



Kentucky 2025 Return on Investment

Table of Contents

- 3. Project Overview & Methodology
- 10. Key Findings
- 17. Advertising Return on Investment
- 29. Advertising Awareness
- 36. Brand Health Overview
- 41: Brand Health: Hot Buttons
- 47. Advertising Impact on Destination Perceptions
- 51. Brand Health: Product Delivery
- 54. Brand Health: Kentucky vs Competitive Set
- 67. Halo Effect
- 72. Media Diagnostics
- 75. Destination Visitation & Interest
- 81. Appendix: Individual Ad Summary
- 84. Appendix: Total Markets Destination Perceptions
- 105. Appendix: Existing Markets Brand Health and Halo
- 122. Appendix: New Markets Brand Health and Halo
- 139. Appendix: Glossary



Project Overview & Methodology



Who We Are

Longwoods International History

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 across the U.S., Longwoods conducts strategic market research for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods International works with over 150 Destinations and Brands.

Destination Marketing Research Services

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

- Overnight and day visitor profiles through **Travel USA**.
- **Return on Investment** of advertising campaigns,
- **Brand Health and Image Assessment** research provides insights into how travelers view leisure travel destinations, and measures advertising impact on a destination's image.
- **"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.

Longwoods International: The Gold Standard

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.

Kentucky 2025

ROI Project Timeline



Scope of Project Work



Return on Investment

Measure short-term conversion that occurred during and shortly after the campaign period



Advertising Awareness

Measure awareness of Kentucky Tourism's Spring and Fall 2025 Advertising Campaigns



Brand Health Assessment

Measure traveler perceptions of Kentucky as a leisure travel destination

Research Overview

Advertising Return on Investment & Brand Health Assessment



- Longwoods was engaged to conduct a program of research designed to measure the ROI and advertising awareness of the Kentucky **advertising campaigns**. Advertising Awareness is based on paid or owned media included in the study.
 - Campaign Dates: Spring - Fall 2025
 - Media Types: Video, Digital, Social, OOH, Print, Audio
- 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**. Advertising ROI results measure **leisure travel**.
- 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.

Methodology

Advertising Return on Investment & Brand Health Assessment

Sample Markets + Respondent Distribution

Unless otherwise noted, the base for all data is by total (inclusive of all markets below).

Existing Markets (1000)

ATLANTA (185)
BOWLING GREEN (11)
CHARLESTON-HUNTINGTON (25)
CHICAGO (240)
CINCINNATI (65)
COLUMBUS, OH (70)
EVANSVILLE (20)
INDIANAPOLIS (80)
KNOXVILLE (35)
LEXINGTON (37)
LOUISVILLE (45)
NASHVILLE (80)
PADUCAH-CAPE GIRARDEAU-HARRISBURG (27)
SAINT LOUIS (80)

Sample Markets + Respondent Distribution

Unless otherwise noted, the base for all data is by total (inclusive of all markets below).

New Markets (1000)

BALTIMORE (50)
CHAMPAIGN-SPRINGFIELD-DECATUR (15)
CHARLOTTE (55)
CLEVELAND-AKRON (CANTON) (60)
DALLAS-FORT WORTH (130)
DAYTON (20)
DETROIT (80)
GRAND RAPIDS-KALAMAZOO-BATTLE CREEK (35)
NEW YORK (360)
ORLANDO-DAYTONA BEACH-MELBOURNE (75)
WASHINGTON, DC (HAGERSTOWN) (120)

Methodology

Advertising Return on Investment & Brand Health Assessment

Survey Methodology

- Survey fielded in 25 target 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 March 2026. Median survey length was 17 minutes. For a sample of this size, the confidence level is 19 times out of 20, with a margin of error of + / -3.
- Disclaimer on AI Usage: This report was produced by Longwoods International with limited assistance from artificial intelligence (AI) tools. An AI platform was used to auto-format charts, fonts, and other visual elements, and AI was also used to help generate ideas for the 'Next Steps to Consider' section (slides 15 and 16). All narrative content, analysis, and final wording in this report were written and edited by Longwoods International. Longwoods International uses only closed (proprietary) AI solutions and platforms in its workflow.

*Adults 18 years of age or older who have taken at least one day or overnight leisure trip in the past 3 years and intend to take one in the next 2 years.



Key Findings

Key Findings Summary

Kentucky 2025 Ad Campaign ROI & Brand Health



ROI Executive Summary

Kentucky Tourism's Spring and Fall 2025 campaign delivered strong financial performance. A \$14.6 million advertising investment generated 3.77 million incremental trips, \$613.7 million in incremental visitor spending, and \$45.8 million in incremental tax revenues. This equates to a spending ROI of \$42 for every \$1 invested and a tax ROI of \$3 for every \$1 invested, with a cost per incremental trip of about \$3.86 and roughly 3 incremental trips per \$10 in ad spend. Campaign awareness reached 59% overall in the total markets. Video ads performed best with 48% awareness, followed by digital at 44%, print at 38%, OOH at 35%, social at 35%, and audio at 25%. Those aware of the campaign were 20 points more likely to strongly agree that Kentucky is a place I'd really enjoy visiting, 53% among those aware versus 33% among those unaware.

BHA Executive Summary

Kentucky was broadly competitive with the total competitive set on overall destination appeal, with 45% of respondents strongly agreeing Kentucky is a place they'd really enjoy visiting versus 46% for the total competitive set. Kentucky's clearest reputational strength versus the combined competitive set was unique distillery tours, where the state held a 24-point advantage. Kentucky's top competitive weaknesses versus the combined competitive set included exciting nightlife and entertainment, a variety of luxury hotels and resorts, great for professional or college sporting events, great luxury product offerings, and great shopping.

Key Findings Summary

Kentucky 2025 Ad Campaign ROI & Brand Health

ROI & Ad Effectiveness

- Advertising investment: \$14.6M; incremental trips: 3.77M; incremental visitor spending: \$613.7M; incremental taxes: \$45.8M.
- Spending ROI: \$42 in visitor spending for every \$1 invested; tax ROI: \$3 in tax revenue for every \$1 invested.
- Campaign efficiency: cost per incremental trip of approximately \$3.86, and about 3 incremental trips generated per \$10 in ad spend.
- Overall campaign awareness reached 59% among total-market travelers.
- Awareness by medium: video 48%, digital 44%, print 38%, OOH 35%, social 35%, and audio 25%.

Brand Health: Hot Buttons, Ad Impact, & Product Delivery

- Ten key hot buttons include: must see destination, is an interesting place, an exciting place, a fun place, lots to see and do, popular with travelers, a real adventure, good for an adult vacation, great for sightseeing, and a good place for families to visit.
- “A place I’d really enjoy visiting”: 53% of those aware of the campaign strongly agreed vs. 33% of those unaware, a 20-point reputational lift.
- All 10 hot buttons were rated significantly higher by those aware of the campaign versus those unaware.
- Largest ad-driven lifts on hot buttons included: a real adventure (+19 points), popular with travelers (+20 points), and an exciting place (+19 points).
- Largest recent visitor lifts on hot buttons included: a good place for families to visit (+24 points), good for an adult vacation (+23 points), and an exciting place (+21 points).

Key Findings Summary

Kentucky 2025 Ad Campaign ROI & Brand Health

Brand Health: Kentucky vs. Competitors

- “A place I’d really enjoy visiting” percent who strongly agree: Kentucky 45%, total competitive set 46%, Tennessee 61%, North Carolina 57%, Georgia 54%, West Virginia 40%, Ohio 32%, and Indiana 29%, .
- Kentucky’s strongest relative performance is against Indiana, Ohio, and West Virginia, while Tennessee and North Carolina set the highest benchmark on overall destination appeal as “a place I’d really enjoy visiting.”
- Kentucky’s top strength versus the total competitive set is unique distillery tours, with a 24-point reputational advantage.
- Top competitive weaknesses versus the total competitive set include: exciting nightlife/entertainment (-11 points), offers a variety of luxury hotels/resorts (-8 points), great for professional or college sporting events (-6 points), great luxury product offerings (-6 points), and great shopping (-6 points).
- At the perception-grouping level, Kentucky overperforms Indiana and Ohio in most groupings, ties or exceeds West Virginia in many areas, performs comparably to Georgia in unique and worry-free, and underperforms Tennessee across all measured groupings.

Media Diagnostics, Visitation, & Intent to Visit

- Most respondents say Kentucky Tourism’s advertisements clearly showcase the destination (84%), inspired them to visit (68%), and highlighted aspects important to them (67%), while few found the ads unappealing or ordinary.
- Ever visited: Tennessee 51%, North Carolina 49%, Georgia 48%, Ohio 43%, Kentucky 37%, Indiana 34%, and West Virginia 28%.
- Visited in the past two years, among those who have ever visited: Tennessee 56%, Ohio 56%, Indiana 55%, Kentucky 53%, North Carolina 51%, Georgia 50%, West Virginia 48%.
- Intent to visit in the next 12 months: Tennessee 50%, North Carolina 45%, Georgia 43%, Kentucky 38%, Ohio 34%, West Virginia 34%, Indiana 28%. Kentucky clearly outperforms Indiana.
- Across media channels, social (+22 points), print (+22 points), and audio (+21 points) generated the strongest lifts on “makes me want to visit Kentucky,” while video posted the lowest lift (+18 points), though all media types were directionally positive.

New Markets vs. Existing Markets Key Findings

Kentucky 2025 Ad Campaign ROI & Brand Health

New Markets

- New markets accounted for \$5.9M in ad investment and generated 1.10M incremental trips, \$220.1M in incremental visitor spending, and \$16.4M in incremental taxes.
- New-market spending ROI was \$37 and tax ROI was \$3. Campaign efficiency in new markets equaled \$5.40 per incremental trip and 2 incremental trips per \$10 in ad spend.
- Overall awareness in new markets was 59%, matching the total-market awareness rate.
- New markets therefore delivered substantial incremental volume, but at lower efficiency than existing markets, indicating room to improve conversion and messaging as these audiences mature.

Existing Markets

- Existing markets accounted for \$8.6M in ad investment and generated 2.67M incremental trips, \$393.5M in incremental visitor spending, and \$29.4M in incremental taxes.
- Existing-market spending ROI was \$46 and tax ROI was \$3. Campaign efficiency in existing markets equaled \$3.23 per incremental trip and 3 incremental trips per \$10 in ad spend.
- Overall awareness in existing markets was 61%.
- Existing markets drove stronger efficiency and higher return, suggesting Kentucky's nearer-term performance still benefits from established familiarity, prior visitation, and a shorter path from awareness to action.

Next Steps to Consider

Kentucky 2025 Ad Campaign ROI & Brand Health

Double Down on Kentucky's Signature Advantage: Distillery Tourism

- Build thematic trip itineraries that connect distilleries with culinary, small-town, and scenic experiences.
- Use distillery-led messaging in conquest campaigns against nearby competitors where Kentucky needs clearer differentiation.
- Tie distillery experiences to longer-stay packages so the state's strongest perception advantage also drives higher spend per trip.

Protect and Grow Existing Markets as Kentucky's ROI Engine

- Maintain strong presence in existing markets where conversion efficiency is already strongest.
- Use tailored creative that assumes some familiarity and focuses more on new reasons to return.
- Test loyalty-style messaging that rewards prior visitors with fresh itineraries and hidden-gem experiences.
- Promote shoulder-season, event-based, and repeat-visit messaging in these markets to deepen yield.

Next Steps to Consider

Kentucky 2025 Ad Campaign ROI & Brand Health

Address Weaknesses in Nightlife, Luxury, and Shopping Head-On

- Develop selective messaging that broadens Kentucky's image beyond heritage and outdoor experiences.
- Highlight cities, entertainment districts, culinary scenes, and premium stays where Kentucky can credibly compete.
- Avoid overpromising statewide luxury; instead, spotlight the places and products that can authentically support the claim.

Turn the Halo Effect into a Broader Value Narrative

- Tourism advertising improved all six measured economic-development perceptions by at least 16 points among those aware versus unaware.
- Incorporate halo-effect findings into stakeholder communications, legislative materials, and partner presentations.
- Coordinate with economic-development and business-recruitment partners on shared storytelling themes.

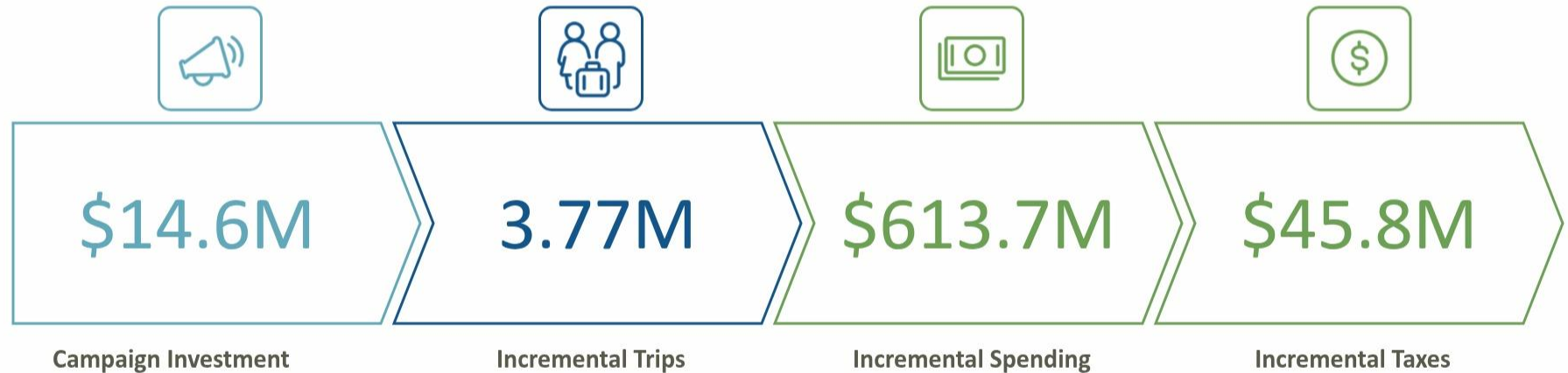


Advertising Return on Investment

Advertising Return on Investment

Total Markets Incremental Results

A targeted advertising investment of \$14.6 million generated **3.77 million incremental trips** to the destination. These additional visits resulted in **\$613.7 million in incremental visitor spending**, which ultimately produced **\$45.8 million in incremental tax** revenues for the destination.



Advertising Return on Investment

Existing, New, and Total Markets **Incremental Results**

	Existing Markets	New Markets	Total
Ad Investment	\$8.6 M	\$5.9 M	\$14.6 M
Incremental Trips	2.67 M	1.10 M	3.77 M
Incremental Visitor Spending	\$393.5 M	\$220.1 M	\$613.7 M
Incremental Taxes	\$29.4 M	\$16.4 M	\$45.8 M

Every \$1 in Advertising Investment Generated

Total Markets

\$3

Direct Taxes in Kentucky

Every \$1 in Advertising Investment Generated

Total Markets

\$42

Direct Visitor Spending in
Kentucky

Advertising Return on Investment

Existing, New, and Total Markets **Bottom Line**

	Existing Markets	New Markets	Total
Spending ROI	\$46	\$37	\$42
Tax ROI	\$3	\$3	\$3

Campaign Efficiency

A Closer Look at Media Spend and Incremental Trips

Each incremental trip earned by the Spring & Fall Campaigns cost \$3.86 in ad spend, and every \$10 spent resulted in 3 trips.



Campaign Efficiency

A Closer Look at Media Spend and Incremental Trips for **Existing, New, and Total Markets**

	Existing Markets	New Markets	Total
 Ad \$'s Per 1 Incremental Trip	\$3.23	\$5.40	\$3.86
 Incremental Trips for \$10 Ad \$	3	2	3

2025 Return on Investment Summary

Total Markets

Ad Investment

\$14.6M

Incremental Trips

3.77M

Incremental Spending

\$613.7M

Incremental Taxes

\$45.8M

Spending ROI

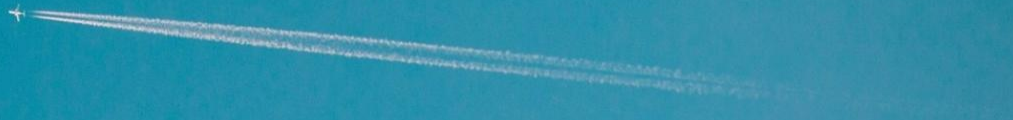
\$42

Tax ROI

\$3



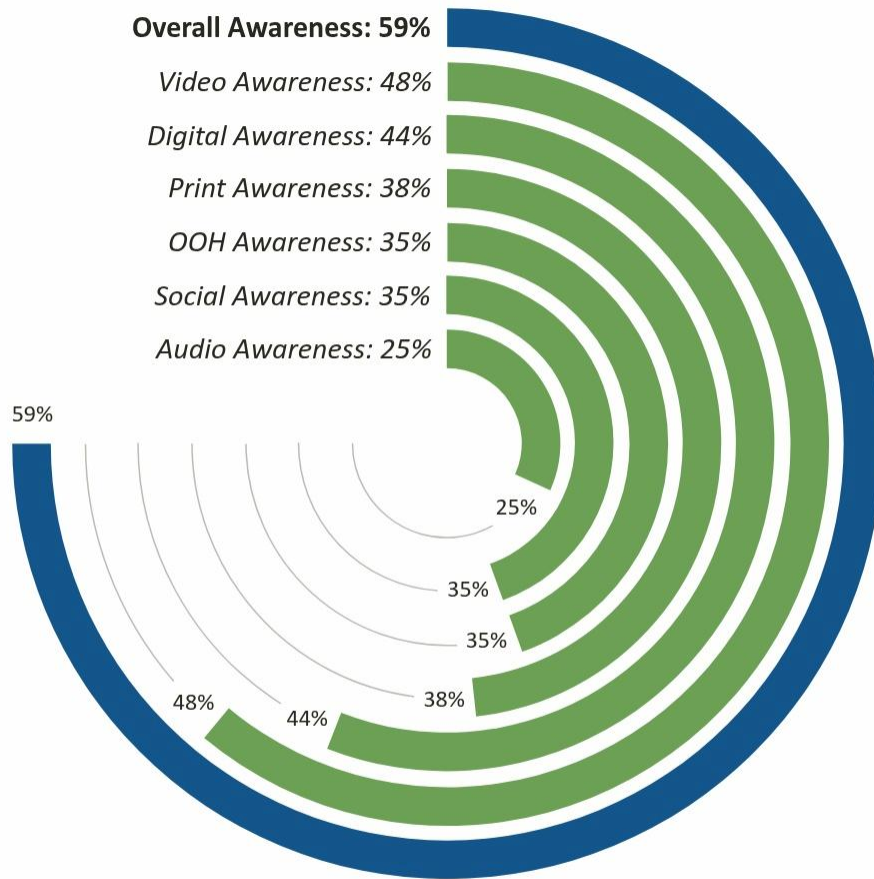
Advertising Awareness



Awareness of the **Kentucky Spring and Fall 2025** Advertising Campaigns

Kentucky Tourism's Spring and Fall 2025 advertising campaign achieved an overall awareness rate of 59%.

