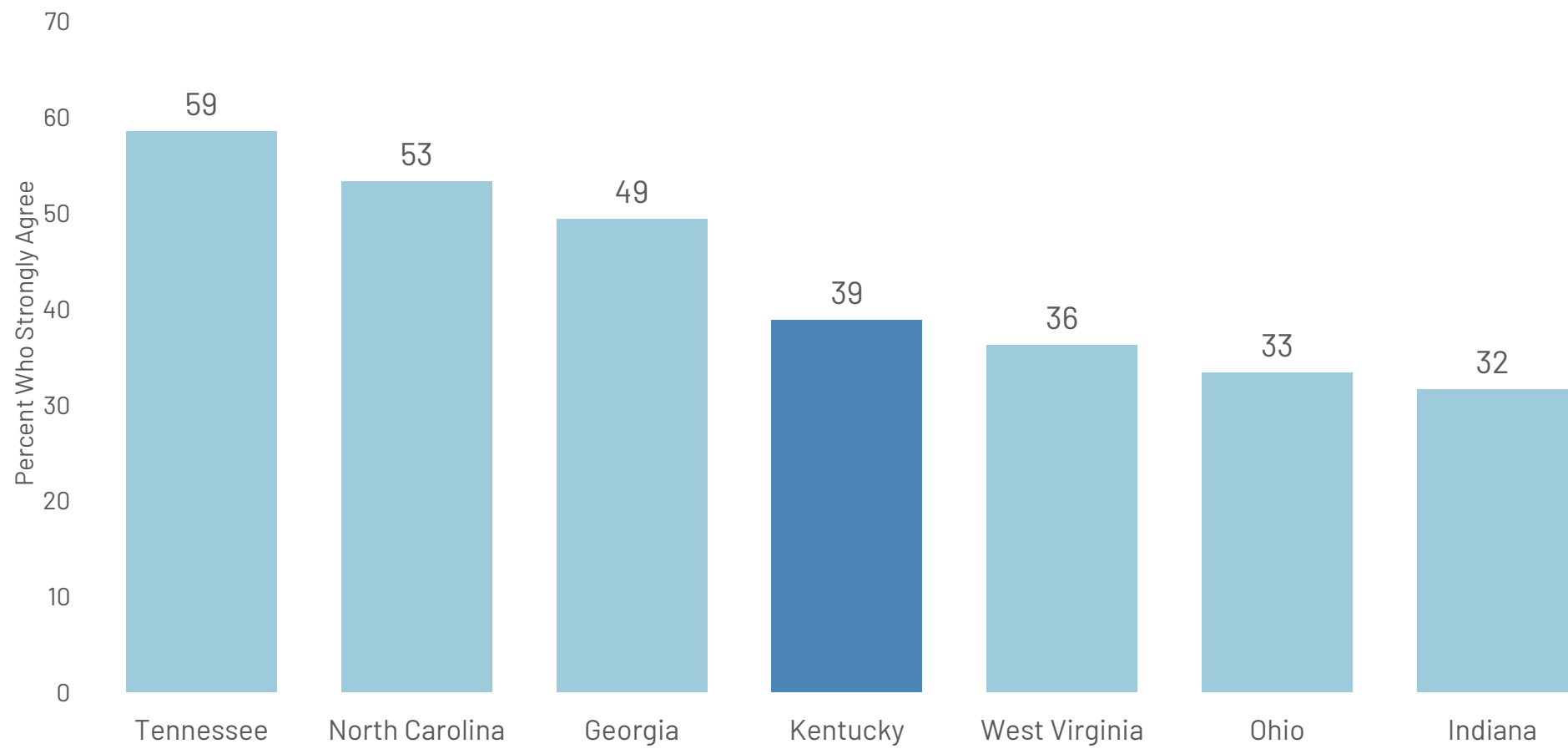


DESTINATION IMAGE VS. COMPETITION - POPULAR

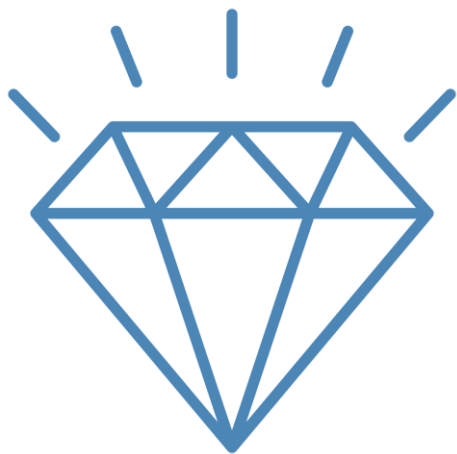


*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION – POPULAR

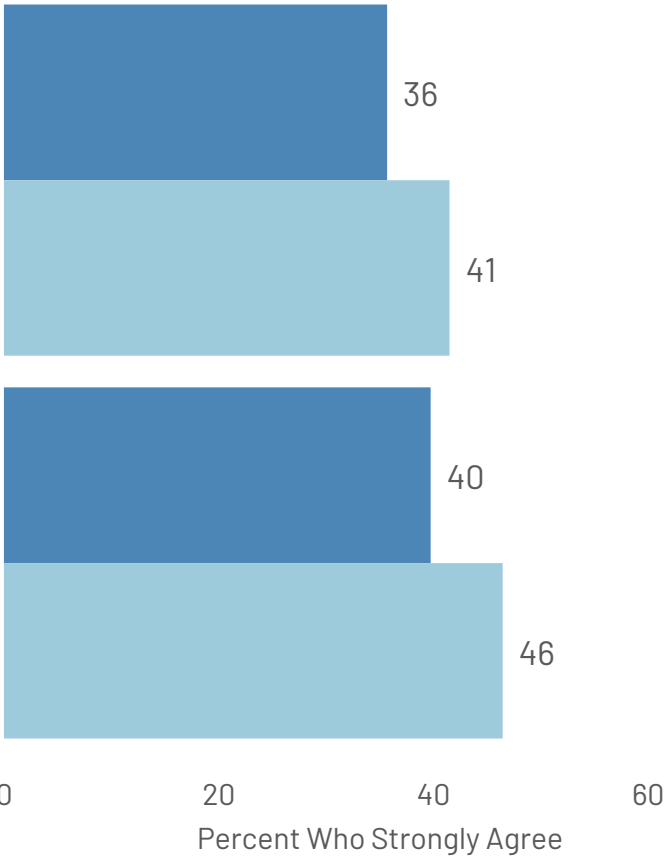


DESTINATION IMAGE VS. COMPETITION - LUXURIOUS

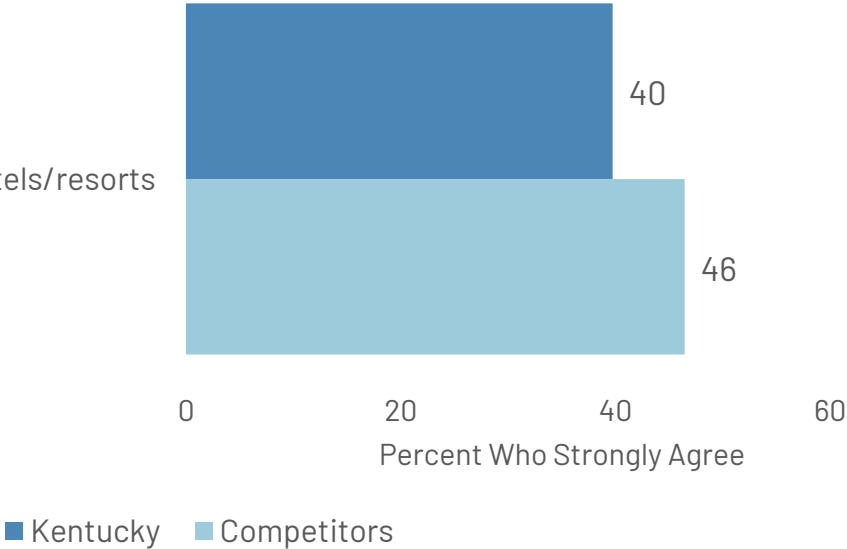


Luxurious	
Kentucky*	Competitors*
38	44

Great luxury product offerings (e.g., spas, fine dining)