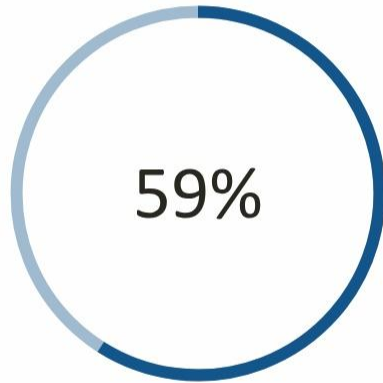
Video ads led the individual medium performance with a 48% level of awareness. Followed by Digital (44%), Print (38%), OOH (35%), Social (35%), and Audio (25%) ads.



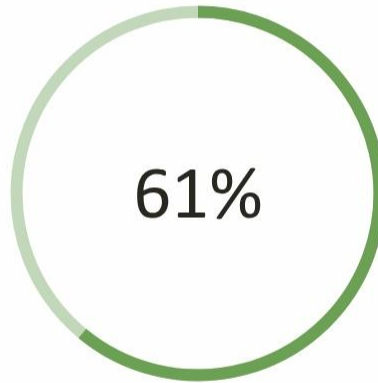
Based on markets where shown. Recalled awareness of at least one paid or owned advertisement.

Awareness of the **Kentucky Spring and Fall 2025** Advertising Campaigns

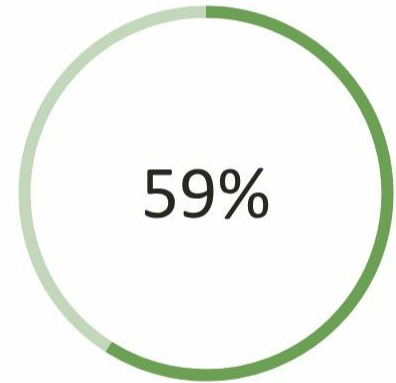
Existing & New Markets Overall Awareness



Overall Awareness



Existing Markets Awareness

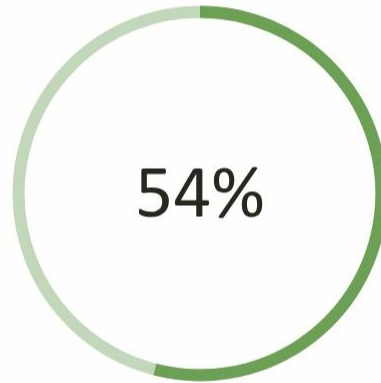


New Markets Awareness

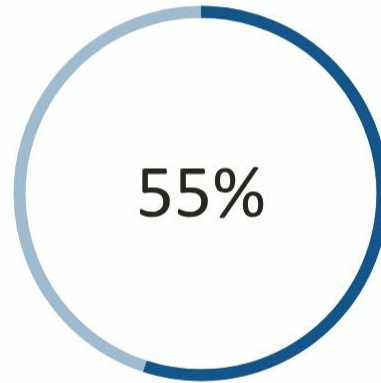
Based on markets where shown. Recalled awareness of at least one paid or owned advertisement.

Awareness of the **Kentucky Spring and Fall 2025** Advertising Campaigns

Spring & Fall Campaign Advertising Awareness



Spring Awareness



Fall Awareness

Based on markets where shown. Recalled awareness of at least one paid or owned advertisement.

Top 3 Recalled Individual Ads

Awareness of the Kentucky Spring and Fall 2025 Advertising Campaigns



Video Spring 30s

34% Aware

Video



Video Fall Dynamos

32% Aware

Video



Video Fall 30s

31% Aware

Video

Based on markets where shown. Recalled awareness of individual ads.

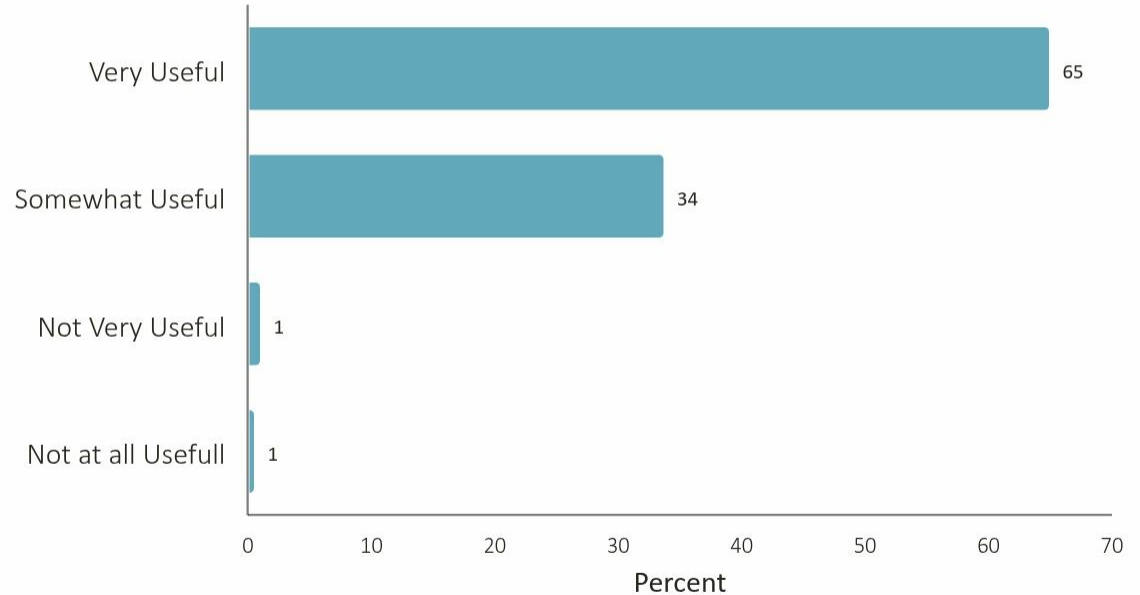
Kentucky Tourism Website

Awareness & Usage of Kentucky Tourism Website

Aware of Kentucky Tourism Website

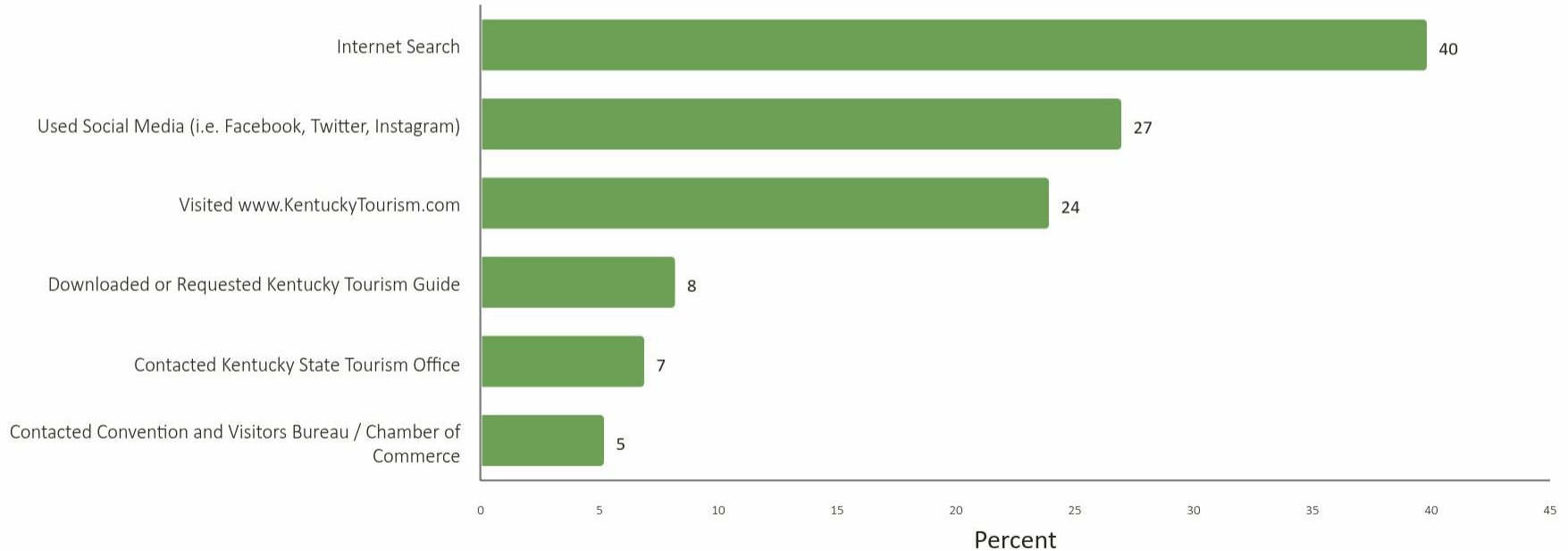
13%

How useful was the Kentucky Tourism website?



Actions Taken after Seeing a **Kentucky Tourism Ad**

After seeing a Kentucky Tourism ad, what action did you use to obtain information about traveling to Kentucky on a day or overnight leisure trip from any of the following?





Brand Health Overview

Brand Health Overview

Understanding Travelers' Perceptions of **Kentucky** as a **Leisure Travel Destination**



- Longwoods International's **Brand Health & Image Assessment** research provides insights into how travelers view Kentucky as a leisure travel destination.
- **Brand Health** analyzes **Kentucky's destination image** through a set of perception statements and attributes to uncover what is **important** to travelers and what **motivates** their travel decisions.
- Perception attributes are evaluated on **advertising impact, product delivery**, and **against key competitors**.

Brand Health Overview

Key Analyses and Definitions



- **Advertising Impact on Brand Health** evaluates the **reputational impact** of advertising awareness on a destination's image.
- **Product Delivery** evaluates the **reputational impact** of visitation on a destination's image.
- Destination perceptions are also analyzed against a **competitive set** to determine **key reputational strengths and weaknesses**.

- Perception attributes are reported on '**Percent Who Strongly Agree**', which is the percent of respondents giving a perception an agree/disagree rating of **8, 9 or 10** out of 10.
- When comparing the perception ratings of two groups, the '**difference in percent who strongly agree**' is reported. **Positive differences** are **strengths**, while **negative differences** are **weaknesses**.

- The perception statement **A Place I'd Really Enjoy Visiting** is a key indicator of likelihood to visit a destination. This statement is correlated against with other destination perception attributes to determine **Hot Buttons**.

Brand Health Overview

Perception Groupings & Destination Perception Attributes/Statements

Sports and Recreation

Great for outdoor recreation (e.g., hiking, backpacking, camping)

Excellent national/state park facilities/conservation areas

Great for professional or college sporting events

Great for kayaking/canoeing/rafting

Unique

Unique distillery Tours

Interesting local people/cultures/customs/traditions

Unique travel experience

Interesting/notable culinary scene

Worry-Free

Warm, friendly people

A place I would feel welcome

Good place to relax/escape from hectic life

Getting around the state is easy

I would feel safe traveling anywhere in this state

Adult Appeal

Good for an adult vacation

Good for couples

Sightseeing

Truly beautiful scenery/setting

Interesting cities/small towns

Beautiful gardens and parks

Great place for walking/strolling about

Great for sightseeing

Is an interesting place

Lots to see and do

Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)

Great shopping

Family Atmosphere

A good place for families to visit

Brand Health Overview (Cont'd)

Perception Groupings & Destination Perception Attributes/Statements

Affordable

Not too far away or expensive to consider for a vacation

Affordable accommodations and dining options

Excellent value for the money

Good vacation packages

Popular

Well-known destination

Popular with travelers

Often notice advertising

Entertainment

Interesting festivals/fairs/events

Great live music

Exciting nightlife/entertainment

Great for theatre and the performing arts

Exciting

A real adventure

A fun place

Must see destination

An exciting place

Luxurious

Offers a variety of luxury hotels/resorts

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

Climate

Great for a warm weather vacation

Great climate overall

Great for a cold weather vacation



Brand Health: Hot Buttons



Hot Button

Top 10 Perception Attributes/Statements most closely tied to destination selection

What is a Hot Button?

Hot Buttons are the **top 10 perception** attributes/statements most closely tied to destination selection in Kentucky's total markets.

Hot buttons are determined by correlating each individual perception attribute to "**A place I'd really enjoy visiting**" and looking at the attributes with the strongest positive correlation values.

Hot Buttons are inclusive of all destinations within the Brand Health Perception question.

Why do Hot Buttons Matter?

Due to their strong positive correlation to "**A place I'd really enjoy visiting**", Hot Buttons are key indicators of destination selection amongst travelers.

Hot buttons are high on travelers' '**wish list**' when selecting a destination. They provide a deeper dive into travelers' minds to understand what they consider important within a destination to be '**a place I'd really enjoy visiting**'.

Hot Buttons

Top 10 Perceptions most closely tied to destination selection in Kentucky's total markets*

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



Hot Buttons

- Must see destination
- Is an interesting place
- An exciting place
- A fun place
- Lots to see and do
- Popular with travelers
- A real adventure
- Good for an adult vacation
- Great for sightseeing
- A good place for families to visit



Hot Buttons are noted throughout the Brand Health Assessment with a sun icon

Impact of Awareness on Hot Buttons

The campaign creative had a positive impact on travelers' perceptions of Kentucky.

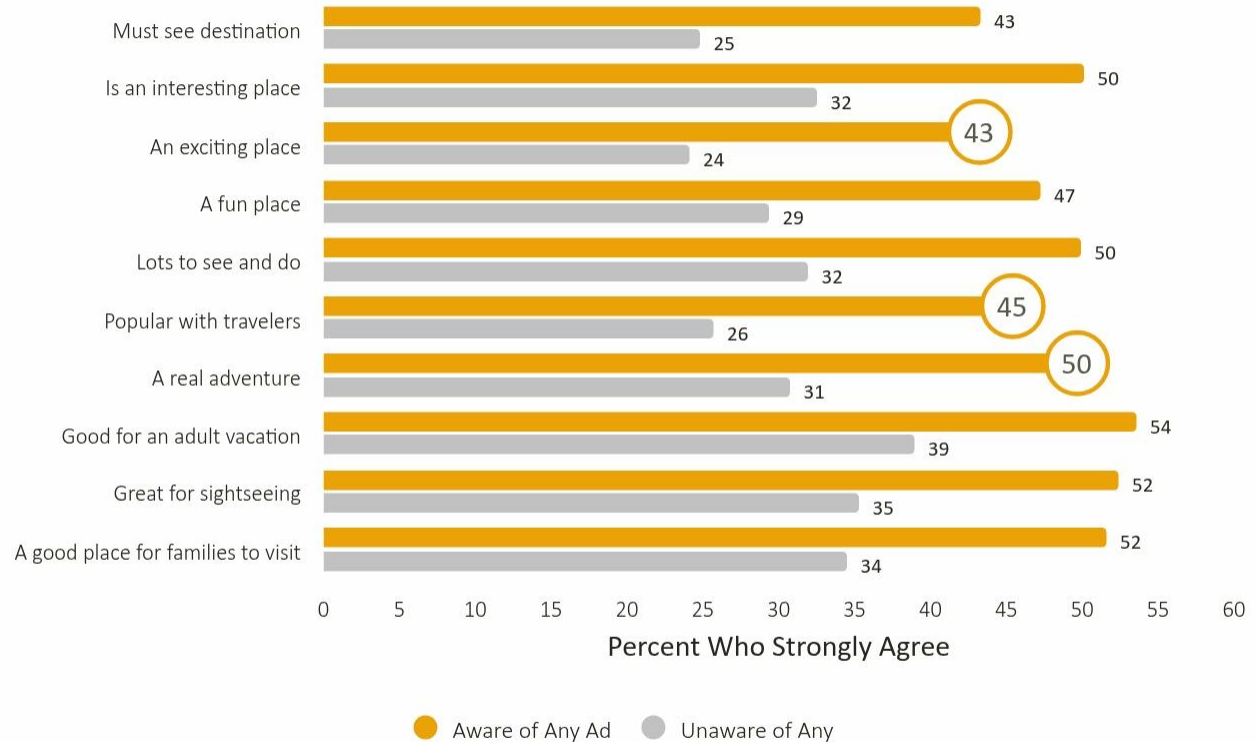
Those exposed to the campaign rated the destination significantly higher than those unaware of the ads in all 10 of the Hot Buttons. Ad awareness had the greatest impact on the following perception statements:

A real adventure

Popular with travelers

An exciting place

The Top 3 Hot Buttons with the greatest reputational lifts are circled below



Impact of Visitation on Hot Buttons

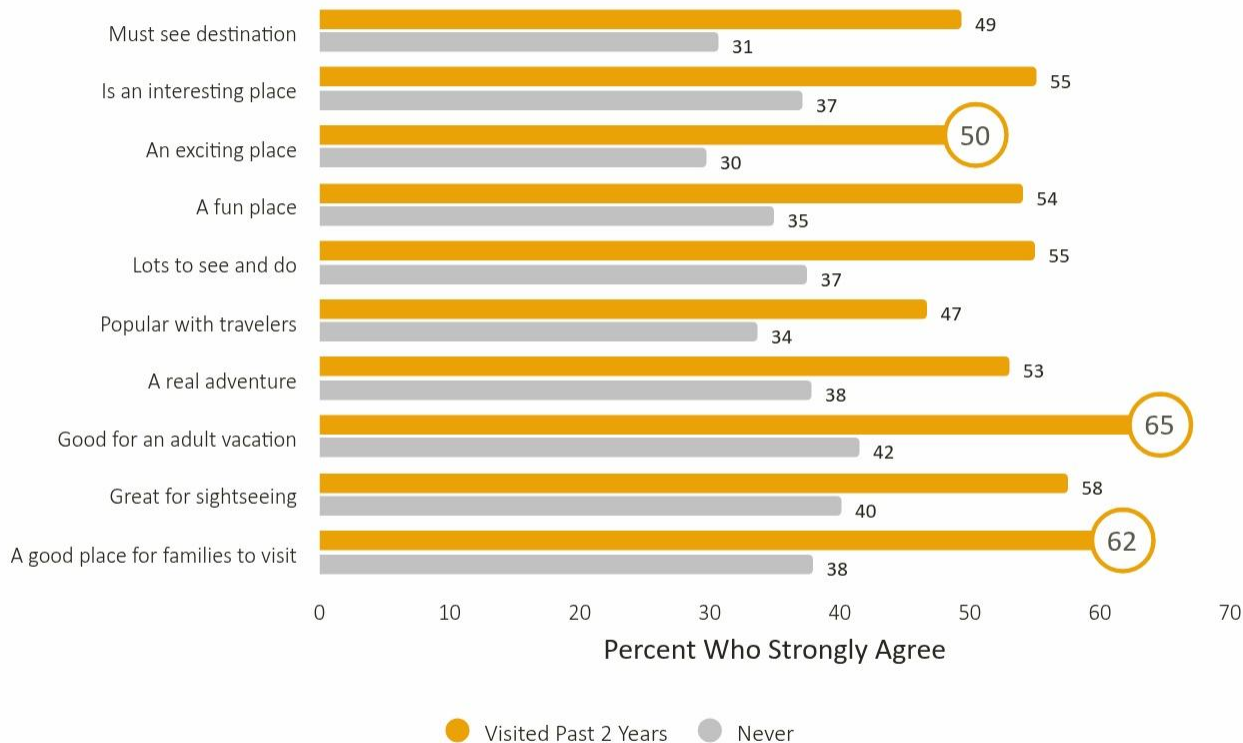
Recent visitors to Kentucky rated the destination more favorably than those who never visited, in all 10 Hot Buttons. Recent visitation had the greatest impact on the following perception statements:

Good for an adult vacation

A good place for families to visit

An exciting place

The Top 3 Hot Buttons with the greatest reputational lifts are circled below



Impact of Awareness and Visitation on Hot Buttons

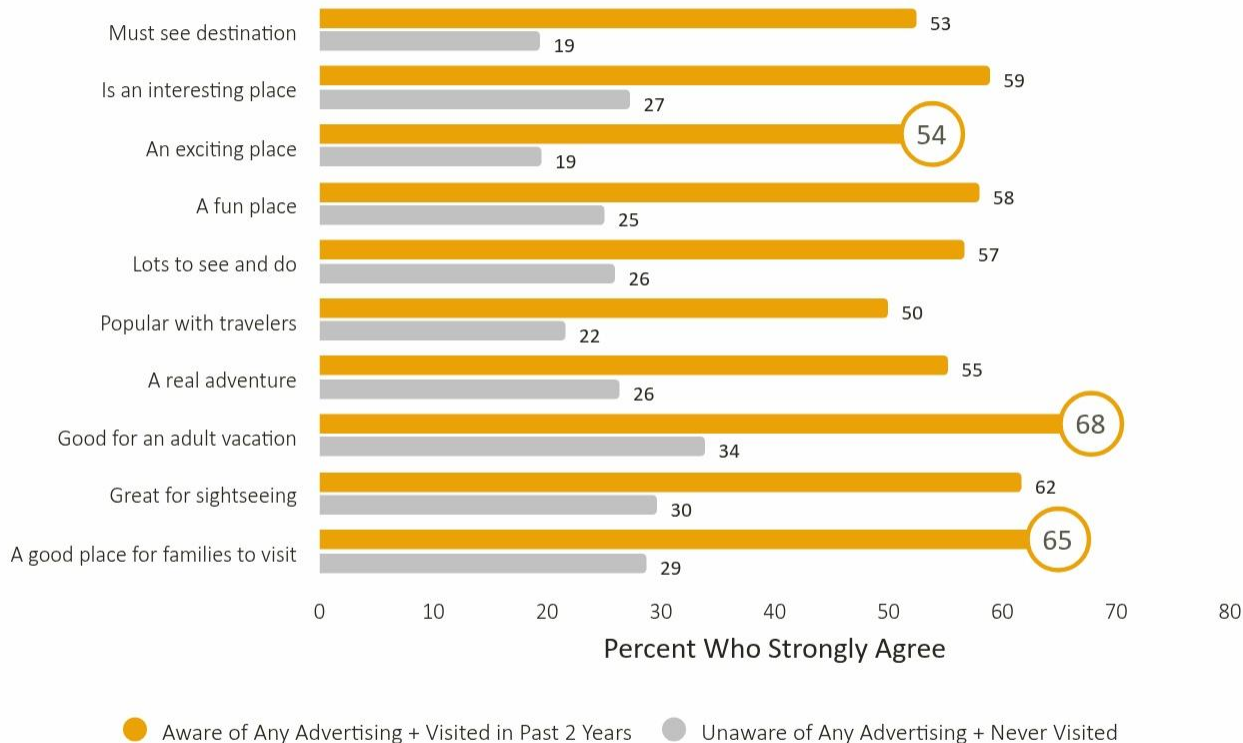
The greatest positive reputational lift comes when travelers are both exposed to the Kentucky Tourism campaign and have visited the destination in the past two years. The combination of ad awareness and visitation had the greatest impact on the following perception statements:

Good for an adult vacation

A good place for families to visit

An exciting place

The Top 3 Hot Buttons with the greatest reputational lifts are circled below





Advertising Impact on Destination Perceptions



Advertising Impact on Overall Destination Perception

Reputational Lift of Awareness on A Place I'd Really Enjoy Visiting

The Kentucky campaign earned a

20 point

Reputational Lift

for Kentucky is “a place I'd really enjoy visiting” .

This campaign had a positive impact on travelers' perceptions of Kentucky

Percent who strongly agree **Kentucky** is "A place I'd really enjoy visiting"

53%



Aware of Ad Campaign

33%



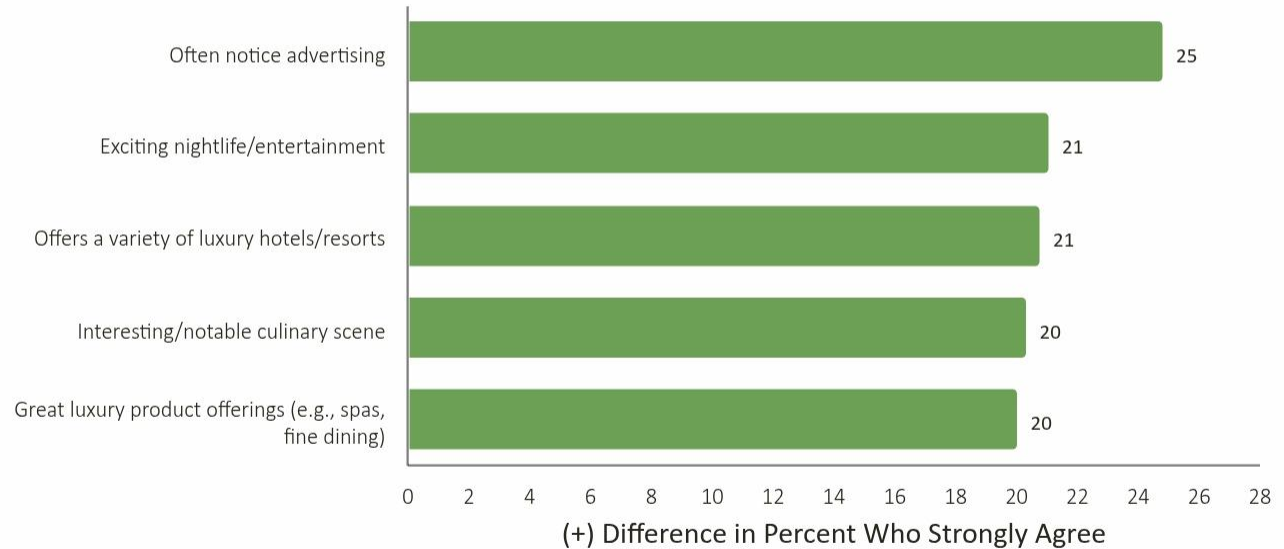
Unaware of Ad Campaign

Advertising Impact on Destination Perceptions

Reputational Lift of those Aware of Advertising vs. Unaware of Advertising

Awareness of the Kentucky Tourism campaign significantly improved the destination's reputation among travelers from total markets. With the greatest reputational lifts in often notice advertising, exciting nightlife/entertainment, offers a variety of luxury hotels/resorts, interesting/notable culinary scene, and great luxury product offerings (e.g., spas, fine dining).

Top 5 **STRENGTHS**: Aware of Advertising vs. Unaware of Advertising



Advertising Impact on Destination Perceptions

Reputational Gap of those **Aware of Advertising** vs. **Unaware of Advertising**

No reputational gaps in perceptions for those Aware vs Unaware of Advertising



Brand Health: Product Delivery

Impact of Visitation on Destination Perceptions

Reputational Lift of Recent Visitor* vs. Never Visited

Visitors to Kentucky view the destination significantly more favorably than non-visitors, particularly regarding the destination's appeal as being not too far away or expensive to consider for a vacation, offers unique distillery tours, and a place travelers would feel welcome. Additionally, there are two Hot Buttons in the top 5 destination perception strengths impacted by recent visitation:

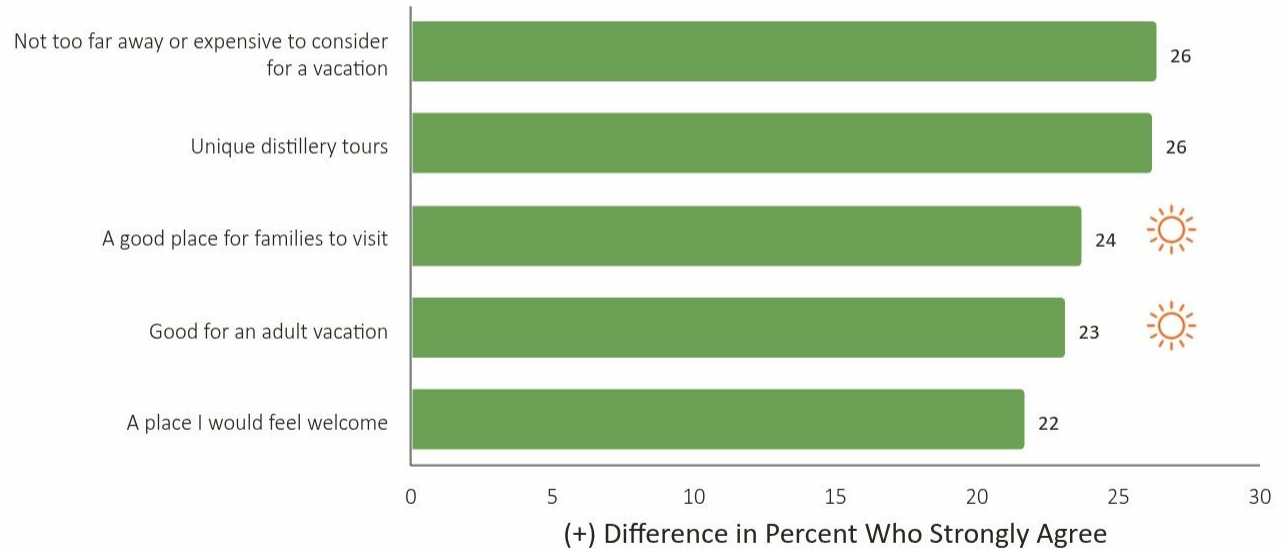
A good place for families to visit

Good for an adult vacation



Hot Button

Top 5 **STRENGTHS**: Recent Visitor* vs. Never Visited



*Visited in the Past 2 Years

Impact of Visitation on Destination Perceptions

Reputational Gap of Recent Visitor vs. Never Visited

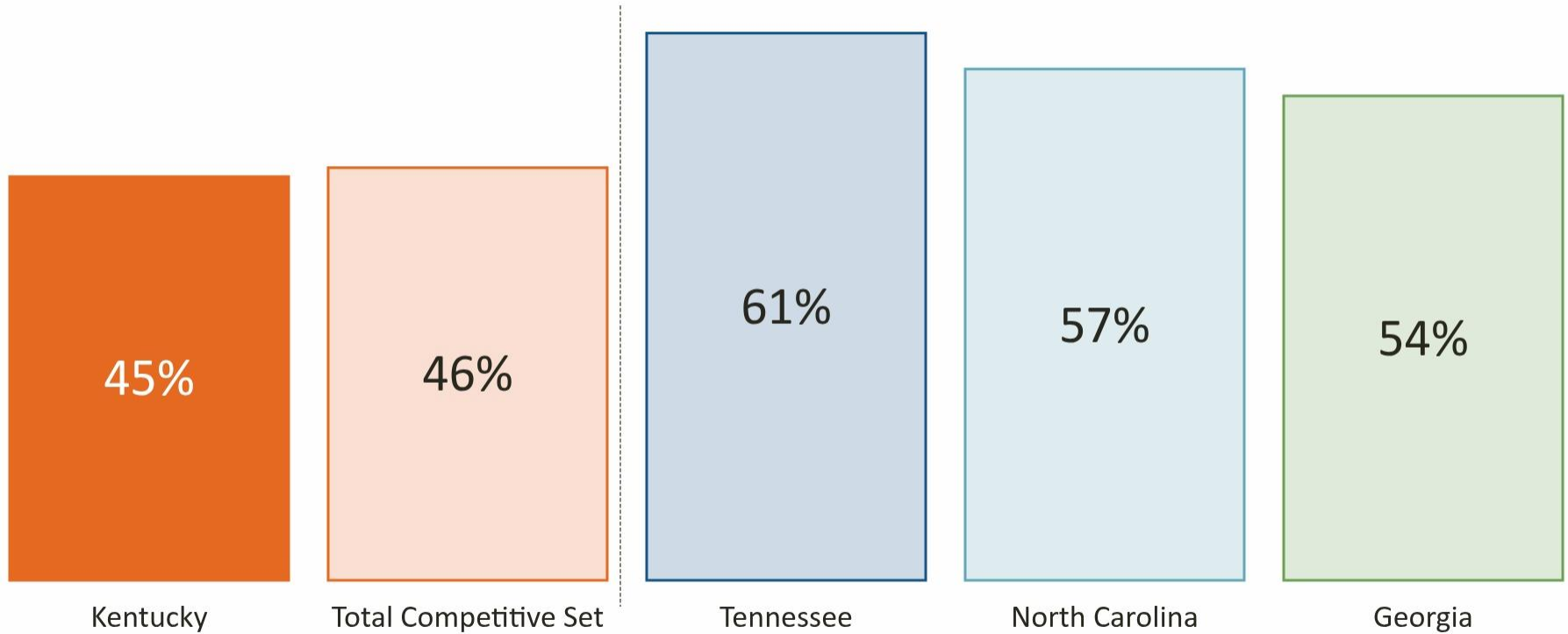
No reputational gaps in perceptions for Recent Visitors
vs Never Visited



Brand Health: Kentucky vs Competitive Set

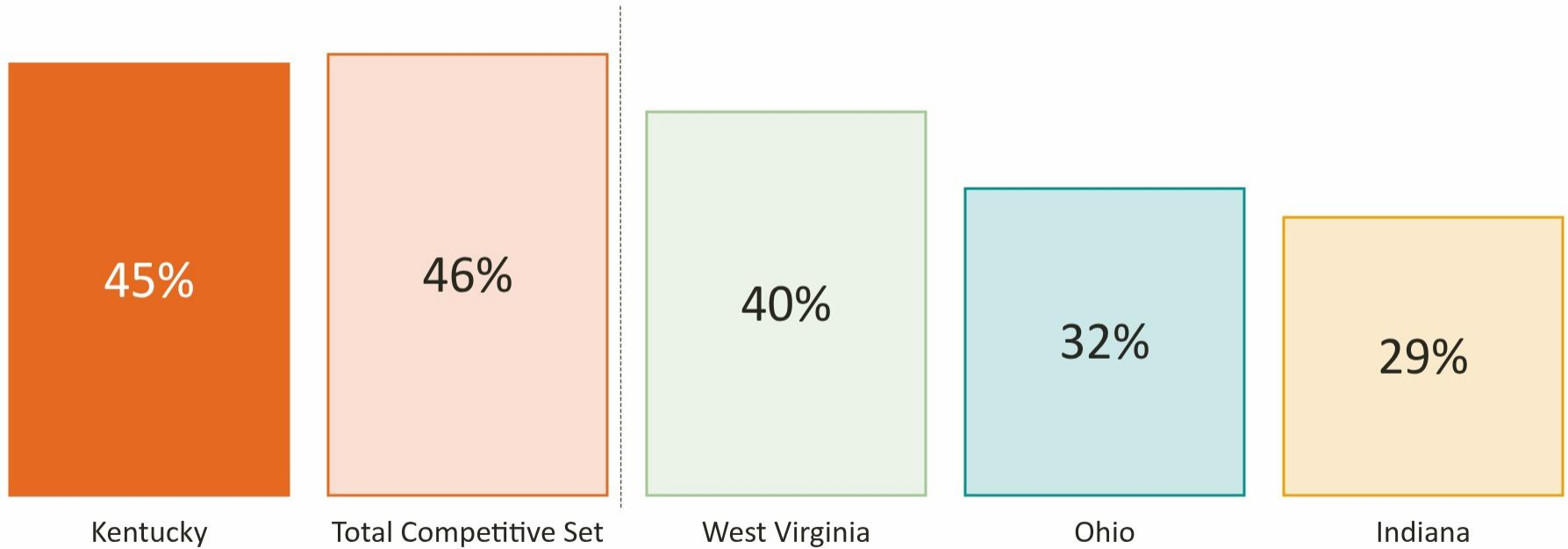
Destination Perceptions vs. Competitive Set

Percent Who Strongly Agree Destination is a **"A Place I'd Really Enjoy Visiting"**



Destination Perceptions vs. Competitive Set (Cont'd)

Percent Who Strongly Agree Destination is a **"A Place I'd Really Enjoy Visiting"**



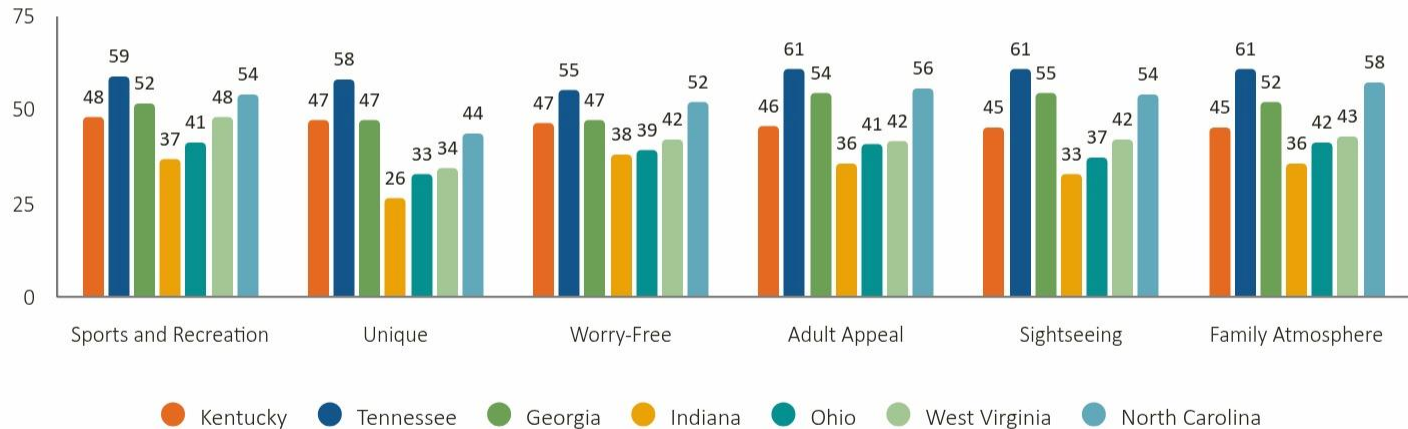
Brand Health: Perception Groupings

Kentucky vs. Individual Competitors as a Leisure Travel Destination

Perception groupings provide a **macro level** view of how travelers perceive Kentucky and its competitors as a leisure travel destination

Kentucky performs comparably to Georgia in the perception groupings unique & worry-free. Kentucky underperforms Tennessee in all groupings, but overperforms Indiana and Ohio in most perception groupings. Kentucky either overperforms or ties with West Virginia and when compared to North Carolina, Kentucky underperforms in all perception groupings except unique.

Percent Who Strongly Agree Each Destination Is...



Perception Groupings are the aggregated ratings of the perception attributes/statements within each grouping

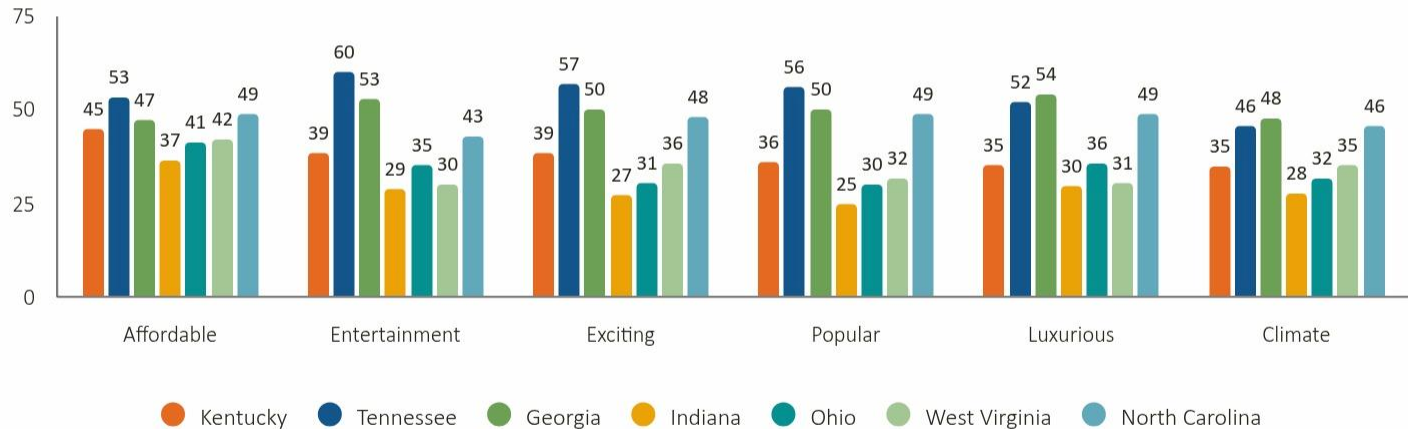
Brand Health: Perception Groupings (Cont'd)

Kentucky vs. Individual Competitors as a Leisure Travel Destination

Perception groupings provide a **macro level** view of how travelers perceive Kentucky and its competitors as a leisure travel destination

Affordable is the one perception grouping that is most comparable for all destinations; Kentucky ties with Georgia and West Virginia and overperforms Indiana and Ohio for this perception grouping. Tennessee, Georgia, and North Carolina overperform the remaining destinations for all remaining perception groupings listed.

Percent Who Strongly Agree Each Destination Is...



Perception Groupings are the aggregated ratings of the perception attributes/statements within each grouping

Kentucky vs. Total Competitive Set

Perception Strengths vs Total Competitive Set

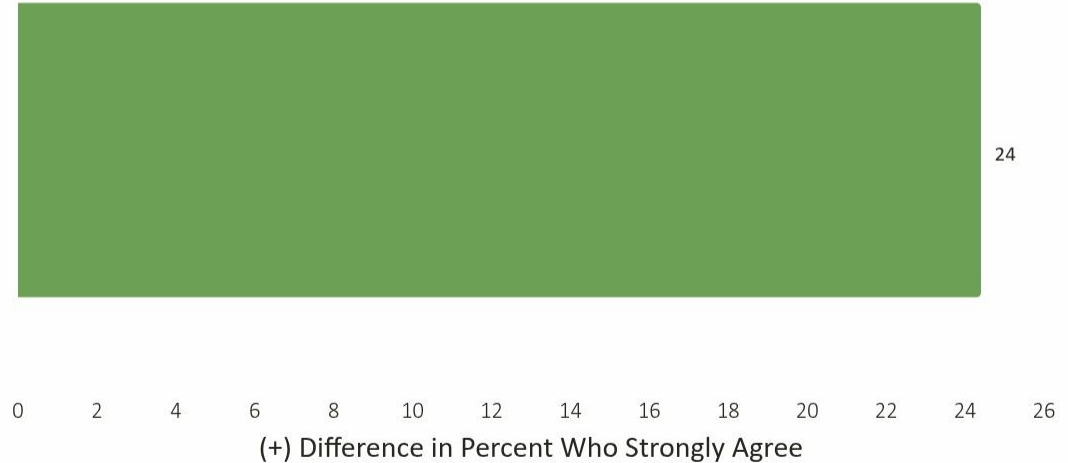
*Tennessee, Georgia, Indiana, Ohio, West Virginia, North Carolina

Kentucky has one top perception strength versus the total competitive set. This perception statement has a 24 point reputational lift versus the total competitive set.

Unique distillery tours

Top **STRENGTH**: Kentucky vs. Total Competitive Set

Unique distillery tours



Kentucky vs. Total Competitive Set

Perception Weaknesses vs **Total Competitive Set**

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

Kentucky's top 5 weaknesses for the perception statements included in this study versus the total competitive set are:

Exciting nightlife/entertainment

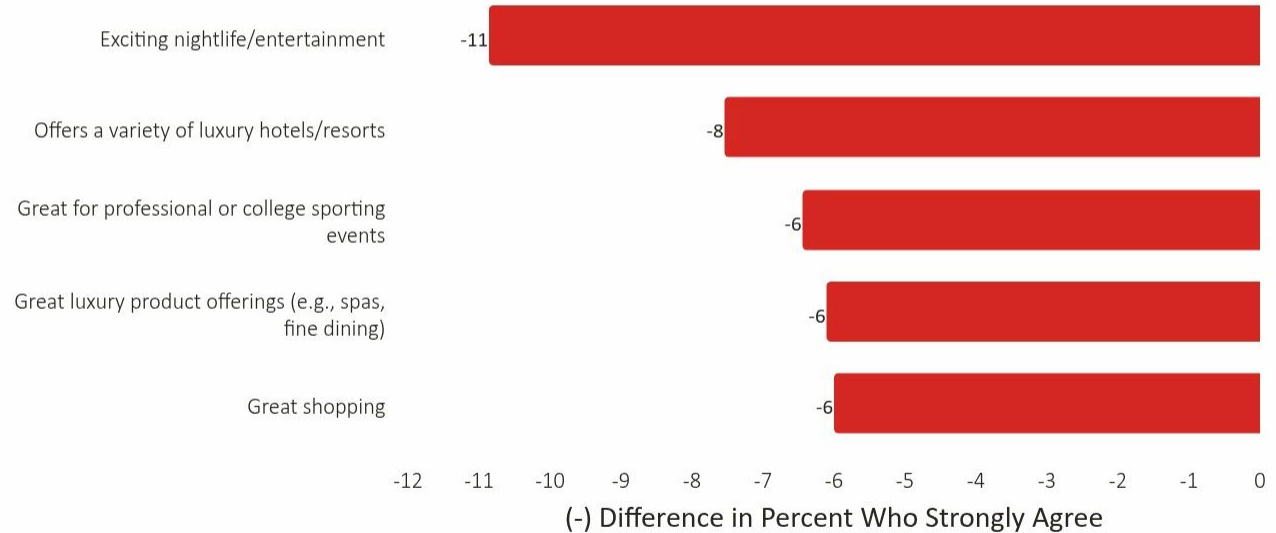
Offers a variety of luxury hotels/resorts

Great for professional or college sporting events

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

Great shopping

Top 5 **WEAKNESSES**: Kentucky vs. Total Competitive Set



Kentucky vs. North Carolina

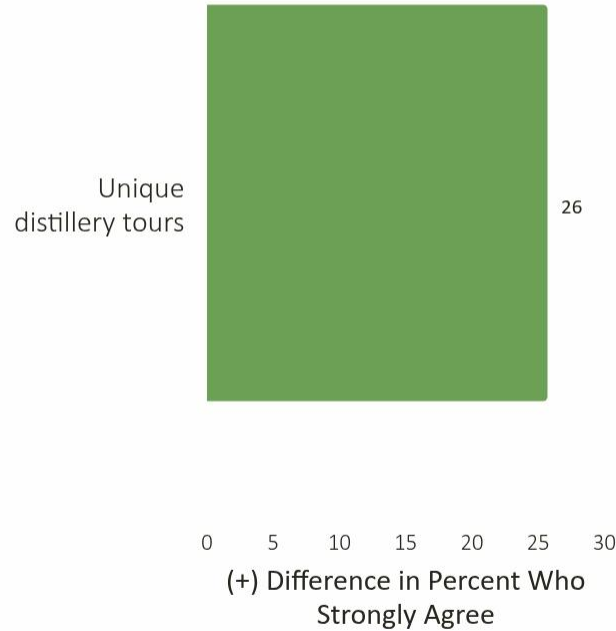
Perception Strengths and Weaknesses

Kentucky's top perception versus North Carolina is unique distillery tours. Of the 3 top perception weaknesses versus North Carolina, one is a Hot Button: **popular with travelers**

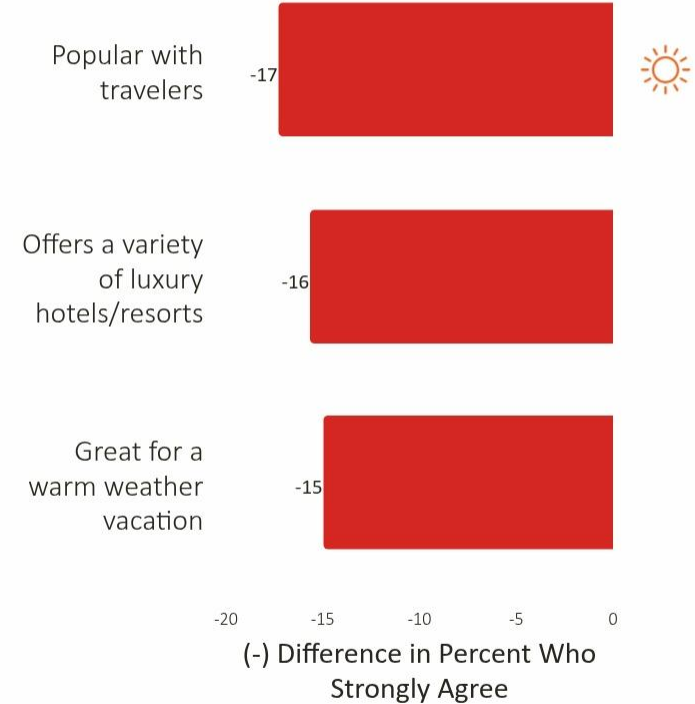


Hot Button

Top 1 Perception **STRENGTH**



Top 3 Perception **WEAKNESSES**



Kentucky vs. Tennessee

Perception **Strengths** and **Weaknesses**

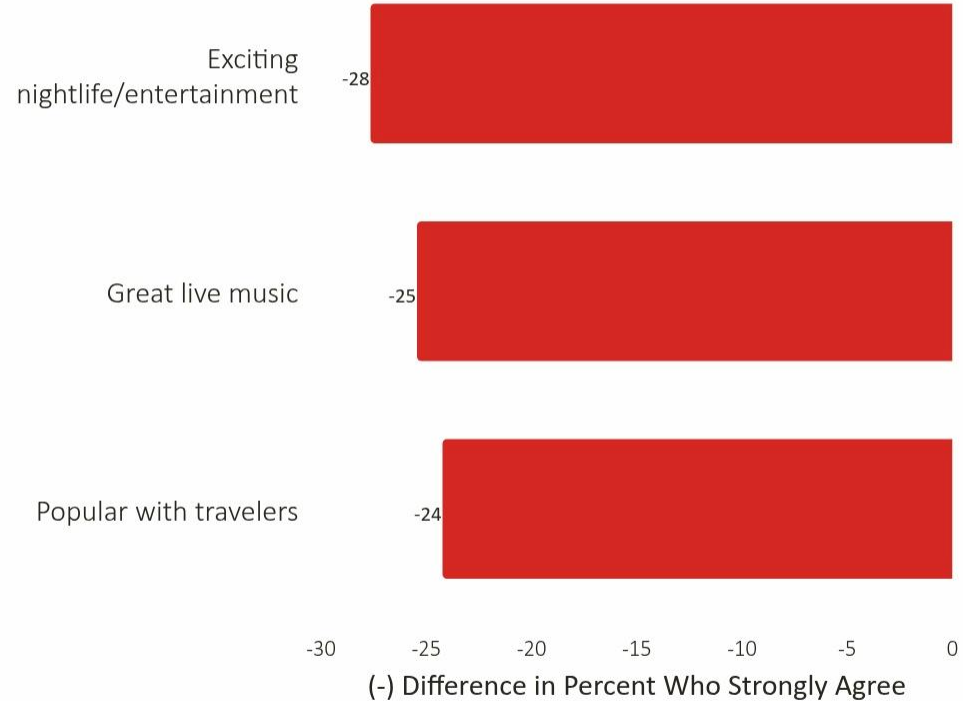
Kentucky has no perception strengths versus Tennessee. Of the top 3 perception weaknesses, one is a Hot Button: **popular with travelers**



Hot Button

No
perception
strengths
for Kentucky
vs
Tennessee

Top 3 Perception **WEAKNESSES**

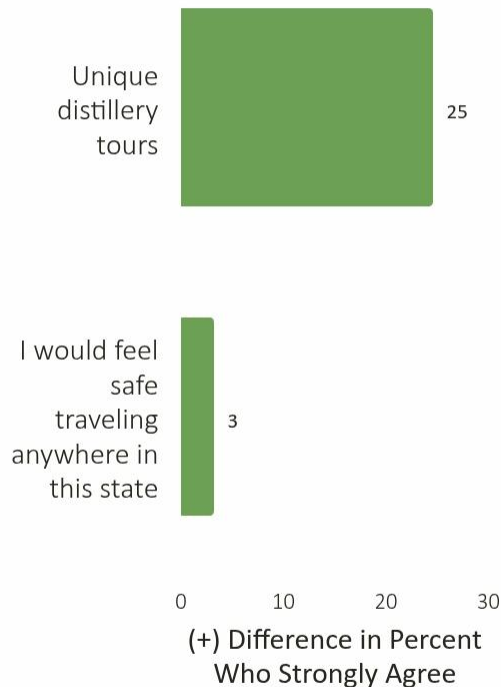


Kentucky vs. Georgia

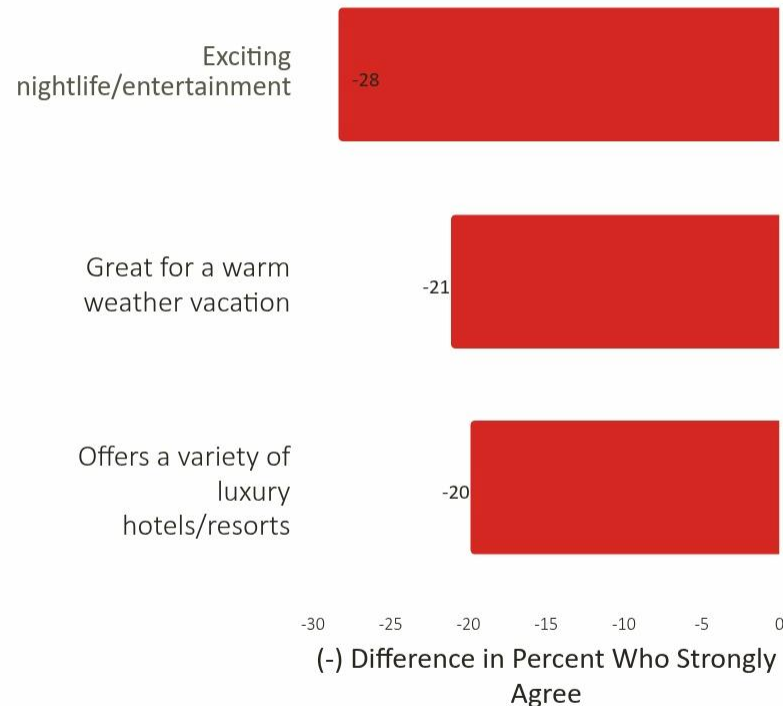
Perception Strengths and Weaknesses

There are 2 perception strengths versus Georgia: unique distillery tours & feeling safe traveling anywhere in the state. Of the top 3 perception weaknesses versus Georgia, there are no Hot Buttons.