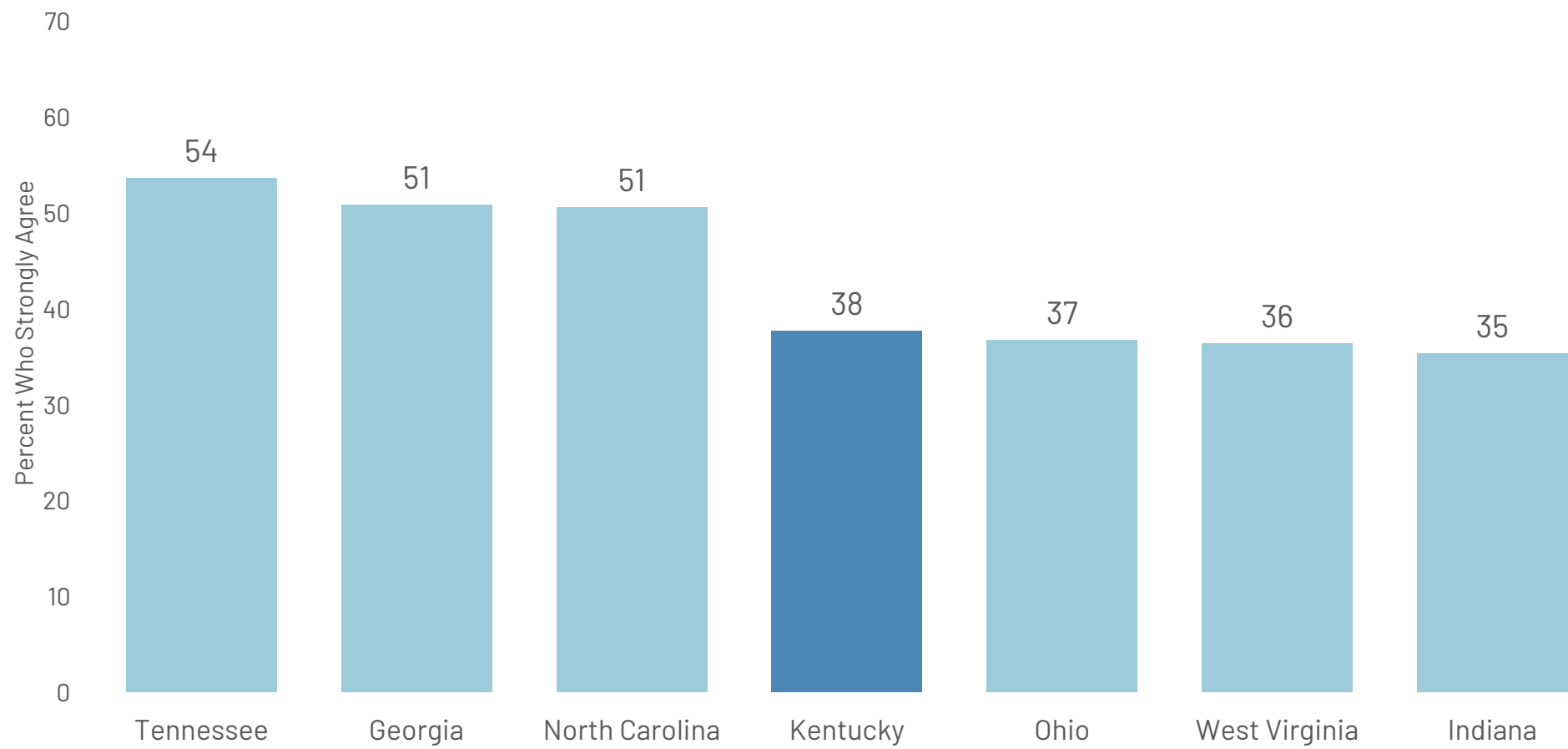


Offers a variety of luxury hotels/resorts



*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION - LUXURIOUS



DESTINATION IMAGE VS. COMPETITION - ENTERTAINMENT



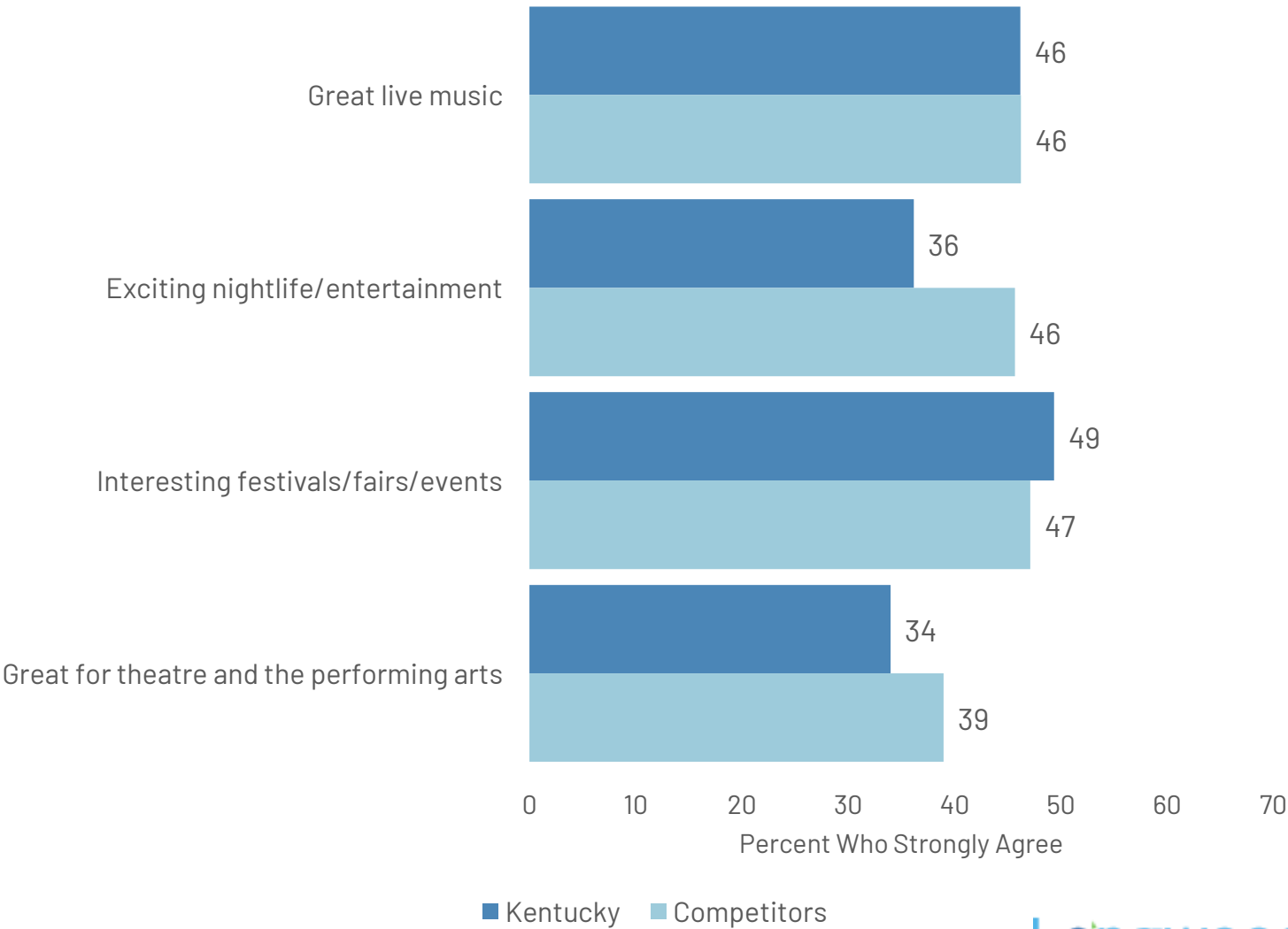
Entertainment

Kentucky*

41

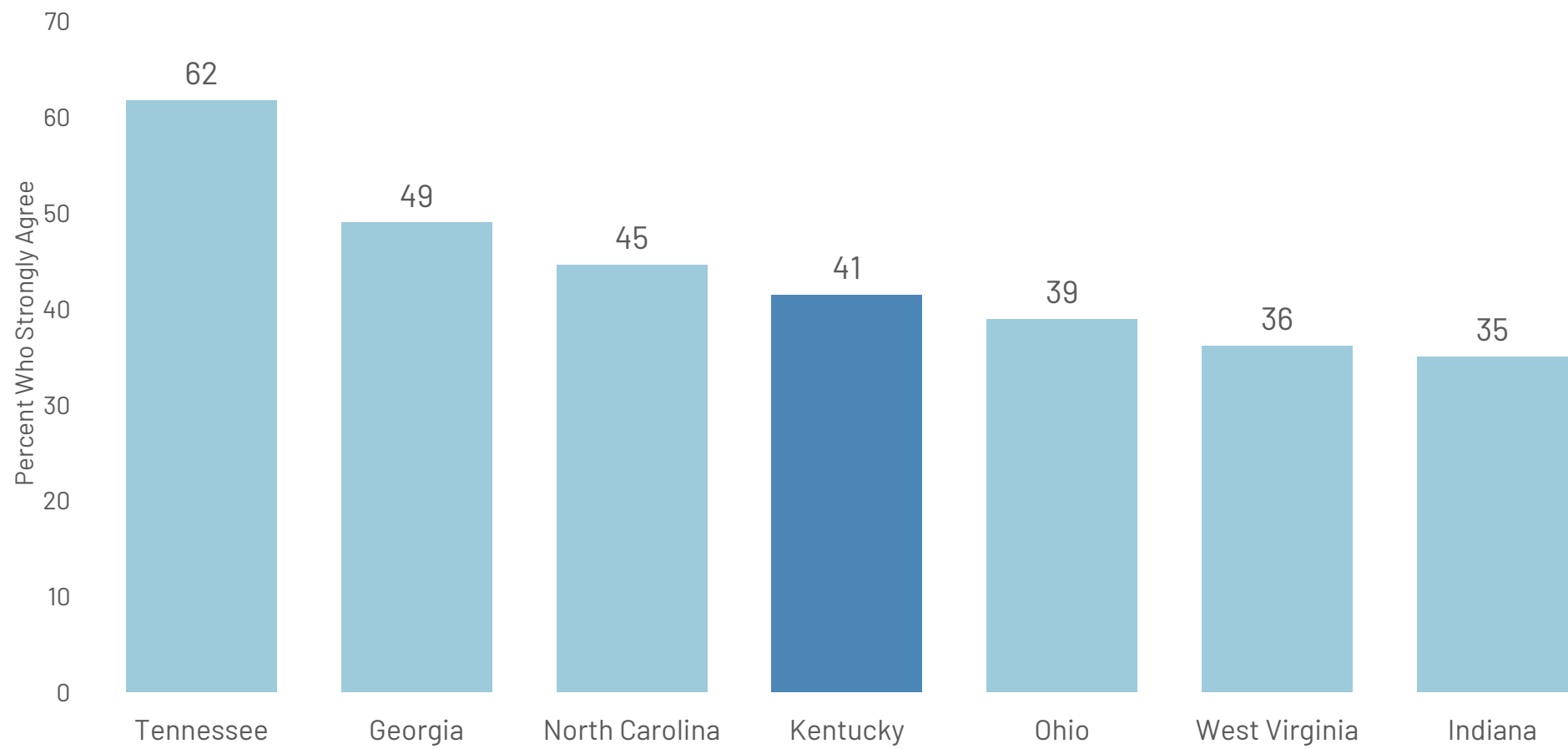
Competitors*

45



*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION - ENTERTAINMENT



DESTINATION IMAGE VS. COMPETITION – SPORTS AND RECREATION



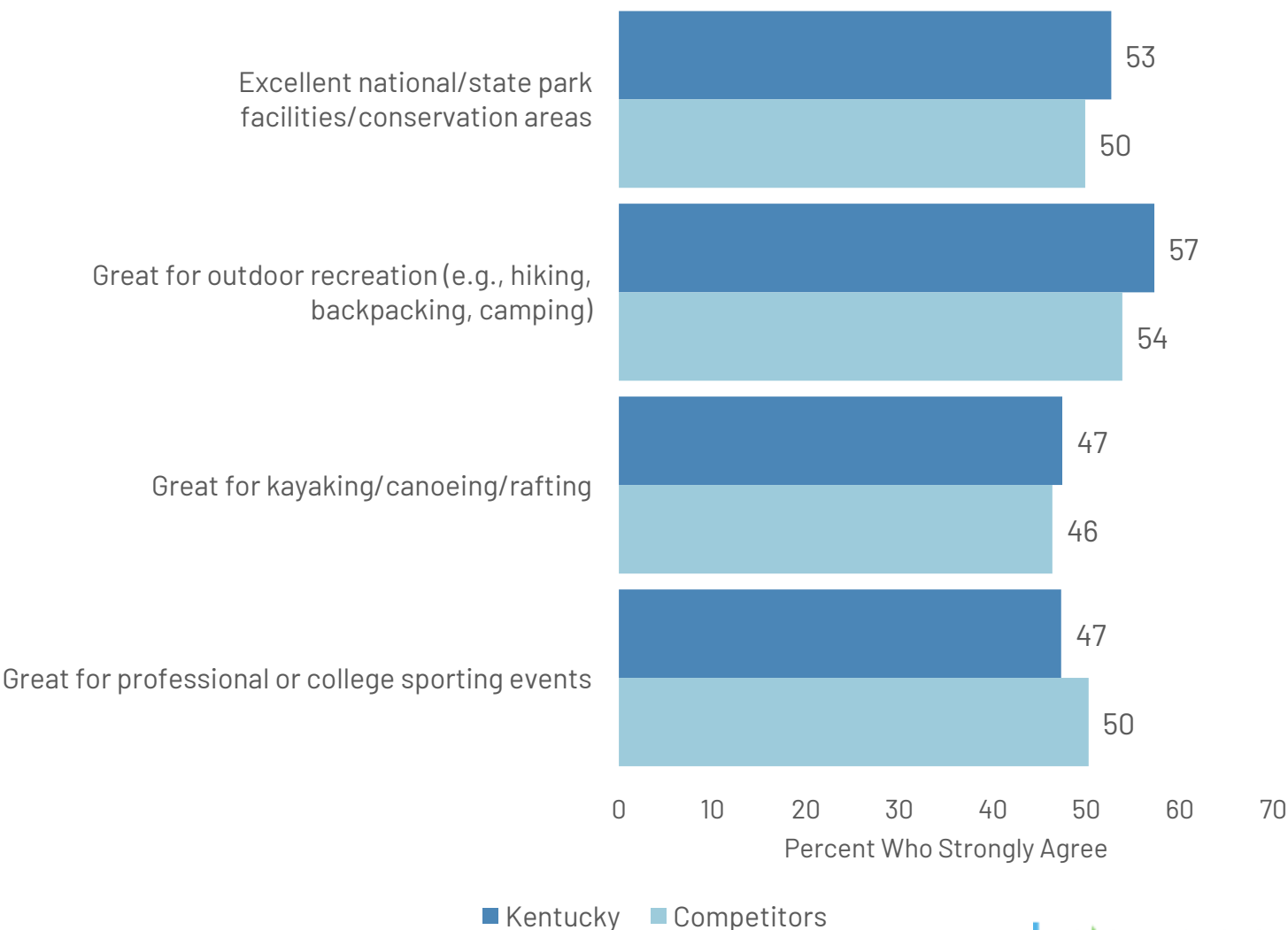
Sports and Recreation

Kentucky*

51

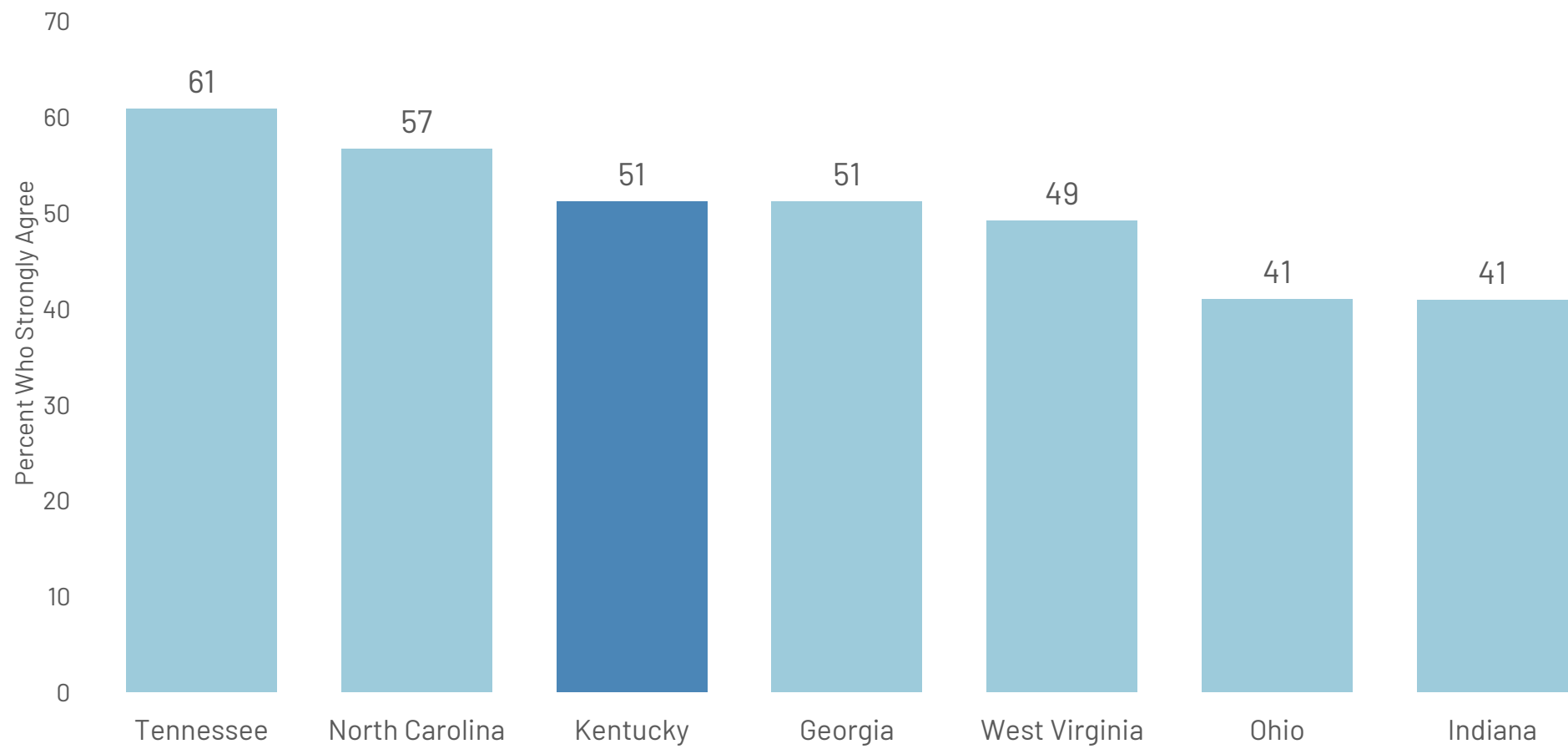
Competitors*

50



*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION – SPORTS AND RECREATION



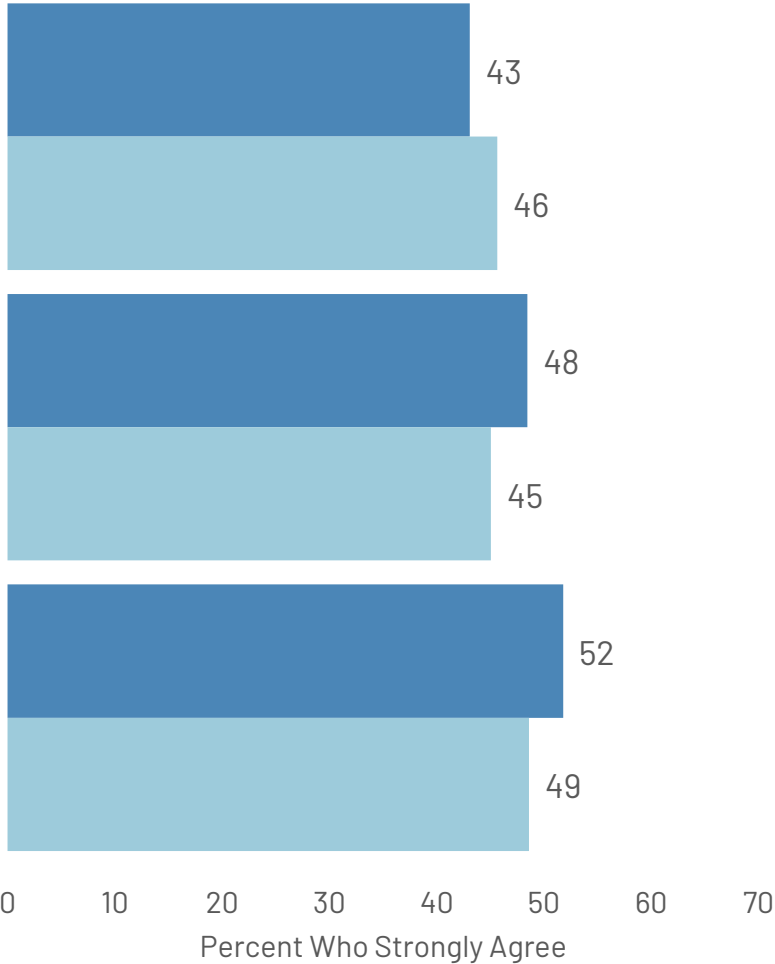
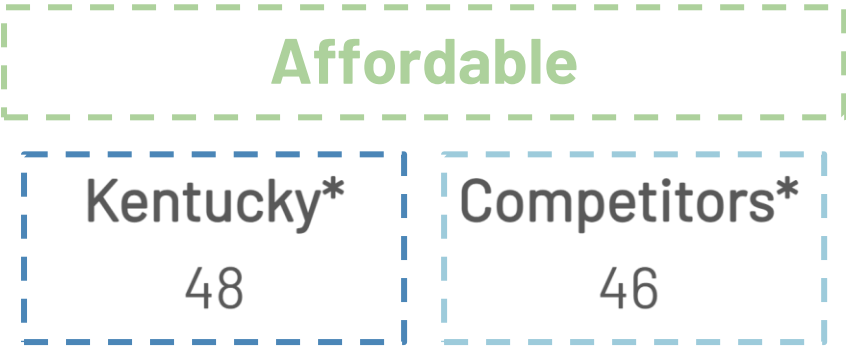
DESTINATION IMAGE VS. COMPETITION - AFFORDABLE



Good vacation packages

Affordable accommodations and dining options

Not too far away or expensive to consider for a vacation

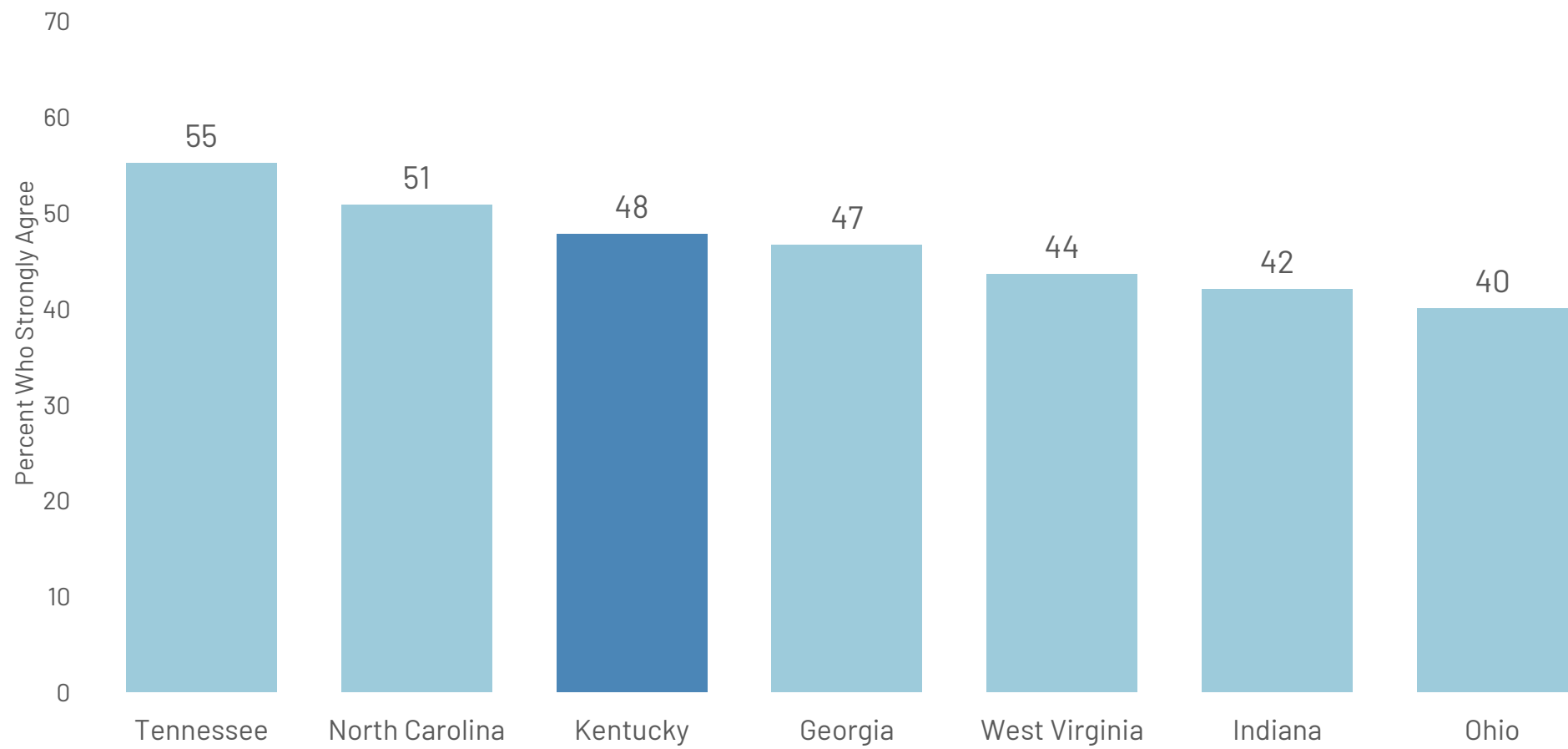


Hot Button

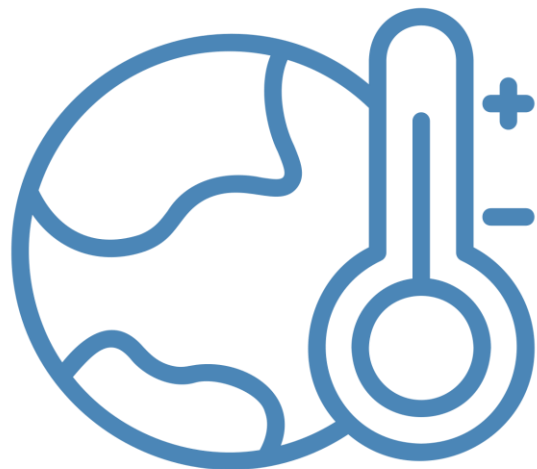
*Percent who strongly agree
Base: Total Markets

Kentucky Competitors

DESTINATION IMAGE VS. COMPETITION – AFFORDABLE



DESTINATION IMAGE VS. COMPETITION - CLIMATE



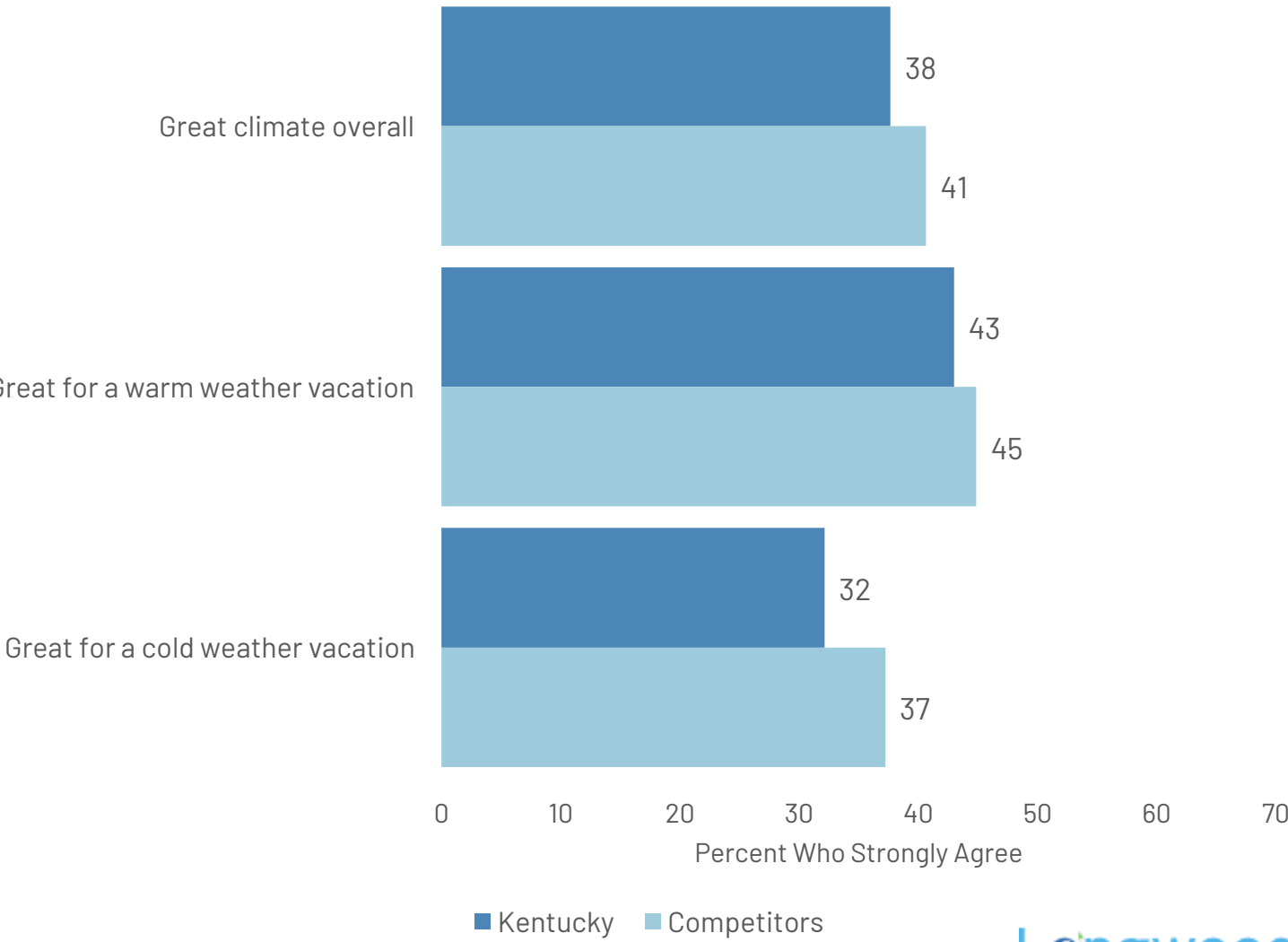
Climate

Kentucky*

38

Competitors*

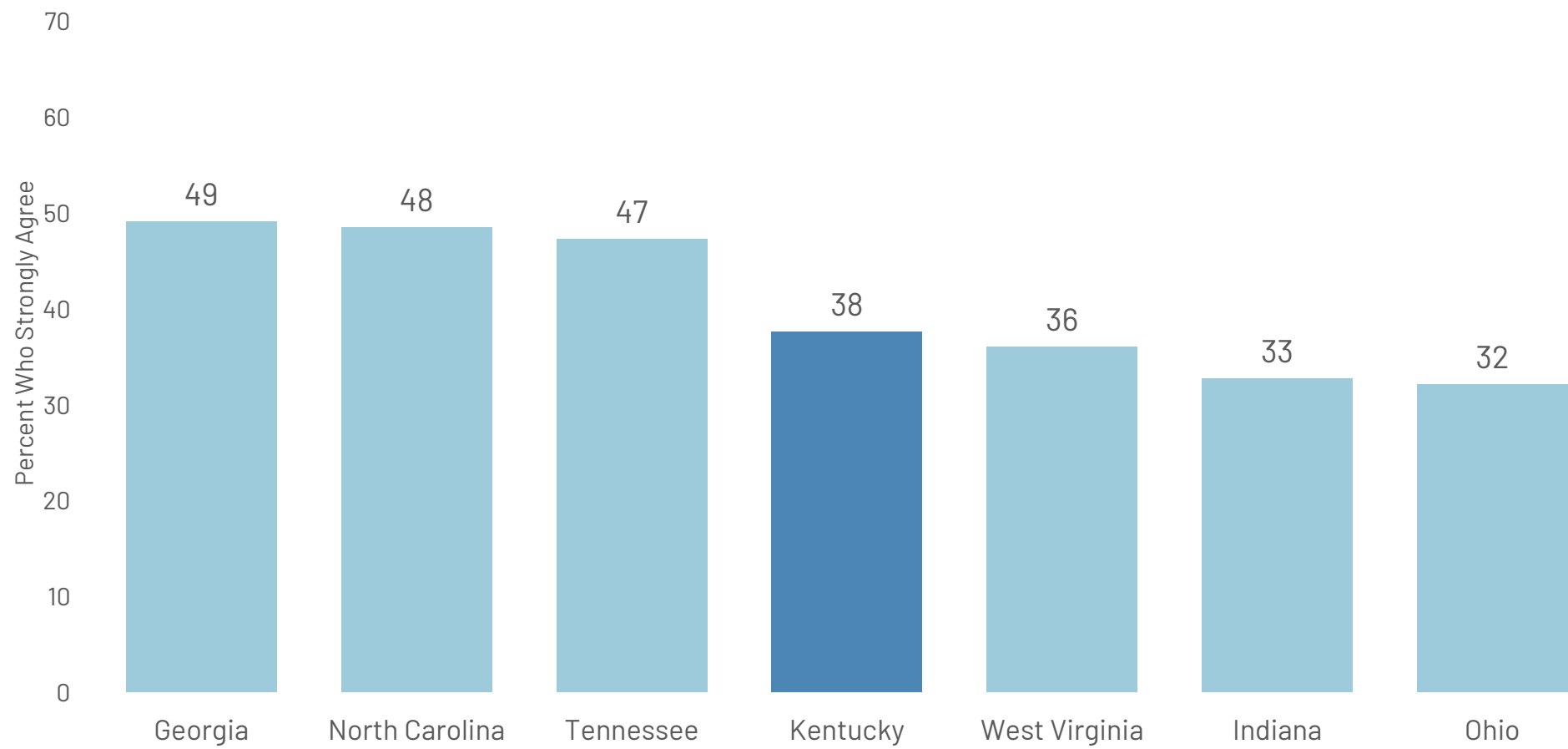
41



Hot Button

*Percent who strongly agree
Base: Total Markets

DESTINATION IMAGE VS. COMPETITION – CLIMATE



DESTINATION IMAGE STRENGTHS VS. COMPETITION

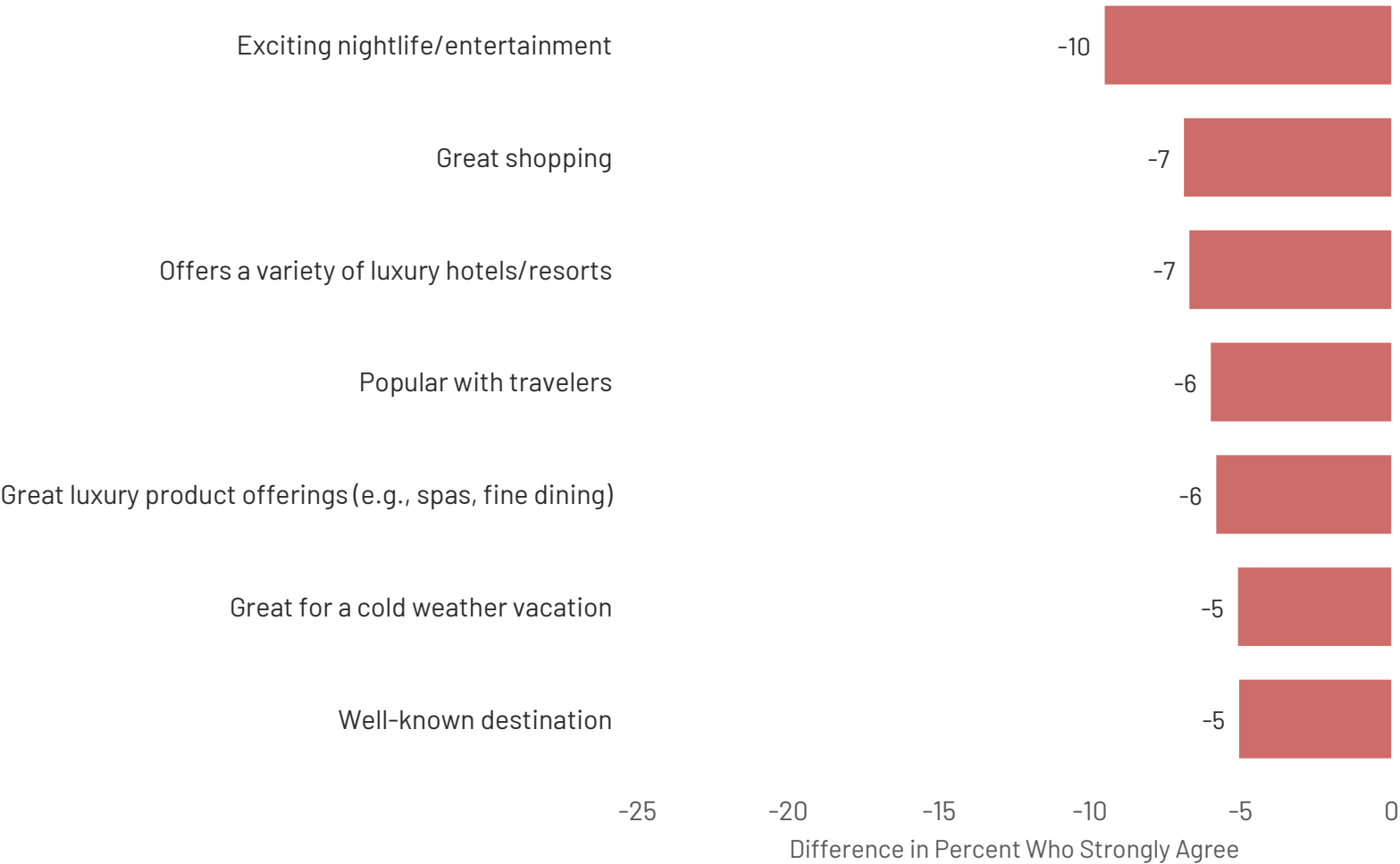
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky vs. The Total Competitive Set.**

Unique distillery tours



22

DESTINATION IMAGE WEAKNESSES VS. COMPETITION



Although Kentucky underperforms for the seven perceptions & attributes in the adjacent graph versus its combined competitive set, Kentucky does not underperform significantly for any Hot Buttons in its Total advertising 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.