Top 2 Perception **STRENGTHS**



Top 3 Perception **WEAKNESSES**

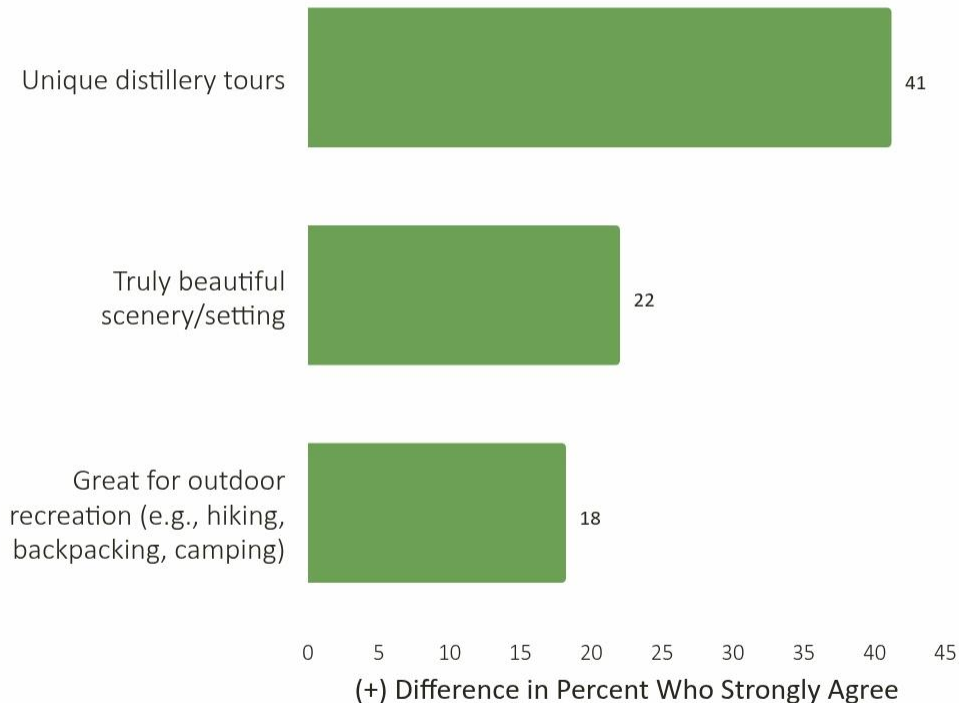


Kentucky vs. Indiana

Perception Strengths and Weaknesses

The top 3 perception strengths versus Indiana are: unique distillery tours, truly beautiful scenery/setting, and great for outdoor recreation. There are no perception weaknesses for Kentucky versus Indiana.

Top 3 Perception **STRENGTHS**



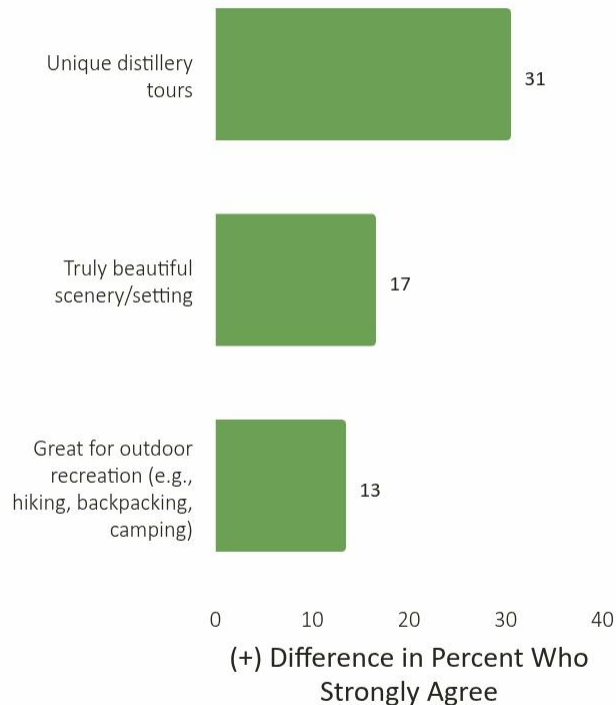
No
perception
weaknesses
for Kentucky
vs Indiana

Kentucky vs. Ohio

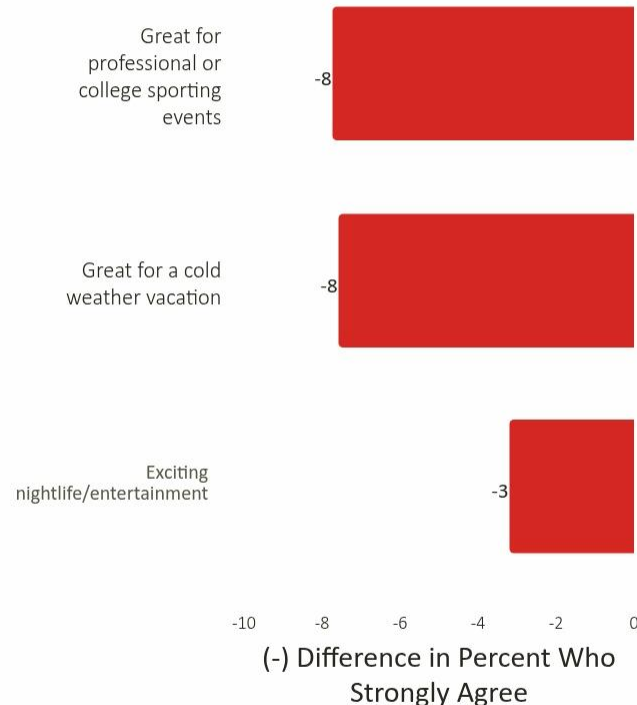
Perception Strengths and Weaknesses

The top 3 perception strengths versus Ohio are: unique distillery tours, truly beautiful scenery/setting, and great for outdoor recreation. Of the top 3 perception weaknesses versus Ohio, there are no Hot Buttons.

Top 3 Perception **STRENGTHS**



Top 3 Perception **WEAKNESSES**

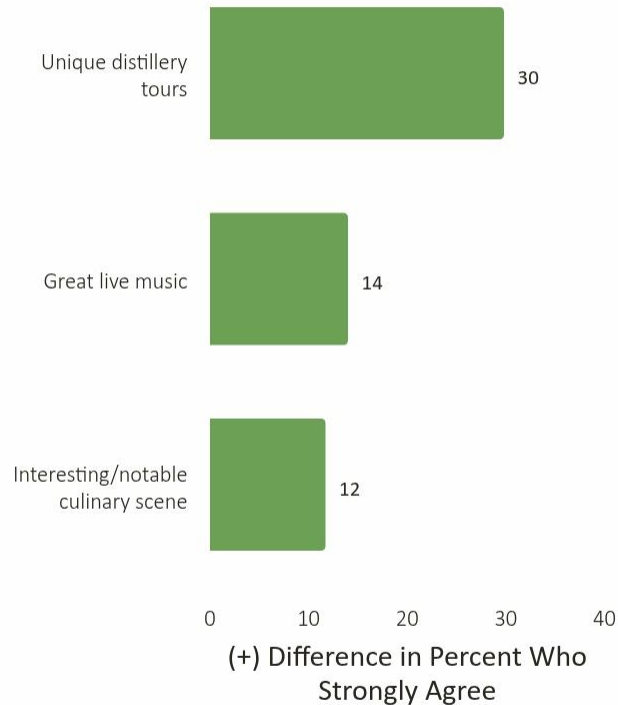


Kentucky vs. West Virginia

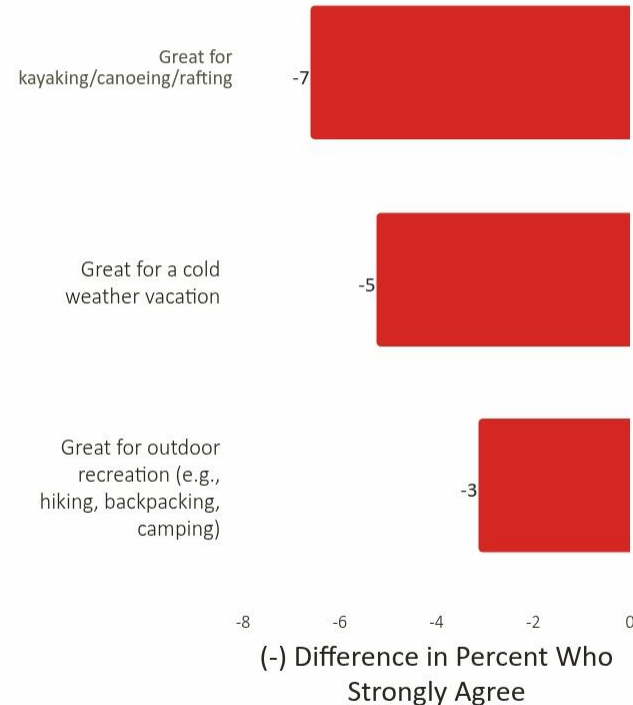
Perception Strengths and Weaknesses

The top 3 perception strengths versus West Virginia are: unique distillery tours, great live music, and interesting/notable culinary scene. Of the top 3 perception weaknesses versus West Virginia, there are no Hot Buttons.

Top 3 Perception **STRENGTHS**



Top 3 Perception **WEAKNESSES**





Halo Effect



Halo Effect: Overview

A Closer Look at the Impact of Awareness and Visitation on Economic Development Indicators



The "Halo Effect"

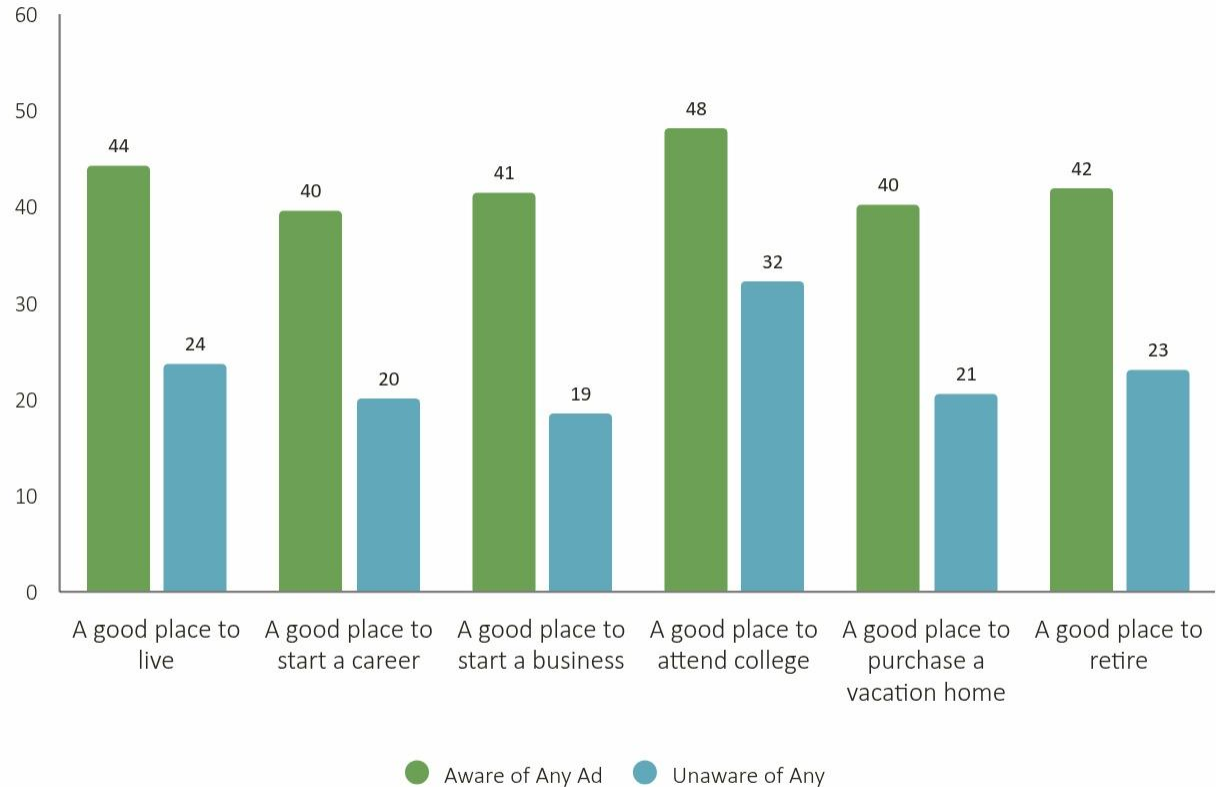
Research has long demonstrated that tourism advertising and the visitation it inspires have a **positive impact on consumers' perceptions** of destinations as a place for leisure travel and recreation.

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

Tourism marketing significantly enhanced travelers' perceptions of Kentucky, improving all six measured economic development attributes by at least 16 points each.

Percent Who Strongly Agree Kentucky Is...

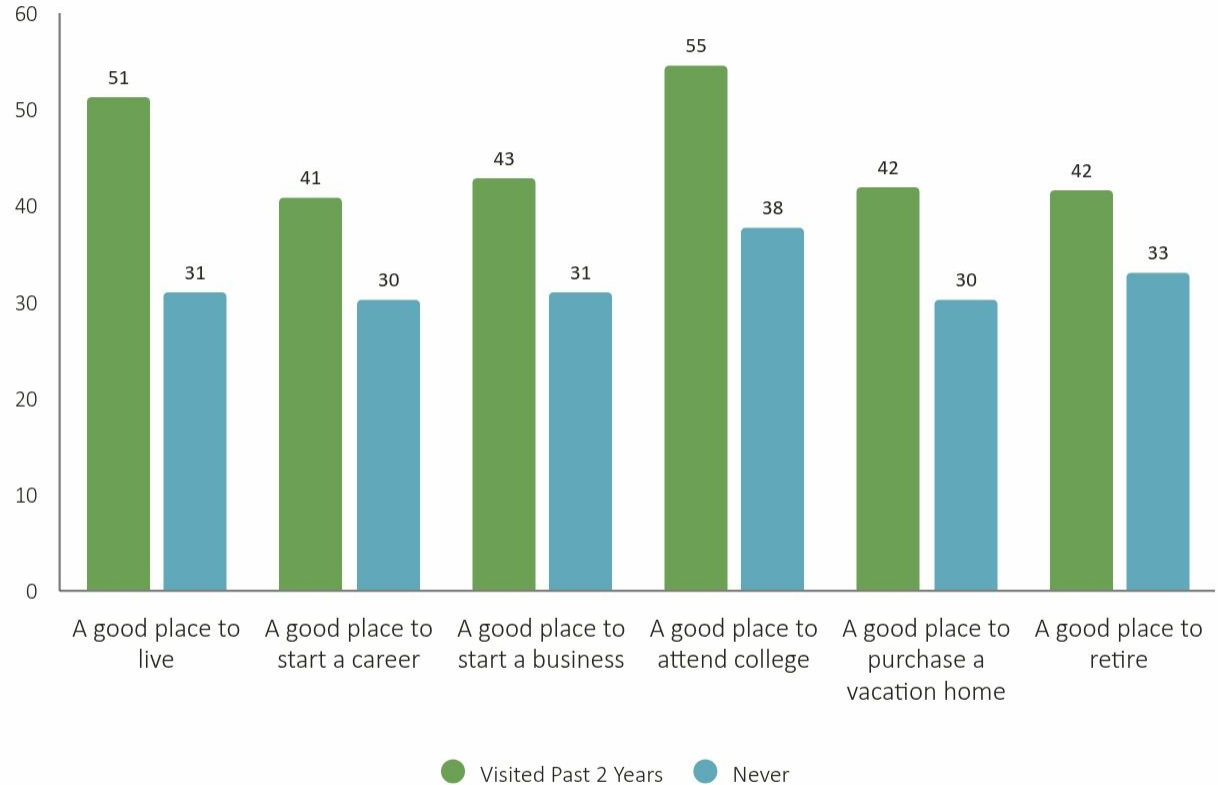


Base: Total Markets excluding Kentucky

Impact of Visitation on Economic Development

Recent visitation to Kentucky improved travelers' perceptions of all six studied economic development attributes by at least 9 points each.