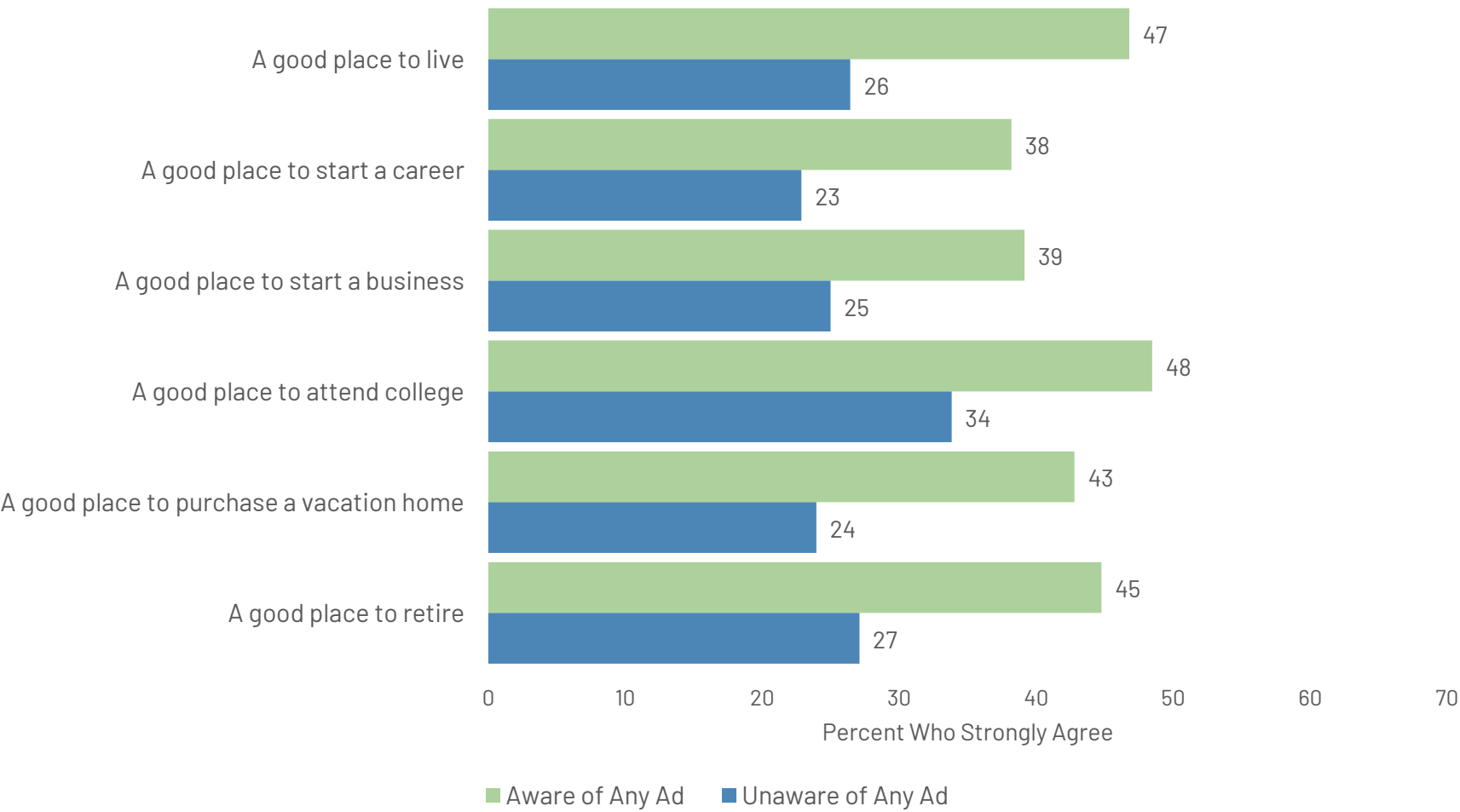
Applying the psychological concept of the **"halo effect"** to tourism promotion advertising, Longwoods set out to determine if gains in image for Kentucky from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that **economic objectives could also be achieved**, 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 Total 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.

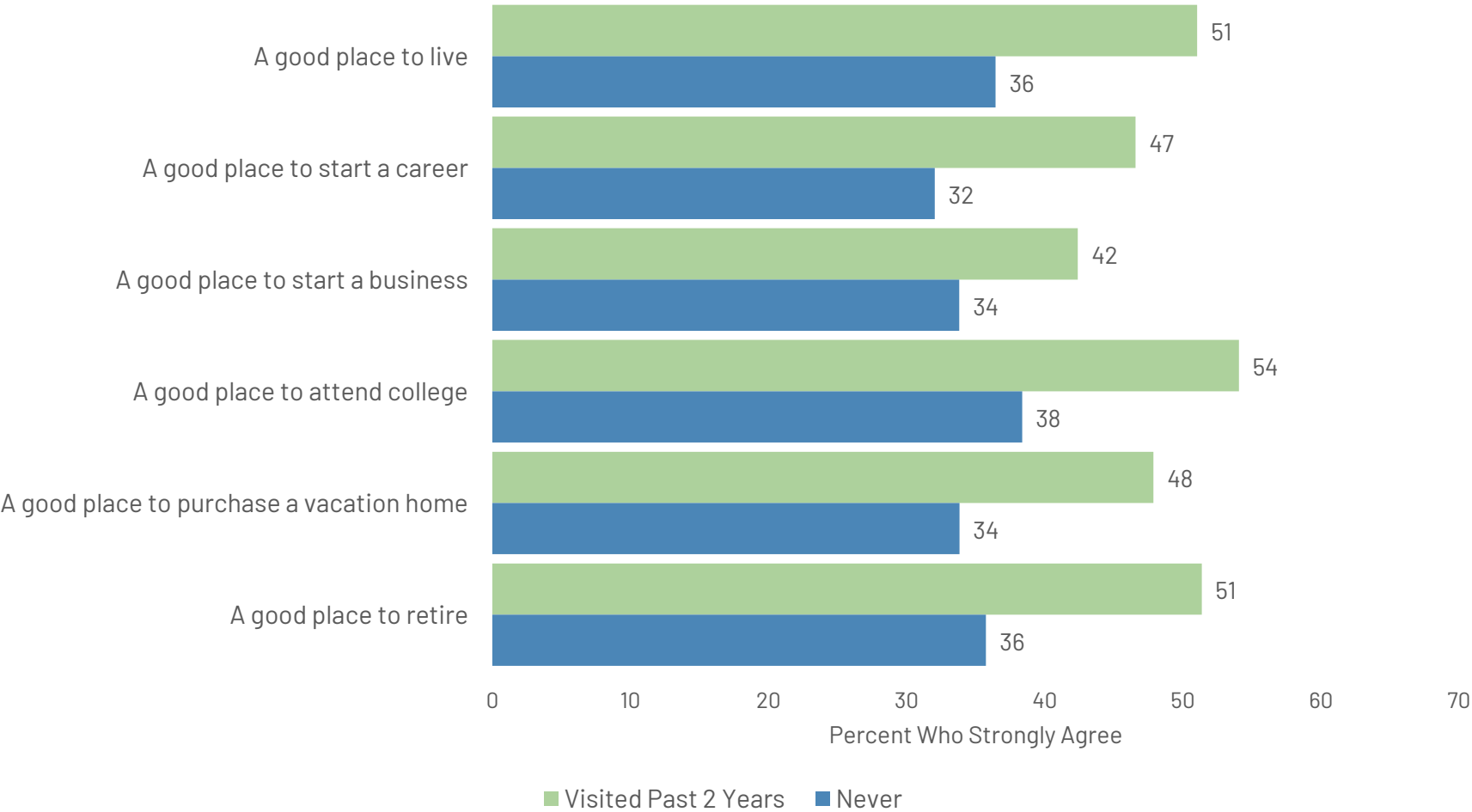
Those who saw the advertising rated Kentucky higher on all the economic development indicators.



IMPACT OF VISITATION ON ECONOMIC DEVELOPMENT

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

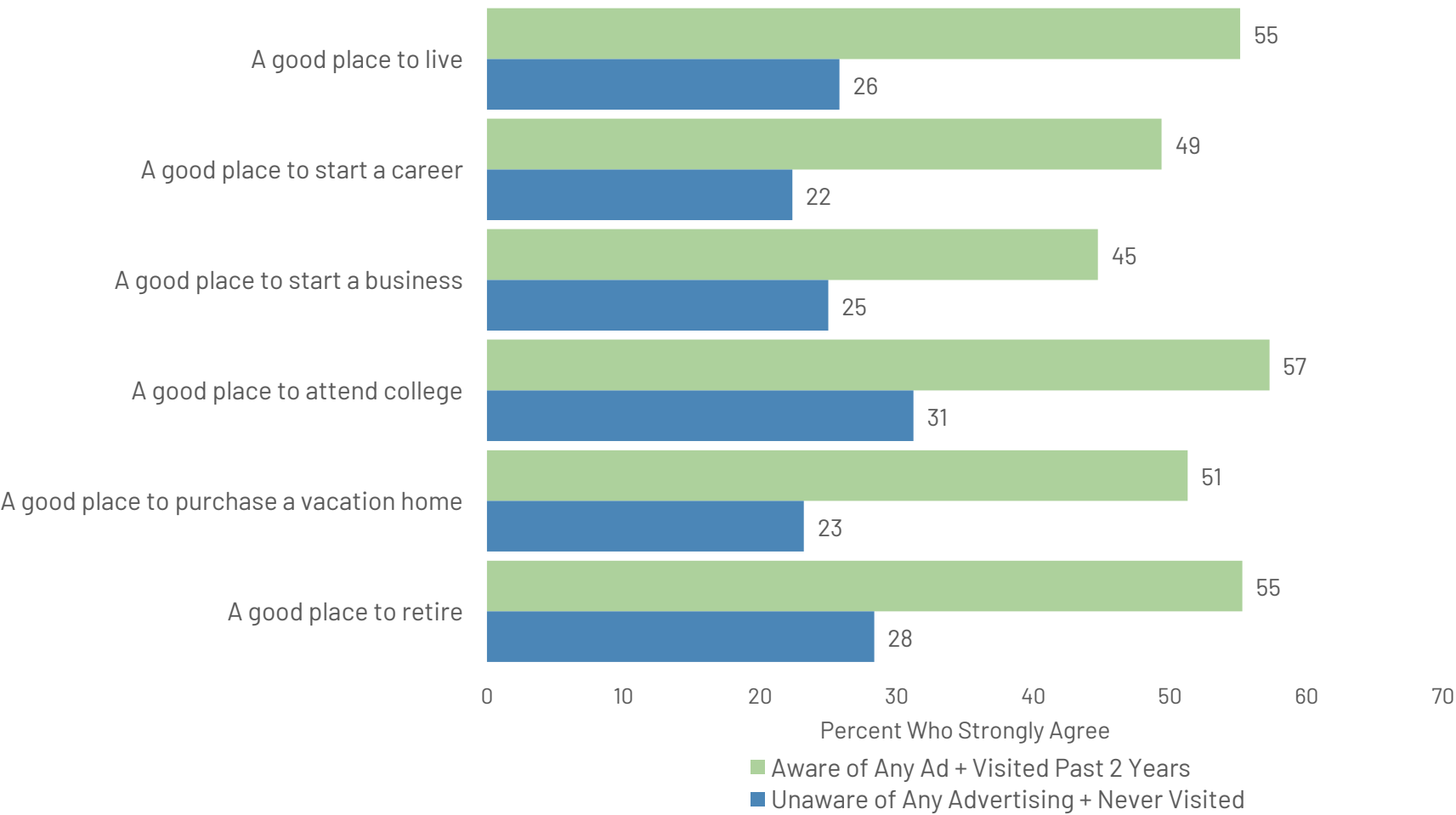
Total advertising market travelers who visited Kentucky during the past two years also consistently rated Kentucky higher than those who have never visited.



IMPACT OF AWARENESS + VISITATION ON ECONOMIC DEVELOPMENT

In the final Halo analysis, Longwoods compared the strongly agree results of Total 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 Total 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

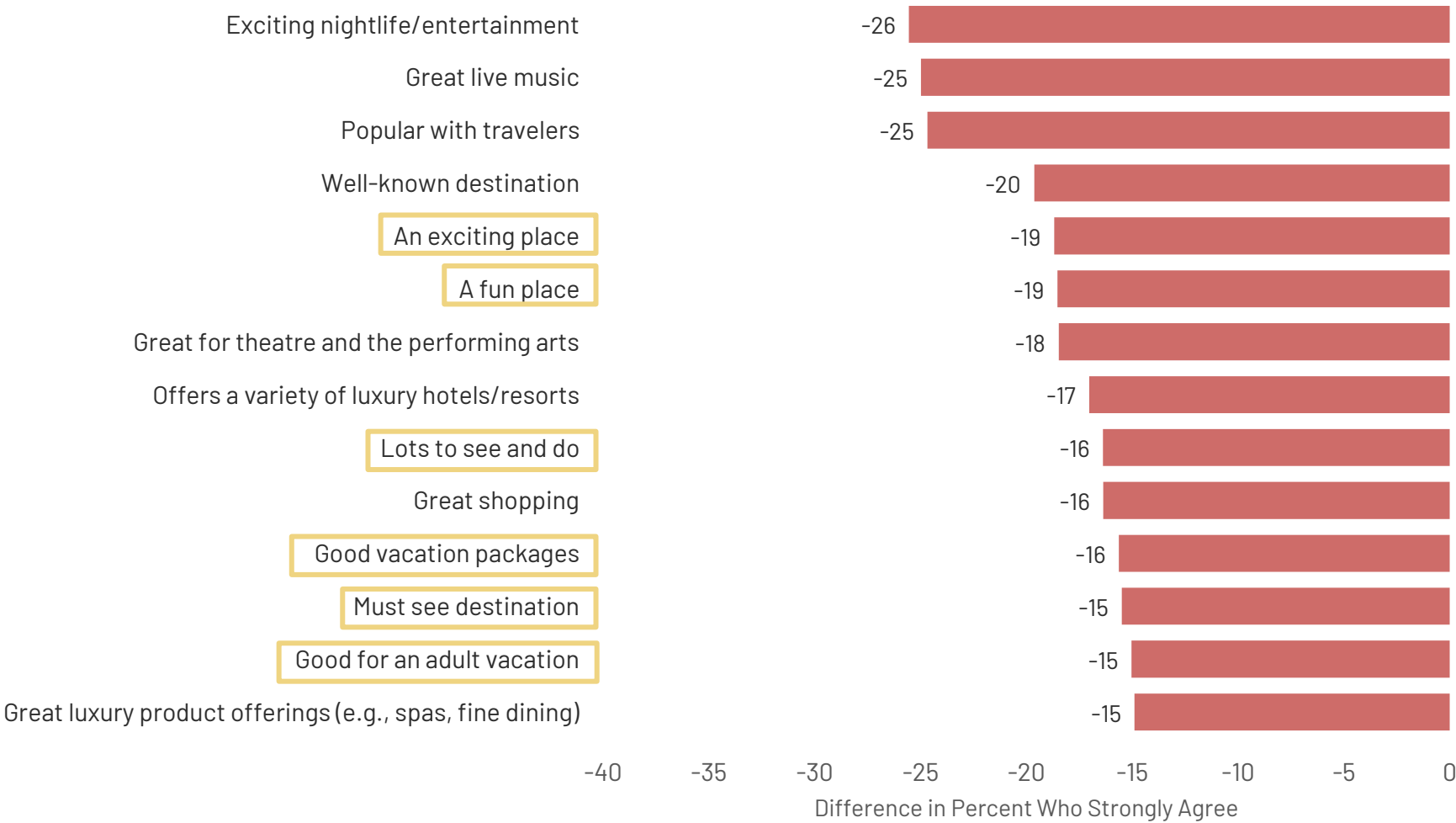




KENTUCKY VS. TENNESSEE:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
TENNESSEE

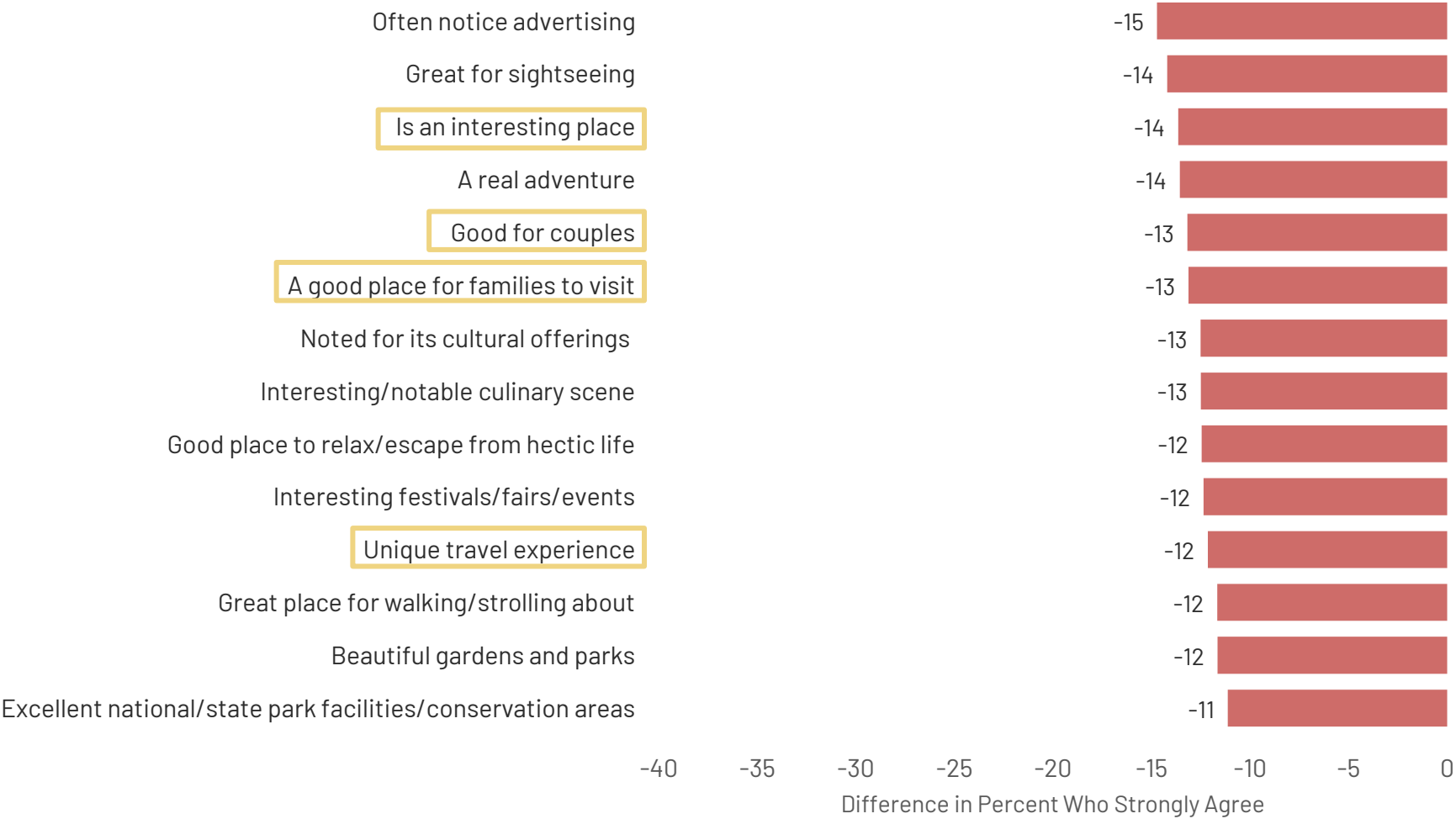
DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



Hot Button

Base: Total Markets

DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



Hot Button

Base: Total Markets

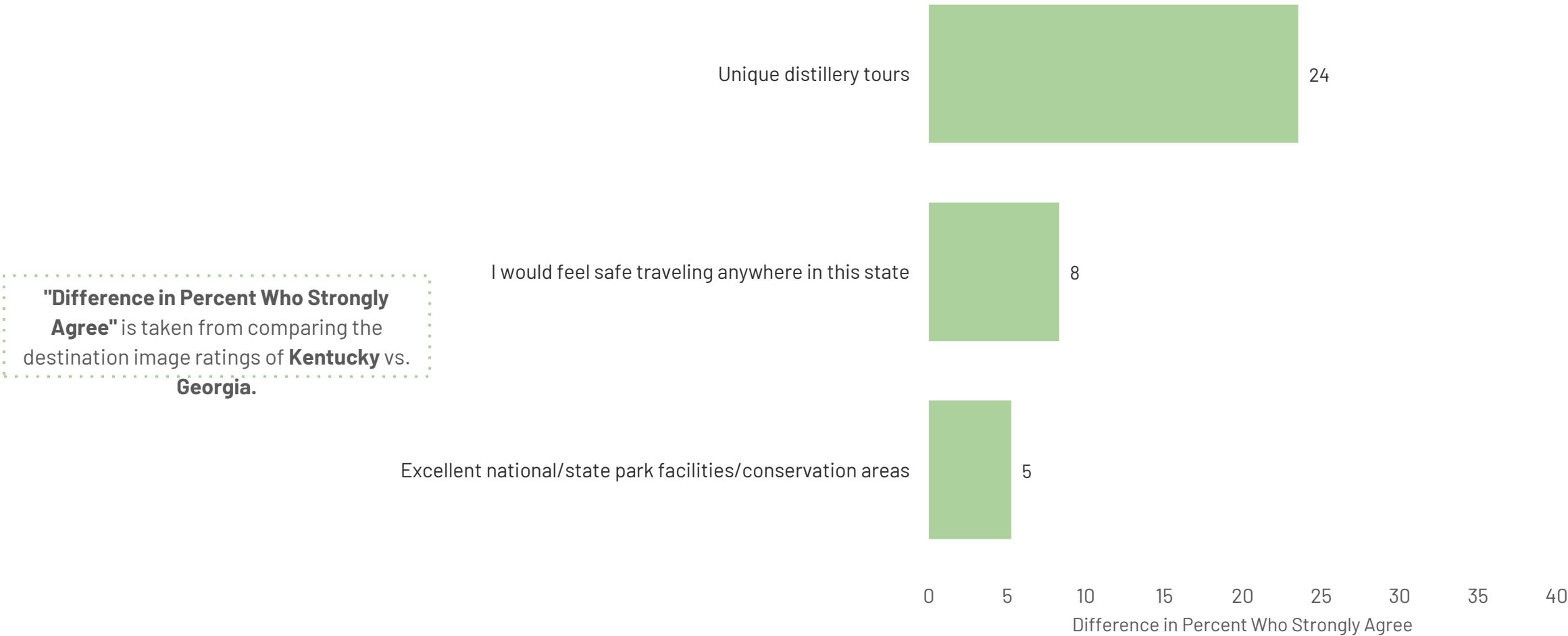
DESTINATION IMAGE WEAKNESSES VS. TENNESSEE



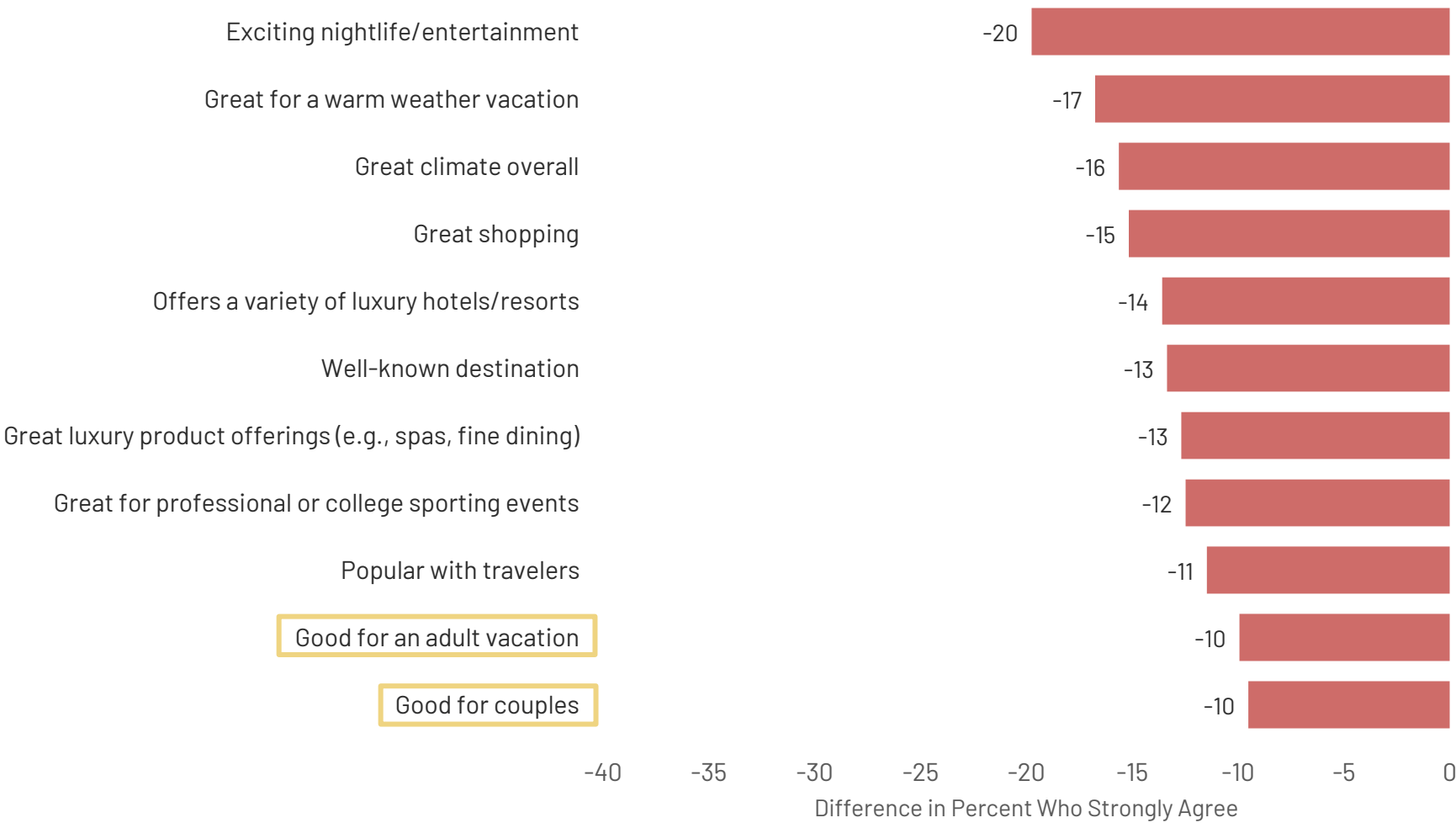


KENTUCKY VS. GEORGIA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. GEORGIA



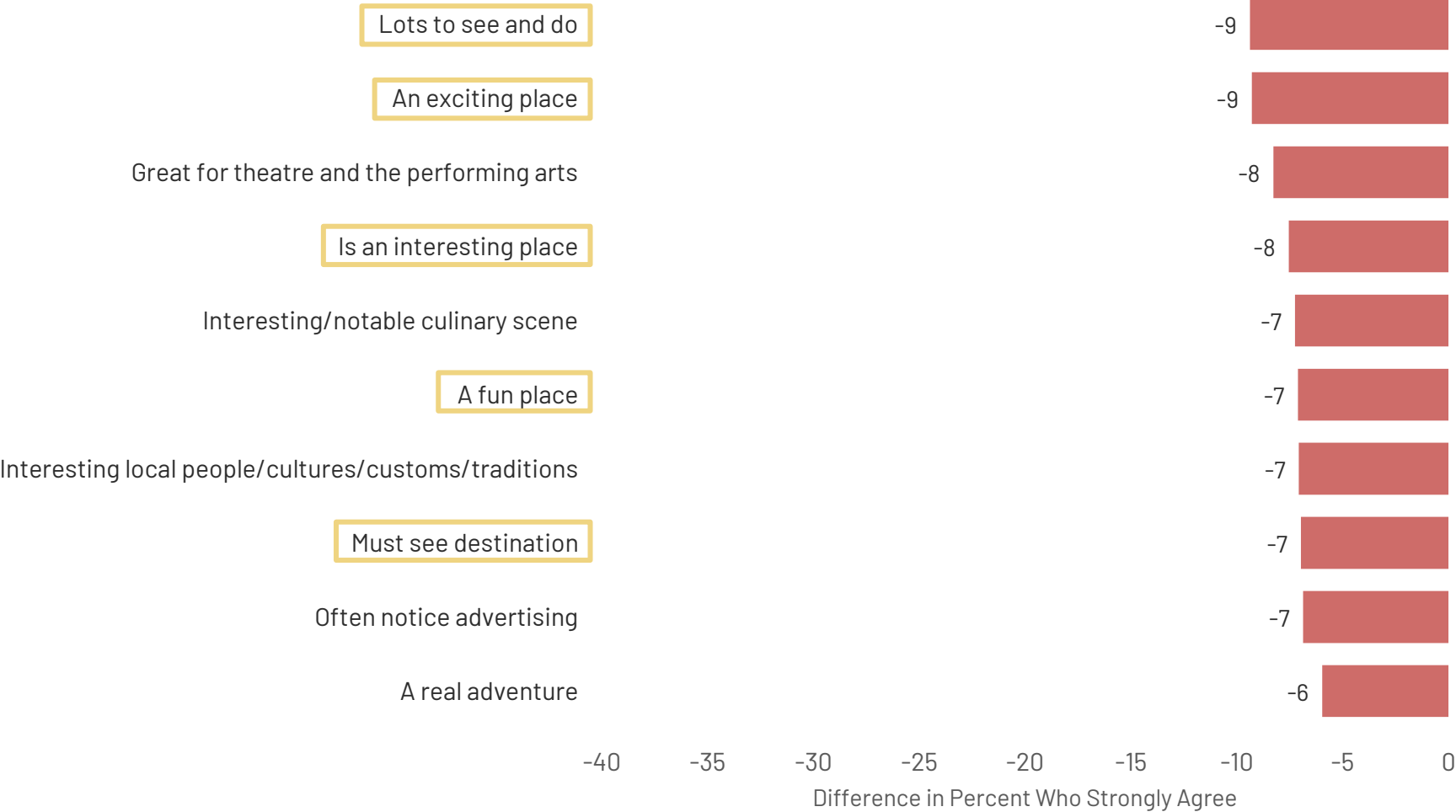
DESTINATION IMAGE WEAKNESSES VS. GEORGIA