Percent Who Strongly Agree Kentucky Is...

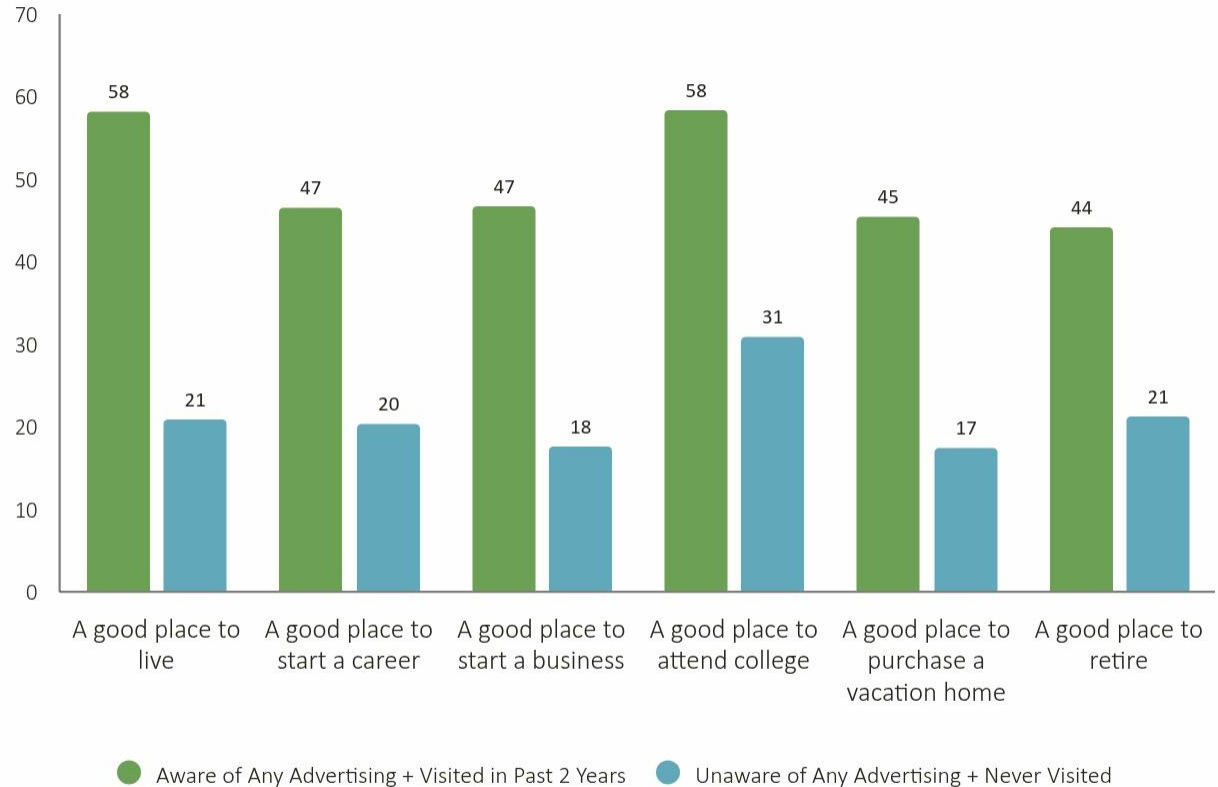


Base: Total Markets excluding Kentucky

Impact of Tourism Ad Awareness and Visitation on Economic Development

Kentucky Tourism's marketing and resulting visitation significantly improved travelers' perceptions of all six studied economic development attributes, increasing the percentage of respondents who strongly agree by at least 23 points each.

Percent Who Strongly Agree Kentucky Is...



Base: Total Markets excluding Kentucky

An aerial photograph of a dense, lush green forest. A narrow, light-colored dirt road or path winds through the center of the forest, curving from the left towards the right. The trees are tall and closely packed, creating a textured canopy of various shades of green. The lighting suggests a bright day, with some areas of the forest floor appearing slightly brighter than others.

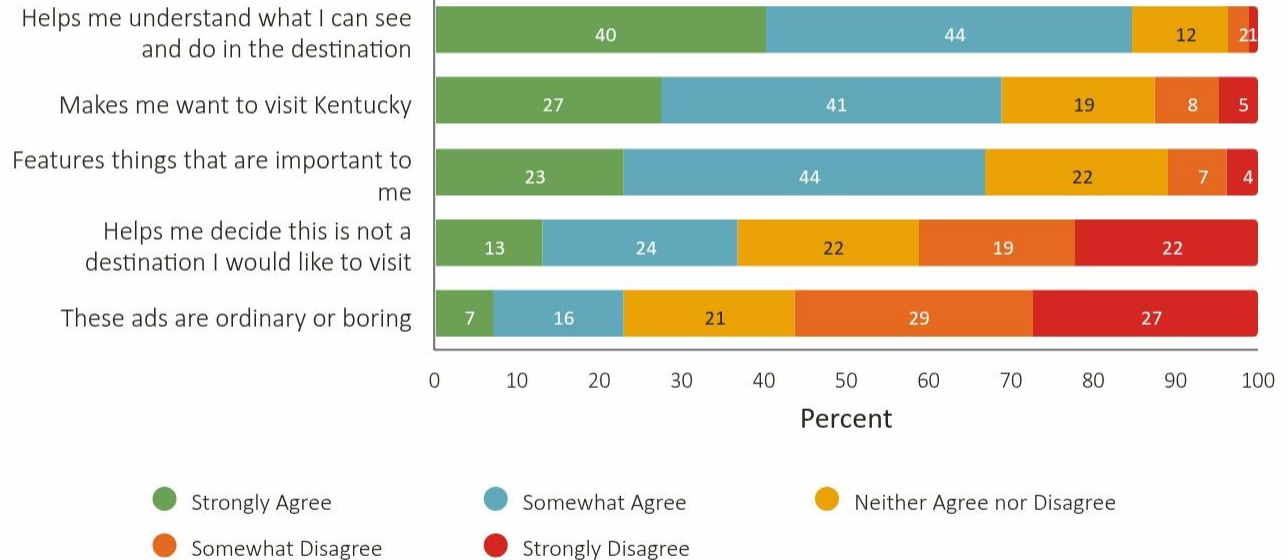
Longwoods
INTERNATIONAL

Media Diagnostics

Media Diagnostics

How much do you **agree** or **disagree** that the **following phrases describe the ads?**

Most respondents say Kentucky Tourism's advertisements clearly showcase the destination (84%), inspired them to visit (68%), and highlighted aspects important to them (67%), while few found the ads unappealing or ordinary.

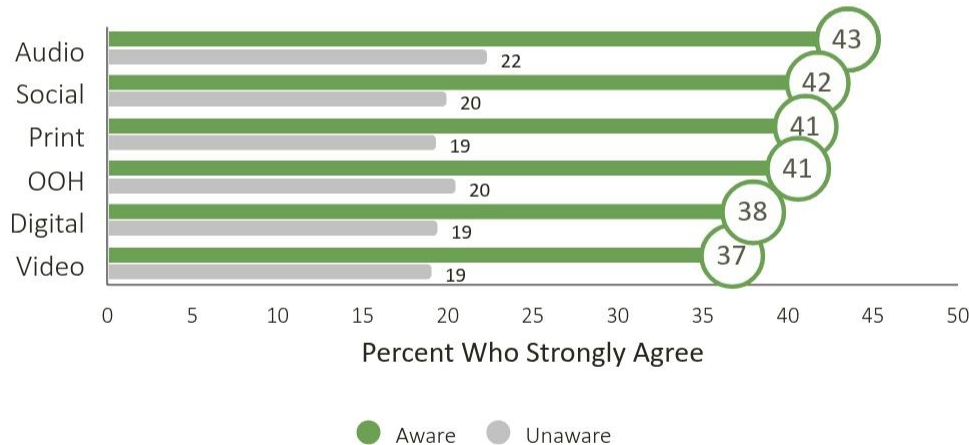


Media Diagnostics

A Closer Look at **Aware** vs **Unaware** of Advertising Impact on **'Makes me want to visit Kentucky'**

Prolonged, cross-channel exposure, especially through social, print & audio ads, produced the strongest positive impact. Video ads had the lowest impact on 'Makes me want to visit Kentucky.'

Percent Who Strongly Agree the Ads **'Makes me want to visit Kentucky'**...



Incremental Lift of Aware vs Unaware of advertising on **'Makes me want to visit Kentucky'**

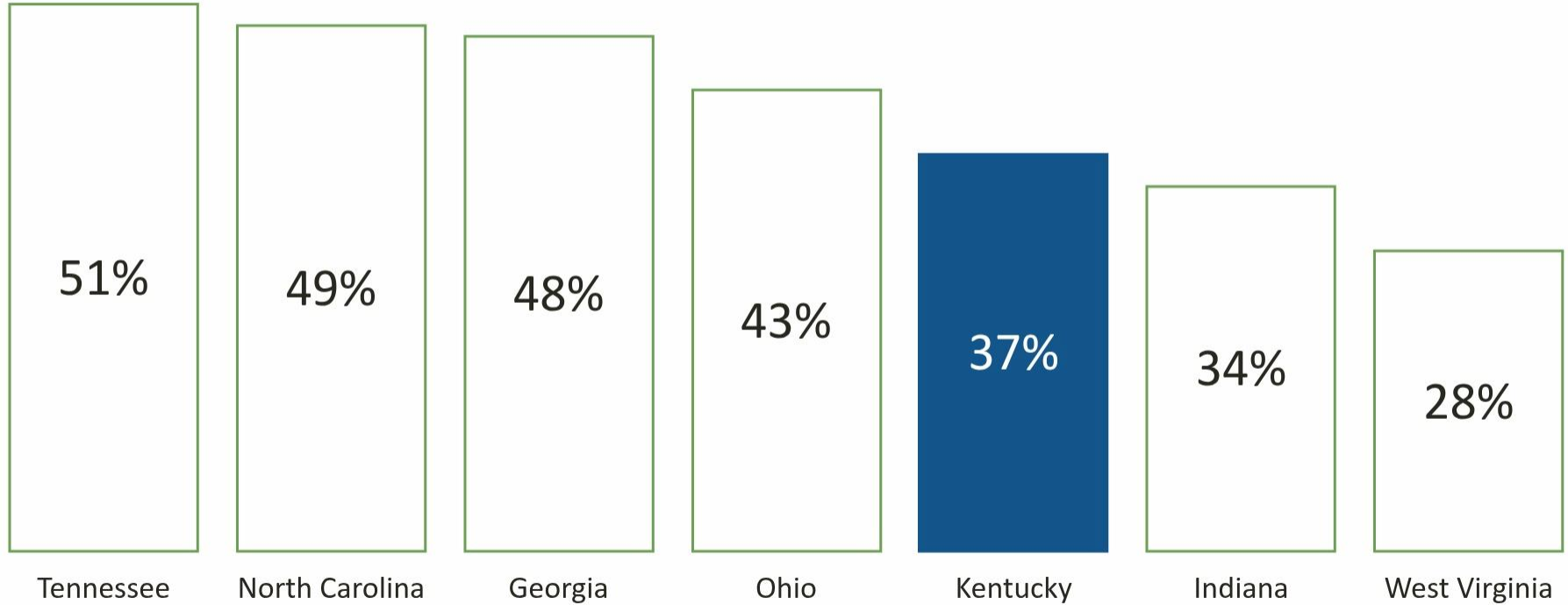
Media Channel	Difference in Percent who Strongly Agree
Social	22
Print	22
Audio	21
OOH	20
Digital	19
Video	18



Destination Visitation & Interest

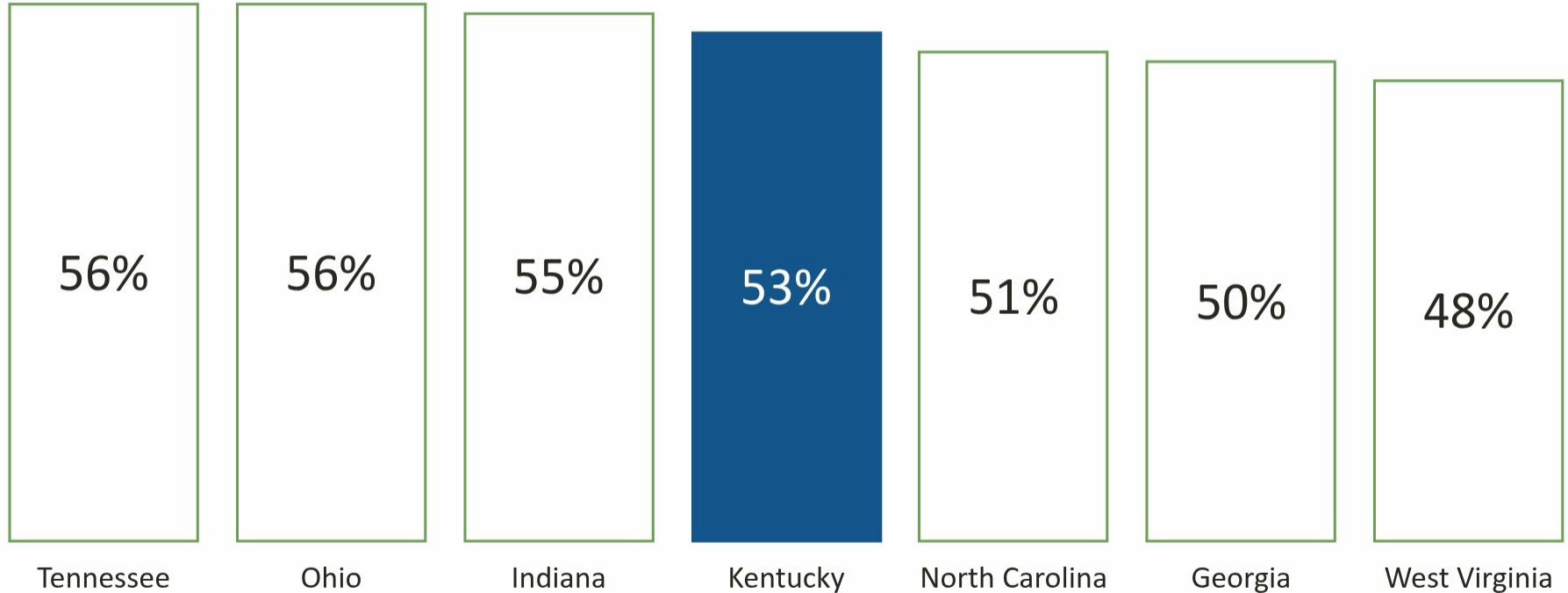
Past Visitation

Ever Visited



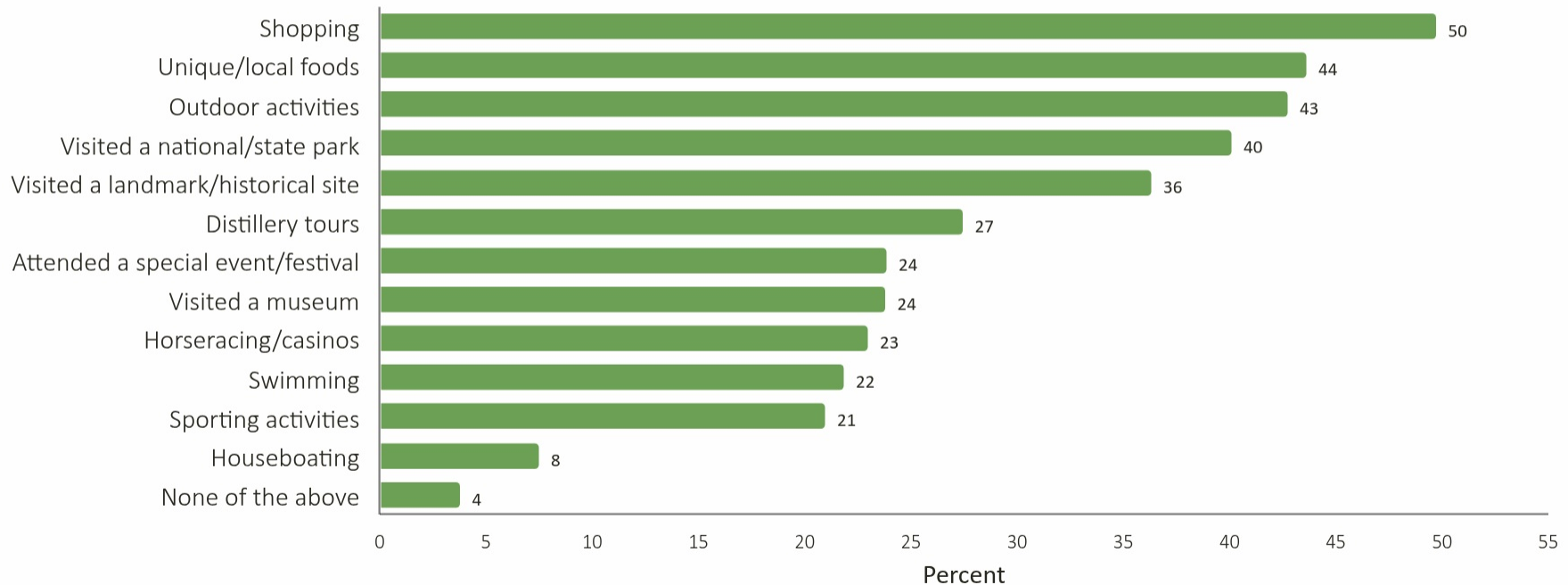
Past Visitation

Visited in the Past 2 Years, among those who have ever visited respective destination