Hot Button

Base: Total Markets

DESTINATION IMAGE WEAKNESSES VS. GEORGIA



Hot Button

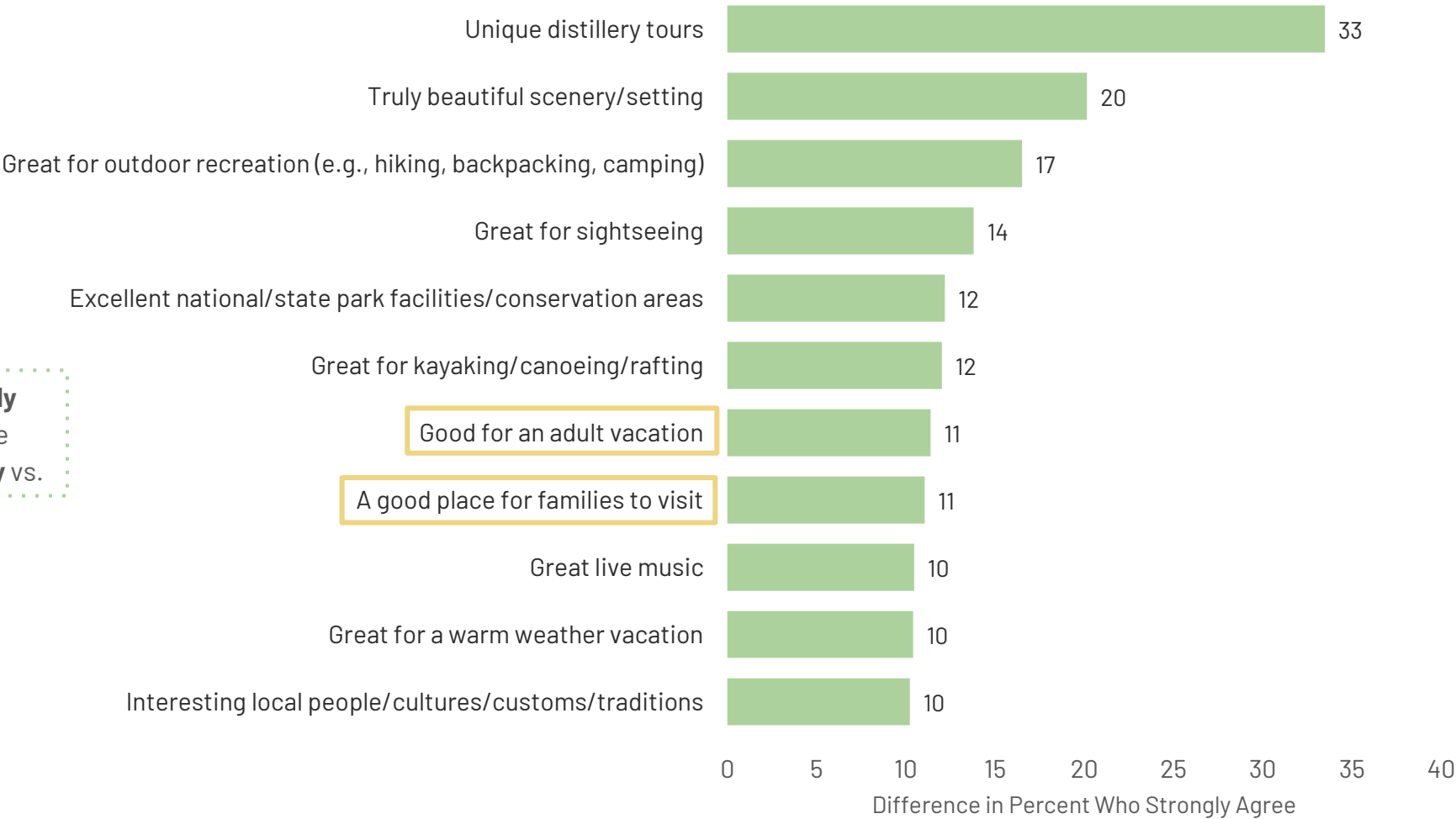
Base: Total Markets



KENTUCKY VS. INDIANA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. INDIANA

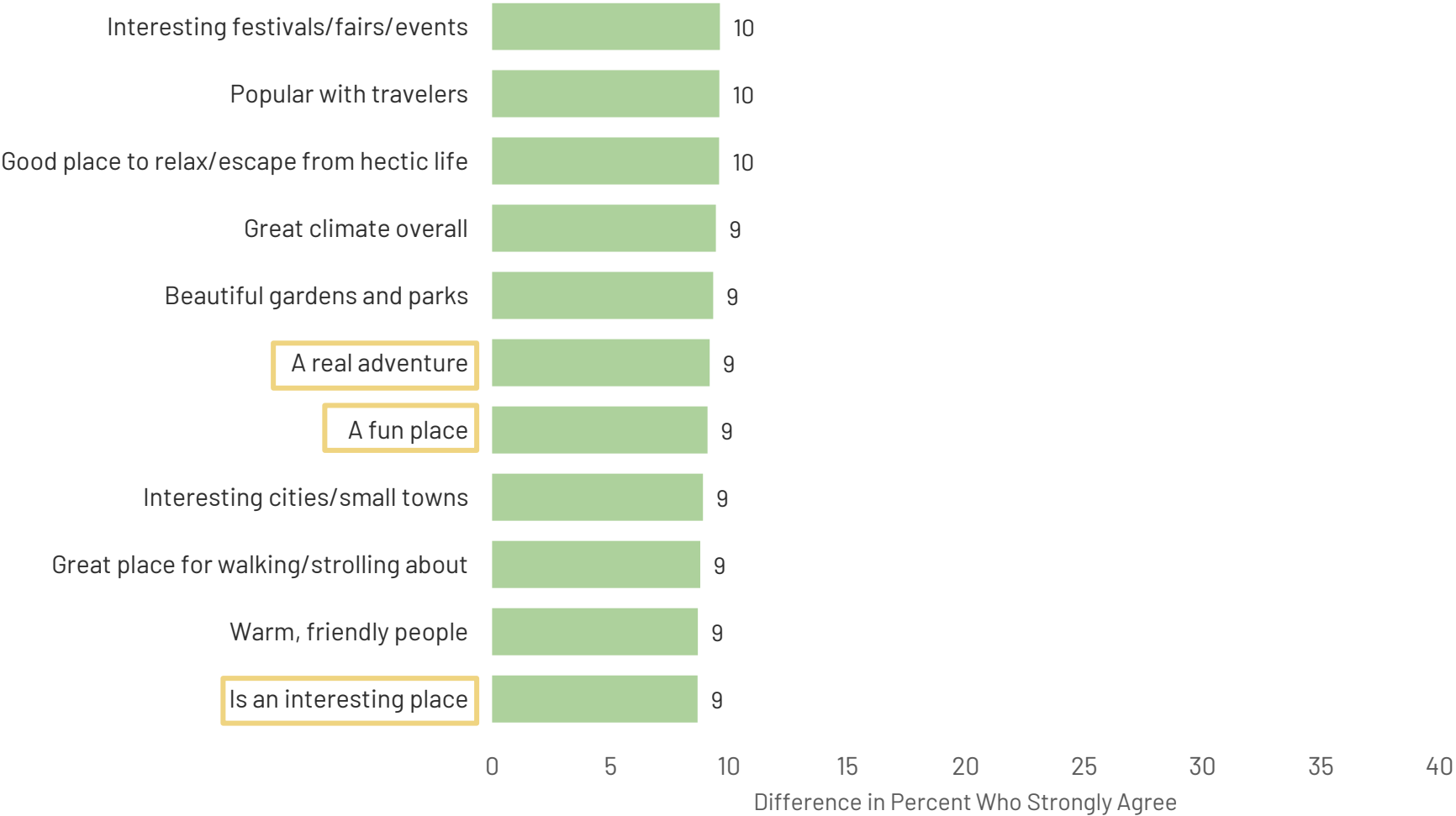
"Difference in Percent Who Strongly Agree" is taken from comparing the destination image ratings of **Kentucky** vs. **Indiana**.



Hot Button

Base: Total Markets

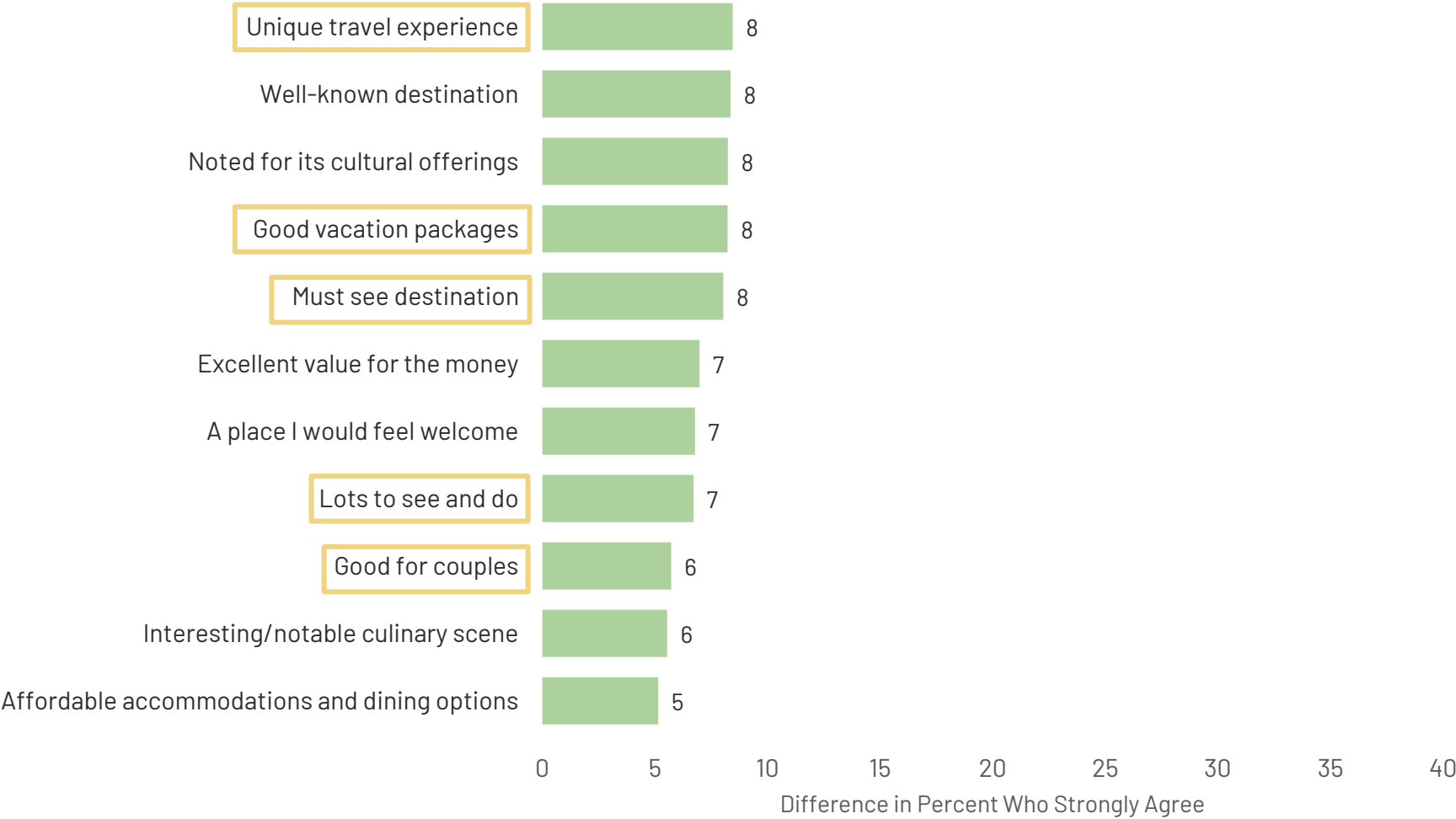
DESTINATION IMAGE STRENGTHS VS. INDIANA



Hot Button

Base: Total Markets

DESTINATION IMAGE STRENGTHS VS. INDIANA



Hot Button

Base: Total Markets

DESTINATION IMAGE WEAKNESSES VS. INDIANA

Great for a cold weather vacation

-5

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

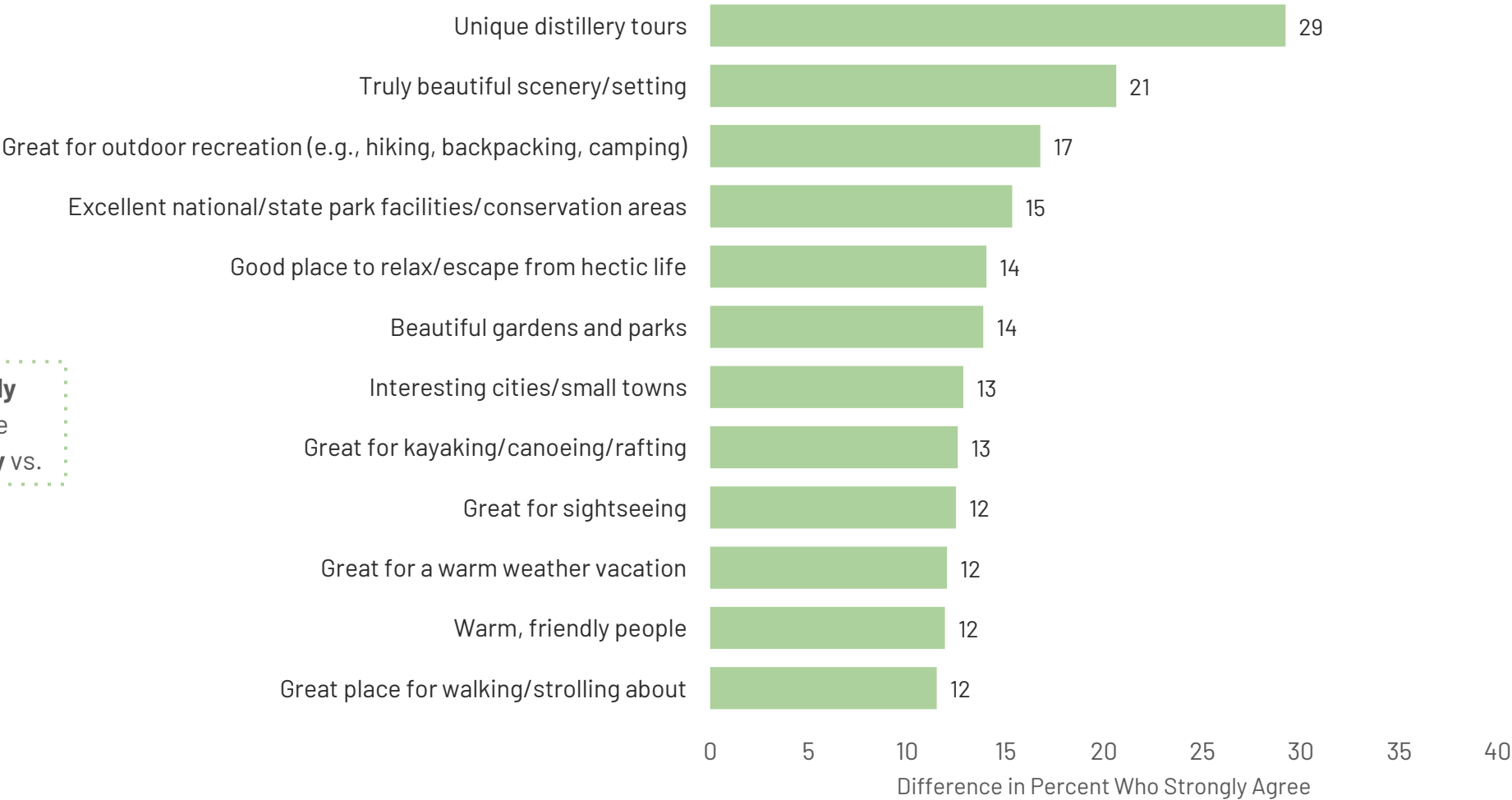
Difference in Percent Who Strongly Agree