Activities Participated on **Overnight Trip** to **Kentucky**

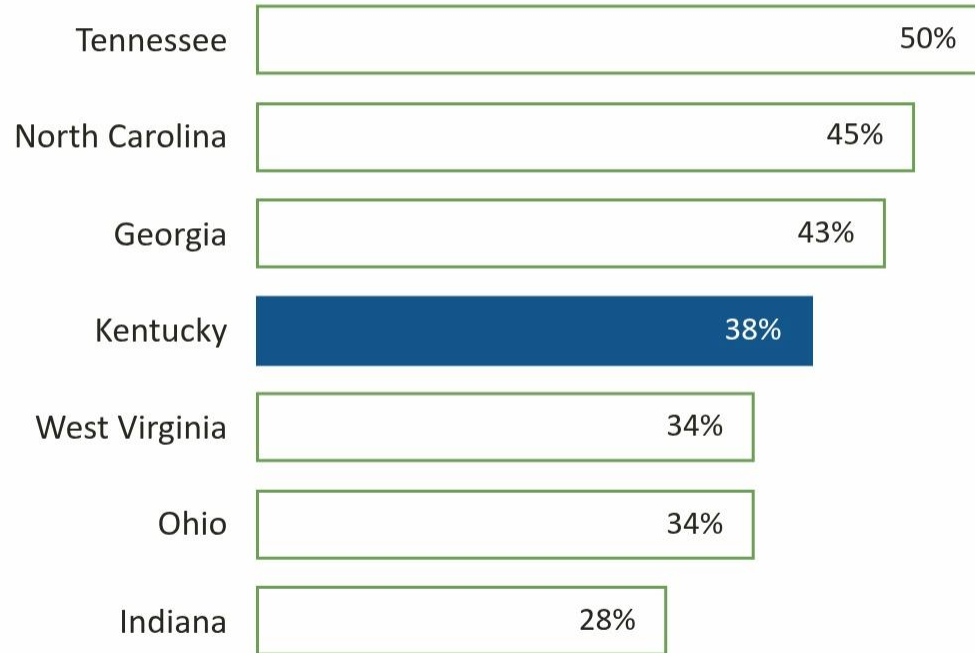
Did you participate in any of the following activities while on your overnight trip(s) to Kentucky?



Intent to Visit in Next 12 Months

Probably or Definitely Will Visit Destination in the Next 12 Months on a Day or Overnight Leisure Trip

Four in ten respondents plan to visit Kentucky within the next year, underperforming intent to visit for Tennessee, North Carolina, & Georgia. However, Kentucky overperformed West Virginia, Ohio, & Indiana.



An aerial photograph of a two-lane highway winding through a dense forest. The trees are in various stages of autumn, with some showing vibrant reds and oranges, while others are still green. A single car is visible on the road, moving away from the viewer. The overall scene is serene and scenic.

Longwoods
INTERNATIONAL

Appendix



Appendix: Individual Ad Summary

Individual Ad Summary

Based on markets where shown. Recalled awareness of individual ads.

Media Type	Advertisement	Percent Aware
Video	Video Spring 30s	34
Video	Video Fall Dynamos	32
Video	Video Fall 30s	31
Video	Video Fall Thrivers	30
Social	Cleveland Regional*	29
Video	Video Fall Connoisseurs	28
OOH	OOH Digital Spring Compilation	28
OOH	OOH Baltimore_NYC_Charlotte	27
Video	Video Fall Magicians	27
Digital	Digital Fall Thrivers Compilation	26
Print	Print Spring Compilation 2	26
Digital	Digital Spring Connoisseurs Compilation	25

Media Type	Advertisement	Percent Aware
Social	Atlanta Regional*	25
Audio	Audio Fall/Spring 30s	25
Social	Dayton Regional*	24
Digital	Digital Spring Native Compilation	24
Digital	Digital Fall Native Compilation	24
Digital	Digital Spring Aspirers Compilation	24
Print	Print Spring Compilation 1	24
OOH	OOH Fall Compilation	23
Digital	Digital Spring Thrivers Compilation	23
Digital	Digital Fall Connoisseurs Compilation	23
Social	Evansville & St Louis Regional*	23

*Caution: Low Sample

Individual Ad Summary (Cont'd)

Based on markets where shown. Recalled awareness of individual ads.

Media Type	Advertisement	Percent Aware
Social	Social Fall Compilation 1	23
Print	Print Fall Better Homes & Gardens	22
OOH	OOH Spring Compilation	22
Digital	Digital Fall Dynamos Compilation	22
Social	Social Spring Compilation 2	22
Social	Social Fall Compilation 2	22
Social	Social Spring Compilation 1	21
Digital	Digital Fall Magicians Compilation	21
Digital	Digital Spring Magicians Compilation	20

Media Type	Advertisement	Percent Aware
Print	Print Fall Compilation	20
Print	Print Fall Saint Louis*	20
Social	Cincinnati Regional*	19
Social	Chicago Regional*	19
Social	Nashville Regional*	18
Social	Knoxville Regional*	18
OOH	OOH Digital Spring Danville Regional	17
Social	Columbus Regional*	15
Social	Indianapolis Regional*	8

*Caution: Low Sample



Appendix: Total Markets Destination Perceptions

Overall Perception Ratings for Kentucky

Percent Who Strongly Agree

Perception Statement/Attribute	% Who Strongly Agree
Unique distillery tours	61
Truly beautiful scenery/setting	54
Great for outdoor recreation (e.g., hiking, backpacking, camping)	53
Interesting cities/small towns	50
Not too far away or expensive to consider for a vacation	49
Warm, friendly people	49
Excellent national/state park facilities/conservation areas	49
A place I would feel welcome	49
Beautiful gardens and parks	48
Good for an adult vacation	48
Good place to relax/escape from hectic life	47

Perception Statement/Attribute	% Who Strongly Agree
Affordable accommodations and dining options	47
Great for professional or college sporting events	47
Interesting festivals/fairs/events	46
Great place for walking/strolling about	46
Great for sightseeing	46
Getting around the state is easy	45
A good place for families to visit	45
Interesting local people/cultures/customs/traditions	45
Great live music	45
Excellent value for the money	44
Good for couples	44

Orange flagged perceptions are Hot Buttons.

Overall Perception Ratings for Kentucky (Cont'd)

Percent Who Strongly Agree

Perception Statement/Attribute	% Who Strongly Agree
Great for kayaking/canoeing/rafting	43
Is an interesting place	43
Well-known destination	43
Lots to see and do	43
Unique travel experience	43
I would feel safe traveling anywhere in this state	43
A real adventure	42
A fun place	40
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	40
Interesting/notable culinary scene	39
Good vacation packages	39

Perception Statement/Attribute	% Who Strongly Agree
Great for a warm weather vacation	39
Popular with travelers	38
Offers a variety of luxury hotels/resorts	37
Great shopping	36
Must see destination	36
Great climate overall	36
An exciting place	36
Great luxury product offerings (e.g., spas, fine dining)	34
Exciting nightlife/entertainment	32
Great for theatre and the performing arts	31
Great for a cold weather vacation	30
Often notice advertising	27

Orange flagged perceptions are Hot Buttons.

Destination Perceptions: Advertising Impact

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	25
Exciting nightlife/entertainment	21
Offers a variety of luxury hotels/resorts	21
Interesting/notable culinary scene	20
Great luxury product offerings (e.g., spas, fine dining)	20
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	20
Popular with travelers	20
Great shopping	19
An exciting place	19
A real adventure	19
Must see destination	18

Perception Statement/Attribute	Difference in % Who Strongly Agree
A place I would feel welcome	18
Great for kayaking/canoeing/rafting	18
Lots to see and do	18
Great for a cold weather vacation	18
A fun place	18
Is an interesting place	18
Beautiful gardens and parks	17
A good place for families to visit	17
Great for sightseeing	17
Great climate overall	17
Interesting festivals/fairs/events	17

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perceptions: Advertising Impact (Cont'd)

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great live music	17
I would feel safe traveling anywhere in this state	16
Good place to relax/escape from hectic life	16
Well-known destination	16
Warm, friendly people	16
Great for theatre and the performing arts	16
Good for couples	16
Excellent national/state park facilities/conservation areas	16
Interesting cities/small towns	16
Great place for walking/strolling about	15
Good vacation packages	15

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good for an adult vacation	15
Great for a warm weather vacation	15
Excellent value for the money	14
Truly beautiful scenery/setting	14
Great for professional or college sporting events	14
Unique travel experience	14
Great for outdoor recreation (e.g., hiking, backpacking, camping)	14
Not too far away or expensive to consider for a vacation	14
Getting around the state is easy	13
Interesting local people/cultures/customs/traditions	12
Affordable accommodations and dining options	10
Unique distillery tours	6

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perceptions: **Product Delivery**

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Not too far away or expensive to consider for a vacation	26
Unique distillery tours	26
A good place for families to visit	24
Good for an adult vacation	23
A place I would feel welcome	22
Excellent national/state park facilities/conservation areas	21
Great for kayaking/canoeing/rafting	21
Warm, friendly people	21
I would feel safe traveling anywhere in this state	21
An exciting place	21
Truly beautiful scenery/setting	21

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good place to relax/escape from hectic life	20
Well-known destination	19
A fun place	19
Often notice advertising	19
Must see destination	19
Excellent value for the money	18
Getting around the state is easy	18
Is an interesting place	18
Good for couples	18
Great for outdoor recreation (e.g., hiking, backpacking, camping)	18
Lots to see and do	18

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perceptions: Product Delivery (Cont'd)

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for sightseeing	17
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	17
Great for professional or college sporting events	16
Interesting cities/small towns	16
Good vacation packages	16
Interesting local people/cultures/customs/traditions	16
A real adventure	15
Beautiful gardens and parks	15
Interesting festivals/fairs/events	15
Great place for walking/strolling about	14
Great live music	14

Perception Statement/Attribute	Difference in % Who Strongly Agree
Affordable accommodations and dining options	14
Unique travel experience	14
Popular with travelers	13
Great for a warm weather vacation	13
Offers a variety of luxury hotels/resorts	12
Interesting/notable culinary scene	11
Great for theatre and the performing arts	10
Great luxury product offerings (e.g., spas, fine dining)	9
Great climate overall	9
Exciting nightlife/entertainment	9
Great shopping	8
Great for a cold weather vacation	8

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perceptions: Kentucky vs Total Competitive Set

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	24
Great for outdoor recreation (e.g., hiking, backpacking, camping)	2
Affordable accommodations and dining options	2
Not too far away or expensive to consider for a vacation	1
Excellent national/state park facilities/conservation areas	1
Truly beautiful scenery/setting	1
Interesting festivals/fairs/events	1
Warm, friendly people	1
I would feel safe traveling anywhere in this state	1
Excellent value for the money	1
Interesting local people/cultures/customs/traditions	1

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great live music	1
Getting around the state is easy	0
Good place to relax/escape from hectic life	0
A place I would feel welcome	0
Unique travel experience	0
Great for kayaking/canoeing/rafting	0
Interesting/notable culinary scene	0
Great place for walking/strolling about	-1
Beautiful gardens and parks	-1
Interesting cities/small towns	-1
A real adventure	-1

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perceptions: Kentucky vs Total Competitive Set (Cont'd)

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for sightseeing	-2
Good for an adult vacation	-2
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	-3
Often notice advertising	-3
Must see destination	-3
Good for couples	-4
A good place for families to visit	-4
An exciting place	-4
Great climate overall	-4
Is an interesting place	-4
Lots to see and do	-4

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for a cold weather vacation	-4
A fun place	-4
Good vacation packages	-4
Well-known destination	-5
Great for a warm weather vacation	-5
Great for theatre and the performing arts	-6
Popular with travelers	-6
Great shopping	-6
Great luxury product offerings (e.g., spas, fine dining)	-6
Great for professional or college sporting events	-6
Offers a variety of luxury hotels/resorts	-8
Exciting nightlife/entertainment	-11

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs North Carolina

Kentucky vs North Carolina: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	26
Great live music	1
Not too far away or expensive to consider for a vacation	0
Interesting festivals/fairs/events	0
Interesting local people/cultures/customs/traditions	-1
Excellent value for the money	-1
Affordable accommodations and dining options	-1
Getting around the state is easy	-1
Great for a cold weather vacation	-3
Interesting/notable culinary scene	-4
Great for outdoor recreation (e.g., hiking, backpacking, camping)	-5

Perception Statement/Attribute	Difference in % Who Strongly Agree
A real adventure	-5
Great for kayaking/canoeing/rafting	-5
I would feel safe traveling anywhere in this state	-6
Interesting cities/small towns	-6
Warm, friendly people	-6
A place I would feel welcome	-6
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	-6
Excellent national/state park facilities/conservation areas	-7
Great for theatre and the performing arts	-7
Great place for walking/strolling about	-7
Unique travel experience	-7

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs North Carolina (Cont'd)

Kentucky vs North Carolina: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	-8
Good place to relax/escape from hectic life	-8
Great for professional or college sporting events	-8
Beautiful gardens and parks	-9
Great for sightseeing	-9
Must see destination	-9
Truly beautiful scenery/setting	-9
Good for couples	-9
Great shopping	-10
Lots to see and do	-11
Good for an adult vacation	-11

Perception Statement/Attribute	Difference in % Who Strongly Agree
A fun place	-11
Great luxury product offerings (e.g., spas, fine dining)	-11
Exciting nightlife/entertainment	-12
A good place for families to visit	-12
An exciting place	-13
Is an interesting place	-13
Good vacation packages	-13
Well-known destination	-14
Great climate overall	-14
Great for a warm weather vacation	-15
Offers a variety of luxury hotels/resorts	-16
Popular with travelers	-17

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Tennessee

Kentucky vs Tennessee: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	0
Affordable accommodations and dining options	-3
Great for a cold weather vacation	-5
Excellent value for the money	-6
I would feel safe traveling anywhere in this state	-7
Not too far away or expensive to consider for a vacation	-8
Getting around the state is easy	-8
Warm, friendly people	-9
Great for outdoor recreation (e.g., hiking, backpacking, camping)	-10
A place I would feel welcome	-10
Good place to relax/escape from hectic life	-10

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for kayaking/canoeing/rafting	-11
Great for professional or college sporting events	-11
Beautiful gardens and parks	-11
Excellent national/state park facilities/conservation areas	-12
Great climate overall	-12
Truly beautiful scenery/setting	-13
Interesting/notable culinary scene	-13
Great place for walking/strolling about	-14
Interesting festivals/fairs/events	-14
Often notice advertising	-14
Interesting local people/cultures/customs/traditions	-14

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Tennessee (Cont'd)

Kentucky vs Tennessee: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Interesting cities/small towns	-14
A real adventure	-14
Good for an adult vacation	-15
Good for couples	-15
A good place for families to visit	-16
Great for a warm weather vacation	-16
Unique travel experience	-16
Offers a variety of luxury hotels/resorts	-16
Good vacation packages	-16
Great luxury product offerings (e.g., spas, fine dining)	-17
Lots to see and do	-17

Perception Statement/Attribute	Difference in % Who Strongly Agree
An exciting place	-18
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	-18
Great shopping	-18
Great for sightseeing	-18
Great for theatre and the performing arts	-19
Is an interesting place	-19
A fun place	-21
Must see destination	-21
Well-known destination	-22
Popular with travelers	-24
Great live music	-25
Exciting nightlife/entertainment	-28

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Georgia

Kentucky vs Georgia: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	25
I would feel safe traveling anywhere in this state	3
Not too far away or expensive to consider for a vacation	2
Affordable accommodations and dining options	2
Great for kayaking/canoeing/rafting	1
Great for outdoor recreation (e.g., hiking, backpacking, camping)	0
Excellent national/state park facilities/conservation areas	0
Good place to relax/escape from hectic life	-1
Warm, friendly people	-1
Great for a cold weather vacation	-1
Getting around the state is easy	-1

Perception Statement/Attribute	Difference in % Who Strongly Agree
Excellent value for the money	-2
Great place for walking/strolling about	-2
Truly beautiful scenery/setting	-4
A place I would feel welcome	-4
Unique travel experience	-5
Good for couples	-6
Great for sightseeing	-7
Great live music	-7
A good place for families to visit	-7
Beautiful gardens and parks	-7
Interesting festivals/fairs/events	-7

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Georgia (Cont'd)

Kentucky vs Georgia: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Interesting local people/cultures/customs/traditions	-8
A real adventure	-8
Interesting cities/small towns	-9
Often notice advertising	-9
Good vacation packages	-11
Good for an adult vacation	-11
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	-12
Must see destination	-12
Is an interesting place	-13
A fun place	-13
Interesting/notable culinary scene	-13

Perception Statement/Attribute	Difference in % Who Strongly Agree
An exciting place	-14
Lots to see and do	-14
Great for theatre and the performing arts	-15
Great climate overall	-16
Well-known destination	-16
Popular with travelers	-16
Great for professional or college sporting events	-17
Great shopping	-17
Great luxury product offerings (e.g., spas, fine dining)	-17
Offers a variety of luxury hotels/resorts	-20
Great for a warm weather vacation	-21
Exciting nightlife/entertainment	-28