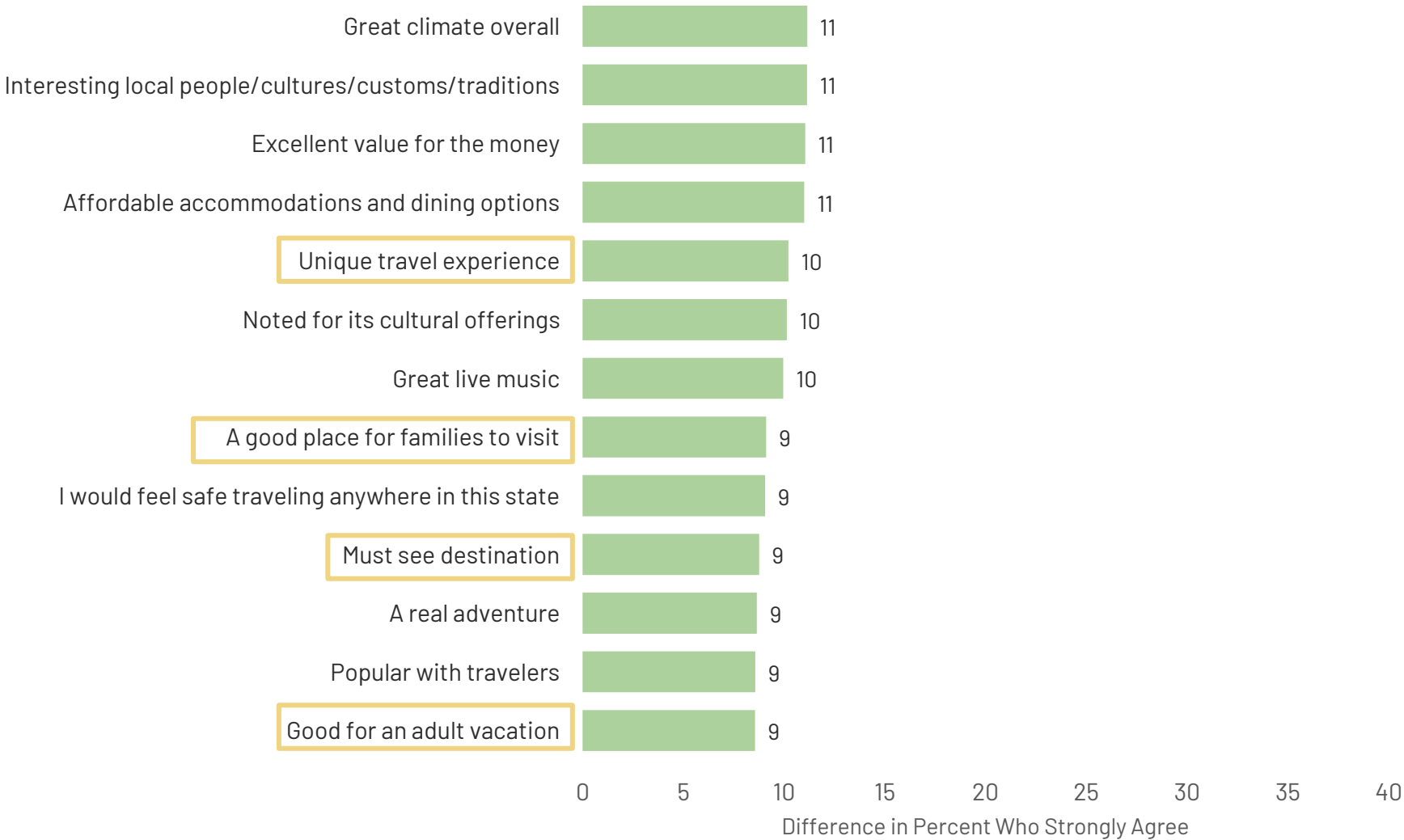
KENTUCKY VS. OHIO:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

DESTINATION IMAGE STRENGTHS VS. OHIO

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



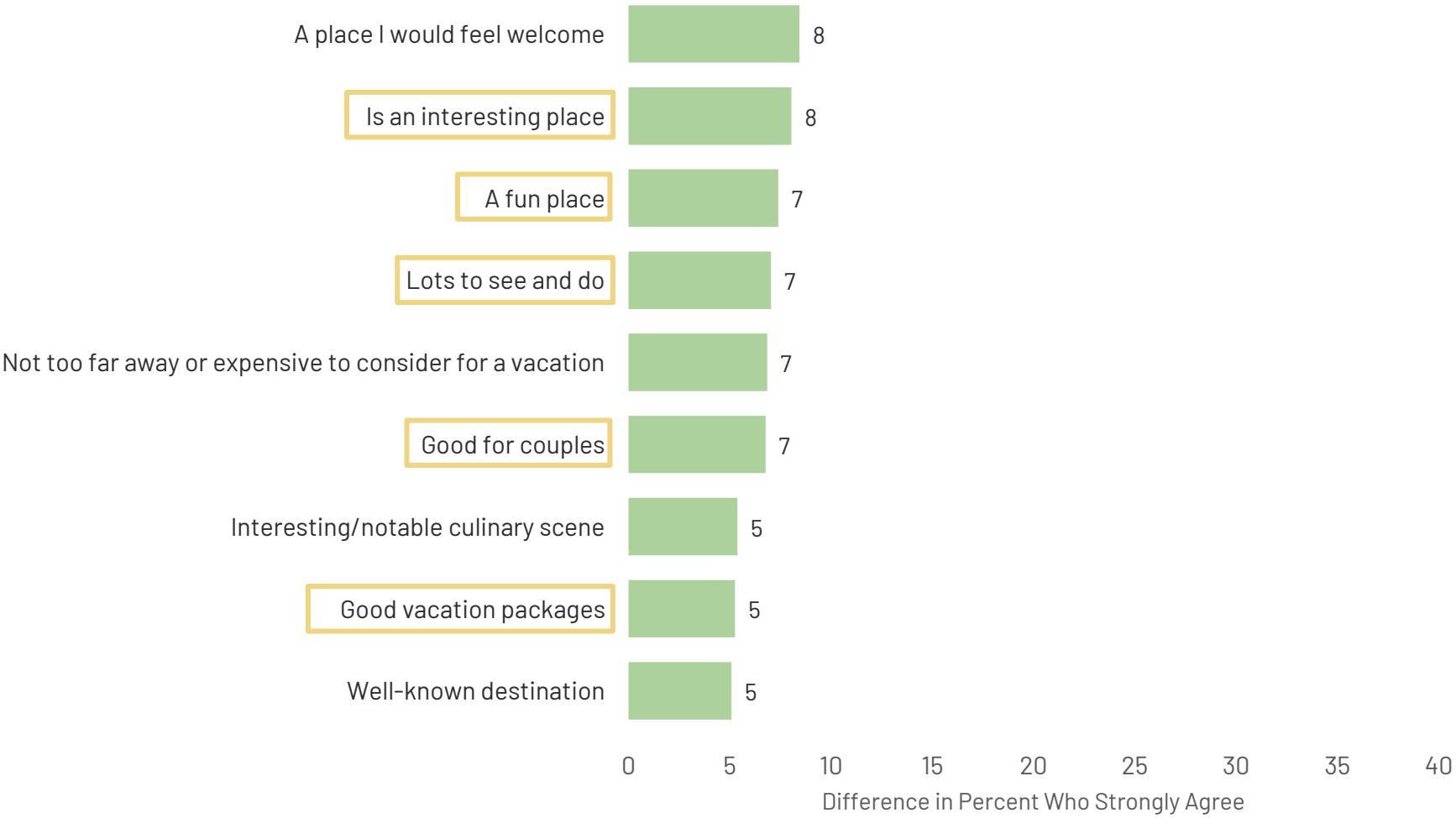
DESTINATION IMAGE STRENGTHS VS. OHIO



Hot Button

Base: Total Markets

DESTINATION IMAGE STRENGTHS VS. OHIO



Hot Button

Base: Total Markets

DESTINATION IMAGE WEAKNESSES VS. OHIO

Great for a cold weather vacation

-7

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

Difference in Percent Who Strongly Agree

Hot Button

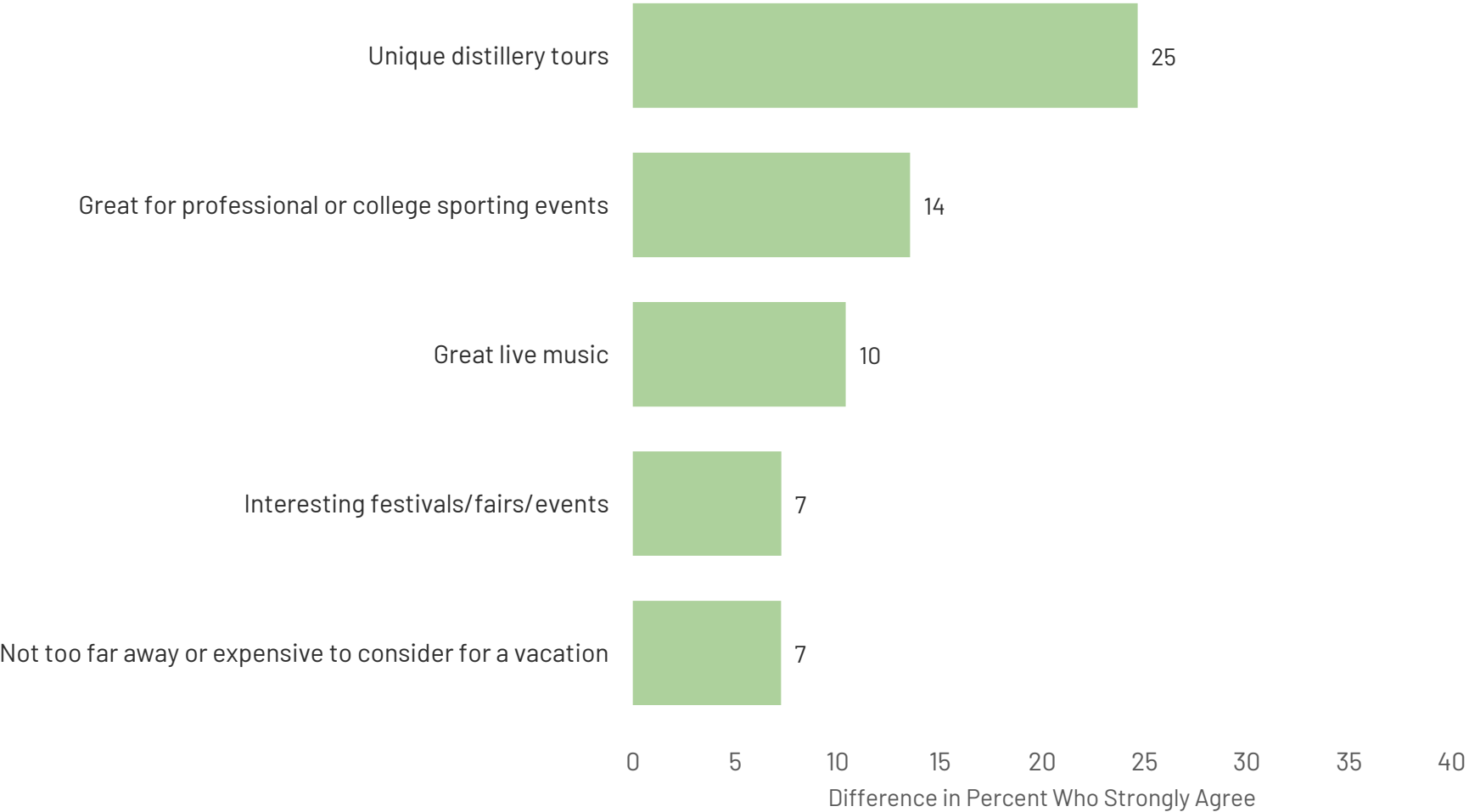
Base: Total Markets



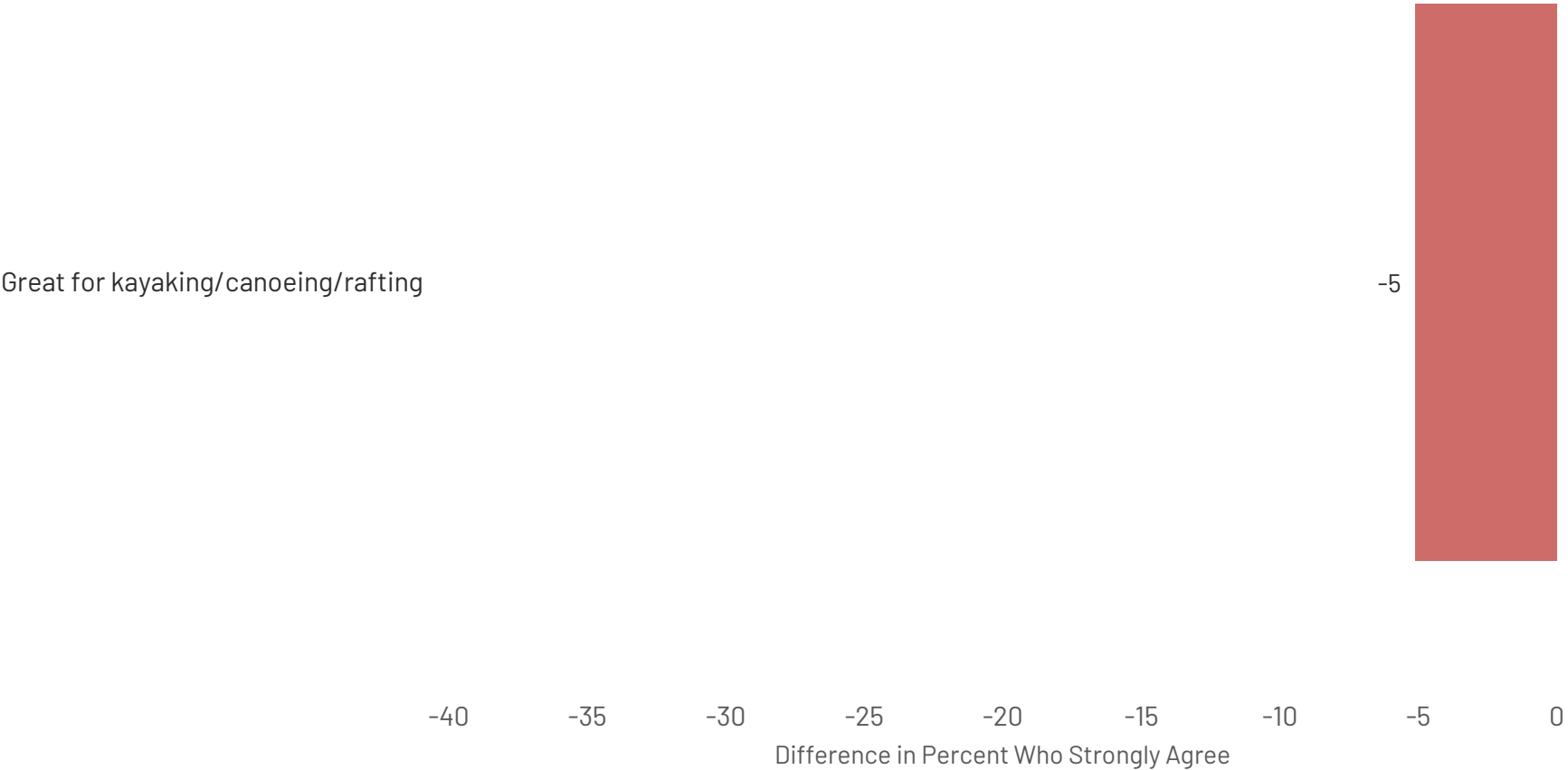
KENTUCKY VS. WEST VIRGINIA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

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**



DESTINATION IMAGE WEAKNESSES VS. WEST VIRGINIA



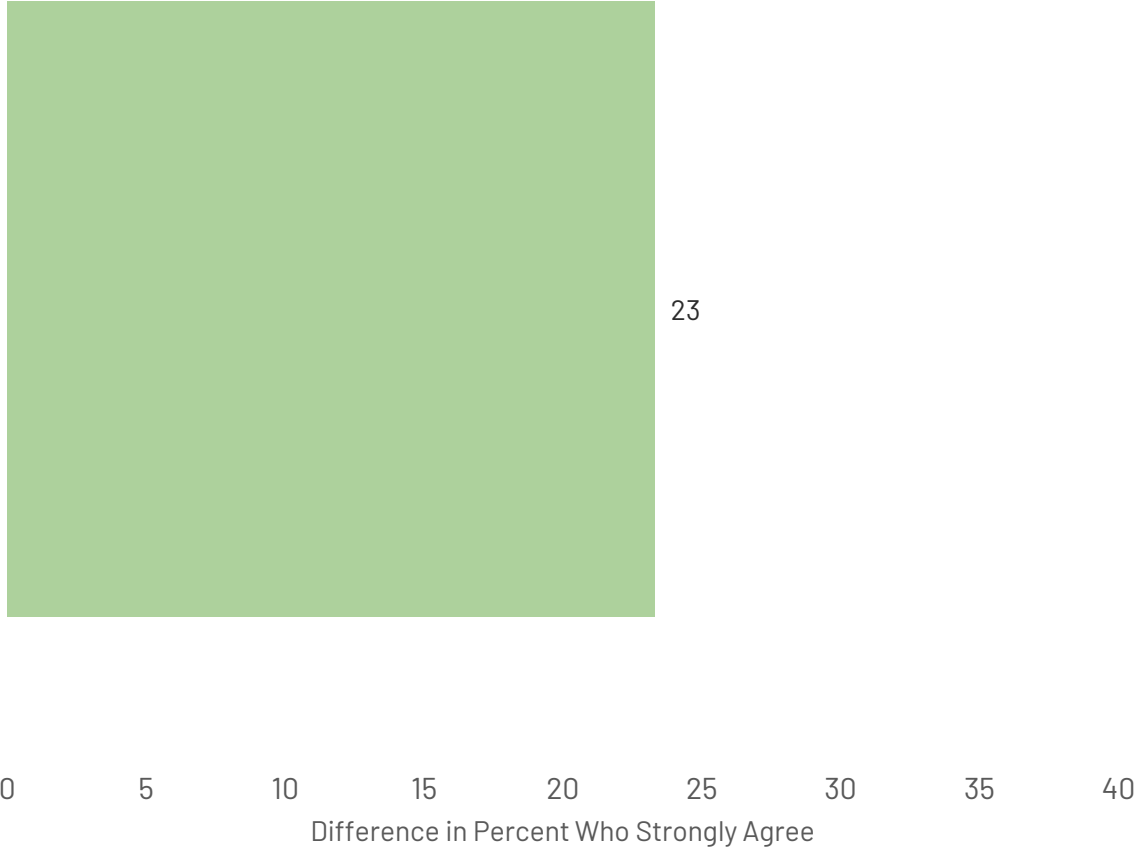


KENTUCKY VS. NORTH CAROLINA:
DESTINATION IMAGE
STRENGTHS AND WEAKNESSES

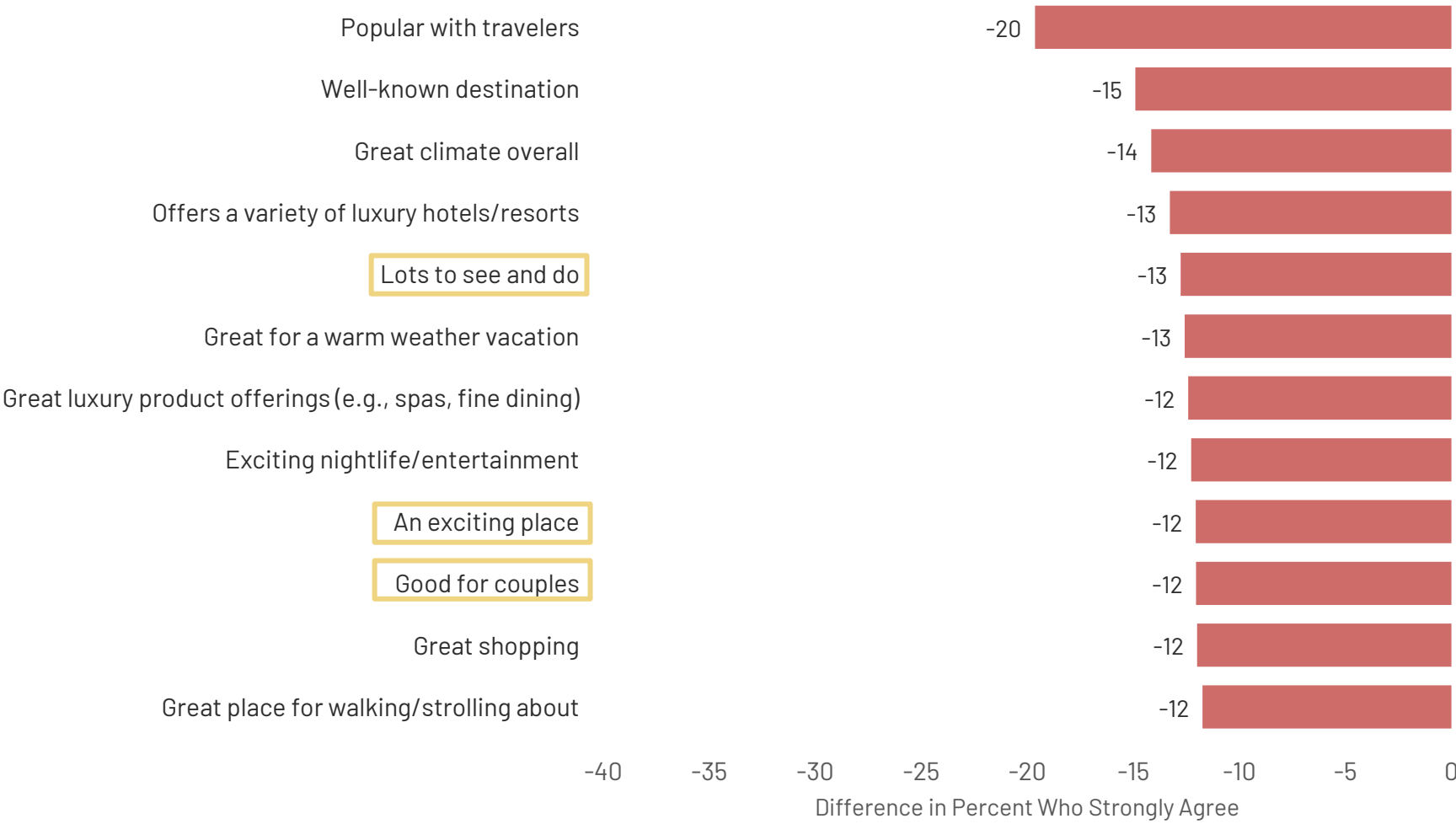
DESTINATION IMAGE STRENGTHS VS. NORTH CAROLINA

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

Unique distillery tours



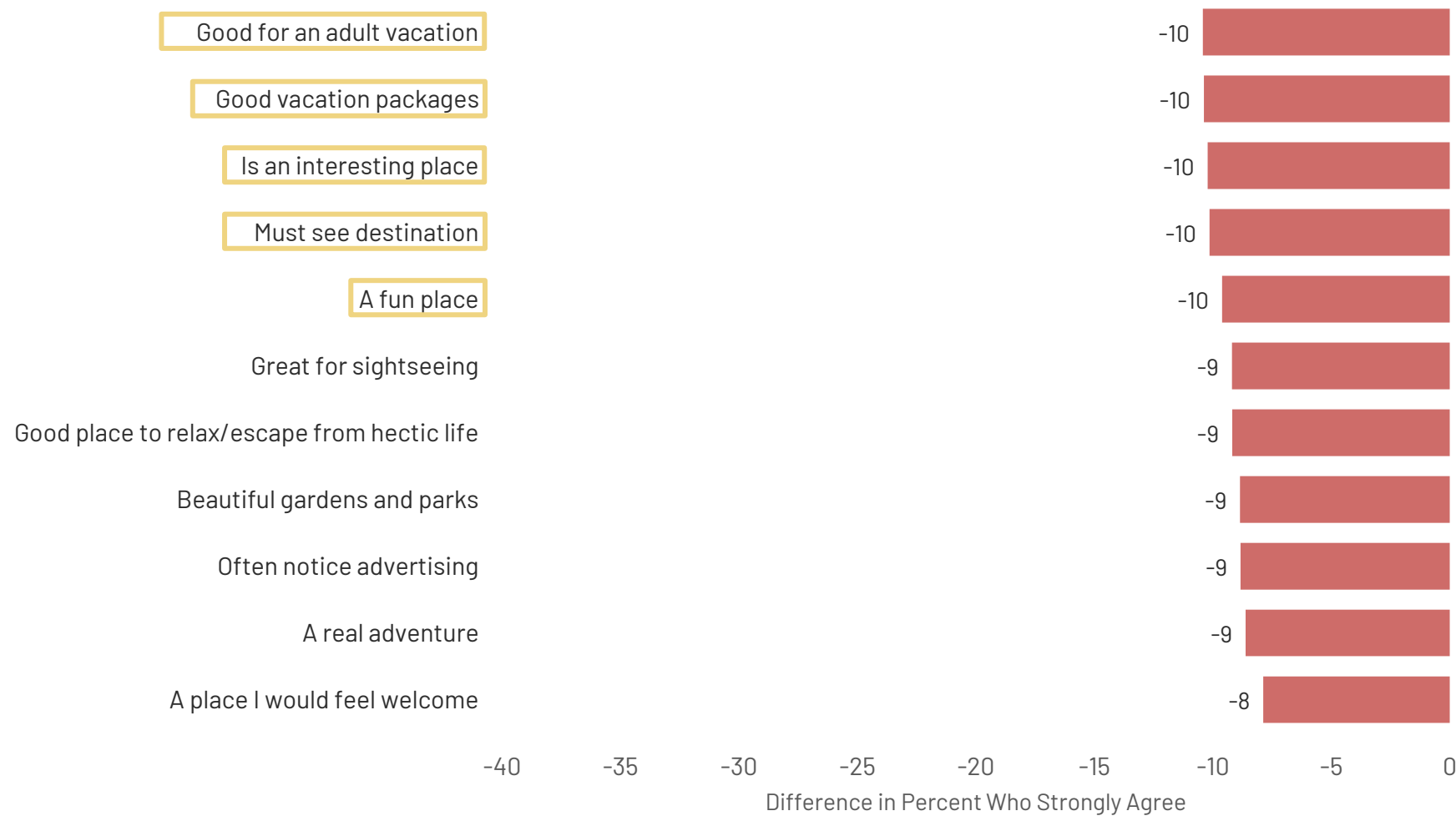
DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Total Markets

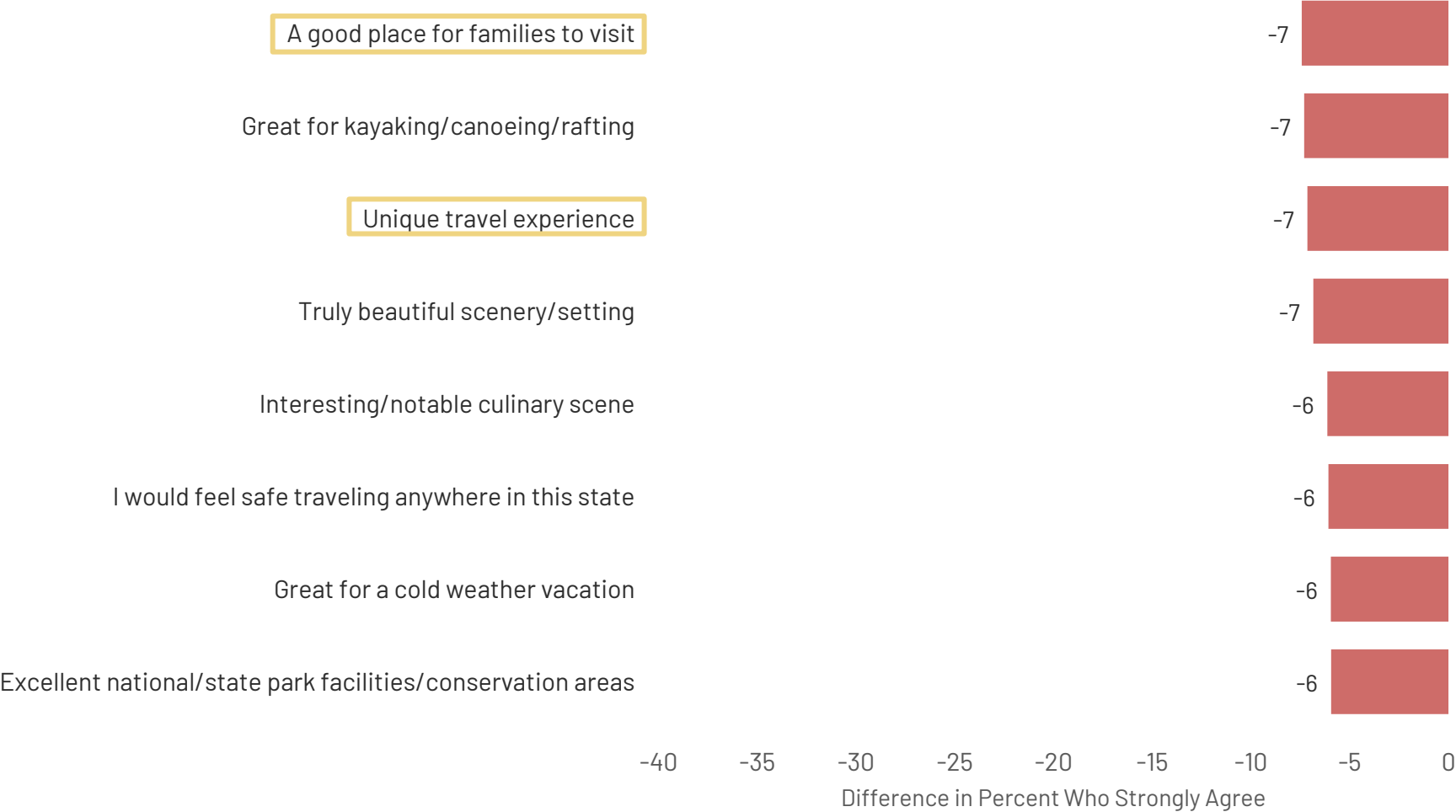
DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Total Markets

DESTINATION IMAGE WEAKNESSES VS. NORTH CAROLINA



Hot Button

Base: Total 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 and to the right, integrated into the letter "o" of "Longwoods".