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Indiana

Kentucky vs Indiana: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	41
Truly beautiful scenery/setting	22
Great for outdoor recreation (e.g., hiking, backpacking, camping)	18
Great live music	16
Unique travel experience	15
Excellent national/state park facilities/conservation areas	15
Interesting local people/cultures/customs/traditions	14
Great for sightseeing	14
Interesting festivals/fairs/events	14
Great for kayaking/canoeing/rafting	14
Great for a warm weather vacation	13

Perception Statement/Attribute	Difference in % Who Strongly Agree
A real adventure	13
Is an interesting place	13
Well-known destination	12
Must see destination	12
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	12
Interesting/notable culinary scene	12
Beautiful gardens and parks	12
Popular with travelers	12
Good for an adult vacation	12
Interesting cities/small towns	12
Good place to relax/escape from hectic life	12

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Indiana (Cont'd)

Kentucky vs Indiana: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good vacation packages	11
A fun place	11
Great climate overall	11
Great place for walking/strolling about	10
Warm, friendly people	10
An exciting place	10
Often notice advertising	9
A good place for families to visit	9
A place I would feel welcome	9
Lots to see and do	9
Good for couples	8

Perception Statement/Attribute	Difference in % Who Strongly Agree
Affordable accommodations and dining options	8
Not too far away or expensive to consider for a vacation	7
Excellent value for the money	7
Getting around the state is easy	6
Great luxury product offerings (e.g., spas, fine dining)	6
I would feel safe traveling anywhere in this state	6
Great for theatre and the performing arts	5
Offers a variety of luxury hotels/resorts	5
Great shopping	5
Exciting nightlife/entertainment	5
Great for professional or college sporting events	-2
Great for a cold weather vacation	-3

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Ohio

Kentucky vs Ohio: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	31
Truly beautiful scenery/setting	17
Great for outdoor recreation (e.g., hiking, backpacking, camping)	13
Excellent national/state park facilities/conservation areas	13
Warm, friendly people	11
Great live music	11
Unique travel experience	11
Beautiful gardens and parks	11
Great for sightseeing	10
Interesting local people/cultures/customs/traditions	10
Great for a warm weather vacation	10

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good place to relax/escape from hectic life	10
A real adventure	10
Must see destination	8
Great for kayaking/canoeing/rafting	8
An exciting place	8
Great place for walking/strolling about	8
Good for an adult vacation	7
Popular with travelers	7
Well-known destination	7
Great climate overall	7
A place I would feel welcome	7

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs Ohio (Cont'd)

Kentucky vs Ohio: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Is an interesting place	7
Lots to see and do	7
Interesting festivals/fairs/events	6
A fun place	6
Interesting/notable culinary scene	6
Excellent value for the money	6
Interesting cities/small towns	6
I would feel safe traveling anywhere in this state	5
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	5
Good vacation packages	4
A good place for families to visit	4

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	3
Getting around the state is easy	3
Affordable accommodations and dining options	3
Not too far away or expensive to consider for a vacation	2
Good for couples	2
Great shopping	0
Great luxury product offerings (e.g., spas, fine dining)	0
Offers a variety of luxury hotels/resorts	-1
Great for theatre and the performing arts	-1
Exciting nightlife/entertainment	-3
Great for a cold weather vacation	-8
Great for professional or college sporting events	-8

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs West Virginia

Kentucky vs West Virginia: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	30
Great live music	14
Interesting/notable culinary scene	12
Interesting festivals/fairs/events	11
Great for professional or college sporting events	9
Well-known destination	7
Exciting nightlife/entertainment	6
A place I would feel welcome	6
Popular with travelers	6
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	6
Good for an adult vacation	6

Perception Statement/Attribute	Difference in % Who Strongly Agree
Interesting cities/small towns	6
Not too far away or expensive to consider for a vacation	6
I would feel safe traveling anywhere in this state	5
Great shopping	5
Interesting local people/cultures/customs/traditions	5
Getting around the state is easy	5
A fun place	5
Great luxury product offerings (e.g., spas, fine dining)	5
An exciting place	5
Offers a variety of luxury hotels/resorts	5
Unique travel experience	4

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Destination Perception: Kentucky vs West Virginia (Cont'd)

Kentucky vs West Virginia: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for theatre and the performing arts	4
Great place for walking/strolling about	4
Lots to see and do	4
Must see destination	4
Warm, friendly people	4
Beautiful gardens and parks	3
Affordable accommodations and dining options	3
Great for a warm weather vacation	2
Good for couples	2
A good place for families to visit	2
Excellent value for the money	2

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good place to relax/escape from hectic life	1
Is an interesting place	1
Great climate overall	1
Good vacation packages	1
Often notice advertising	0
Excellent national/state park facilities/conservation areas	0
Great for sightseeing	0
A real adventure	-2
Truly beautiful scenery/setting	-3
Great for outdoor recreation (e.g., hiking, backpacking, camping)	-3
Great for a cold weather vacation	-5
Great for kayaking/canoeing/rafting	-7

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.



Appendix: *Existing Markets Brand Health and Halo*

Halo Effect Existing Markets

Ad Impact, Product Delivery, and Awareness + Visitation

	Aware of Any Ad	Unaware of Any Ad	Visited Past 2 Years	Never Visited	Aware + Visited in Past 2 Years	Unaware + Never Visited
A good place to live	46	28	44	35	51	27
A good place to start a career	39	22	38	31	45	23
A good place to start a business	39	21	35	32	40	20
A good place to attend college	50	32	51	38	57	32
A good place to purchase a vacation home	37	21	36	29	38	16
A good place to retire	40	28	39	34	41	27

Hot Buttons Existing Markets

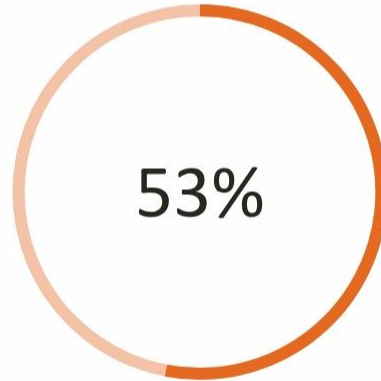
Ad Impact, Product Delivery, and Awareness + Visitation

	Aware of Any Ad	Unaware of Any Ad	Visited Past 2 Years	Never Visited	Aware + Visited in Past 2 Years	Unaware + Never Visited
Must see destination	45	26	46	32	50	19
An exciting place	44	27	44	33	49	22
A fun place	47	32	50	35	54	28
Is an interesting place	49	35	53	37	57	31
Lots to see and do	50	37	51	40	53	29
A real adventure	49	36	52	41	53	30
Good for couples	49	39	54	39	57	35
Popular with travelers	44	28	42	34	47	26
Unique travel experience	45	34	47	36	50	30
Interesting local people/cultures/customs/traditions	49	39	53	40	56	34

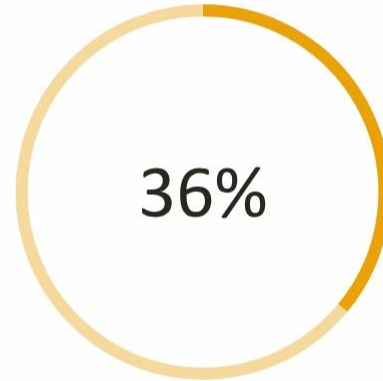
Existing Markets Advertising Impact on Overall Destination Perception

Reputational Lift of Awareness on A Place I'd Really Enjoy Visiting

Percent who strongly agree **Kentucky** is "A place I'd really enjoy visiting"



Aware of Ad Campaign



Unaware of Ad Campaign

Existing Markets Destination Perceptions: Advertising Impact

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	22
Must see destination	19
Offers a variety of luxury hotels/resorts	18
A good place for families to visit	18
Exciting nightlife/entertainment	18
Interesting festivals/fairs/events	18
Warm, friendly people	18
Beautiful gardens and parks	17
An exciting place	17
A place I would feel welcome	16
Popular with travelers	16

Perception Statement/Attribute	Difference in % Who Strongly Agree
Truly beautiful scenery/setting	15
Great for sightseeing	15
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	15
Affordable accommodations and dining options	15
Interesting/notable culinary scene	15
Great live music	15
Great place for walking/strolling about	15
Is an interesting place	14
A fun place	14
Great for a cold weather vacation	14
Great climate overall	14

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Destination Perceptions: Advertising Impact (Cont'd)

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great luxury product offerings (e.g., spas, fine dining)	14
Good for an adult vacation	14
Great for theatre and the performing arts	13
Lots to see and do	13
A real adventure	13
Excellent national/state park facilities/conservation areas	13
Great for professional or college sporting events	13
Good place to relax/escape from hectic life	13
Great for kayaking/canoeing/rafting	13
Well-known destination	13
Excellent value for the money	13

Perception Statement/Attribute	Difference in % Who Strongly Agree
I would feel safe traveling anywhere in this state	12
Getting around the state is easy	12
Interesting cities/small towns	11
Unique travel experience	11
Great shopping	10
Good for couples	10
Great for a warm weather vacation	10
Interesting local people/cultures/customs/traditions	10
Great for outdoor recreation (e.g., hiking, backpacking, camping)	10
Not too far away or expensive to consider for a vacation	9
Unique distillery tours	7
Good vacation packages	6

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Destination Perceptions: Product Delivery

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	23
Truly beautiful scenery/setting	22
Good for an adult vacation	22
Warm, friendly people	19
A good place for families to visit	19
Great for professional or college sporting events	18
Great for kayaking/canoeing/rafting	18
Not too far away or expensive to consider for a vacation	17
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	16
Excellent national/state park facilities/conservation areas	16
Is an interesting place	16

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for outdoor recreation (e.g., hiking, backpacking, camping)	15
A fun place	15
A place I would feel welcome	15
Good for couples	15
Well-known destination	14
Must see destination	14
Excellent value for the money	14
Interesting local people/cultures/customs/traditions	13
Often notice advertising	13
Beautiful gardens and parks	13
I would feel safe traveling anywhere in this state	13

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Destination Perceptions: Product Delivery (Cont'd)

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for sightseeing	13
Good place to relax/escape from hectic life	12
Unique travel experience	12
Lots to see and do	11
An exciting place	11
A real adventure	11
Great place for walking/strolling about	11
Interesting festivals/fairs/events	10
Great live music	10
Getting around the state is easy	9
Popular with travelers	8

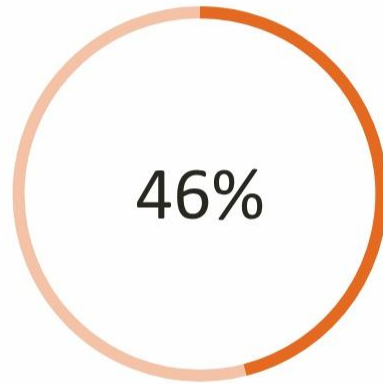
Perception Statement/Attribute	Difference in % Who Strongly Agree
Good vacation packages	8
Affordable accommodations and dining options	8
Interesting/notable culinary scene	7
Interesting cities/small towns	7
Great for theatre and the performing arts	7
Great climate overall	6
Great luxury product offerings (e.g., spas, fine dining)	6
Exciting nightlife/entertainment	5
Offers a variety of luxury hotels/resorts	4
Great for a warm weather vacation	4
Great shopping	2
Great for a cold weather vacation	1

Orange flagged perceptions are Hot Buttons.

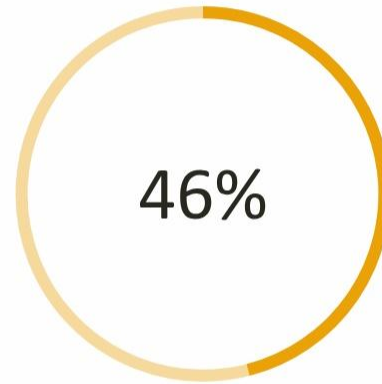
Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Destination Perceptions vs. Competitive Set

Percent Who Strongly Agree Destination is a "A Place I'd Really Enjoy Visiting"



Kentucky

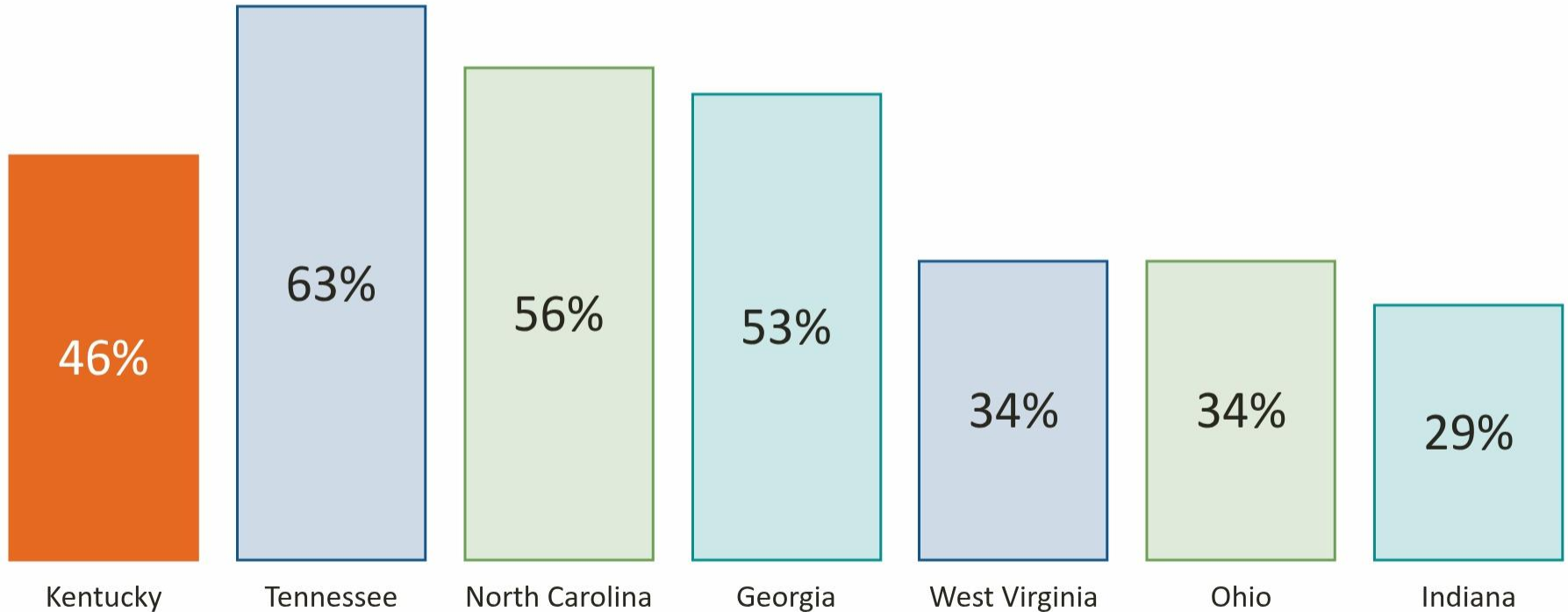


Total Competitive Set*

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

Existing Markets Destination Perceptions vs. Competitive Set

Percent Who Strongly Agree Destination is a "A Place I'd Really Enjoy Visiting"



Existing Markets Brand Health: Perception Groupings

Kentucky vs. Individual Competitors as a Leisure Travel Destination

Perception groupings provide a **macro level** view of how travelers perceive Kentucky and its competitors as a leisure travel destination

Percent Who Strongly Agree Each Destination Is...

	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Worry-Free	50	57	48	39	41	41	54
Sports and Recreation	50	62	52	36	44	45	56
Affordable	49	56	46	40	41	41	48
Unique	48	58	46	26	32	33	42
Adult Appeal	48	63	53	39	44	41	57
Family Atmosphere	47	61	55	38	44	43	58
Sightseeing	47	62	55	32	39	39	56
Exciting	41	58	48	29	33	35	49
Entertainment	40	62	53	31	36	28	44
Popular	38	60	52	25	32	27	49
Luxurious	36	53	54	31	39	25	48
Climate	36	46	48	27	32	32	45

Existing Markets Destination Perceptions: Kentucky vs Total Competitive Set

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	32
Not too far away or expensive to consider for a vacation	7
Affordable accommodations and dining options	6
Excellent value for the money	4
Warm, friendly people	4
Excellent national/state park facilities/conservation areas	4
I would feel safe traveling anywhere in this state	4
Getting around the state is easy	3
Interesting local people/cultures/customs/traditions	3
A place I would feel welcome	3
Great for outdoor recreation (e.g., hiking, backpacking, camping)	2

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good place to relax/escape from hectic life	2
Great live music	2
Interesting festivals/fairs/events	2
Truly beautiful scenery/setting	1
Great for sightseeing	1
Great place for walking/strolling about	1
Interesting cities/small towns	1
A real adventure	1
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	0
Beautiful gardens and parks	0
Great for kayaking/canoeing/rafting	0

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Destination Perceptions: Kentucky vs Total Competitive Set (Cont'd)

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	-1
Good for an adult vacation	-2
An exciting place	-2
Interesting/notable culinary scene	-2
Unique travel experience	-2
Well-known destination	-2
Must see destination	-2
Great climate overall	-3
Good vacation packages	-3
A good place for families to visit	-3
Lots to see and do	-3
Great for a cold weather vacation	-3

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good for couples	-3
Great for a warm weather vacation	-4
Is an interesting place	-4
A fun place	-4
Great for theatre and the performing arts	-5
Offers a variety of luxury hotels/resorts	-6
Great shopping	-6
Great for professional or college sporting events	-6
Great luxury product offerings (e.g., spas, fine dining)	-7
Popular with travelers	-7
Exciting nightlife/entertainment	-12

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

Existing Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Unique distillery tours	67	67	33	22	27	27	32
Not too far away or expensive to consider for a vacation	58	65	45	50	49	46	46
Truly beautiful scenery/setting	55	71	61	32	37	53	67
Great for outdoor recreation (e.g., hiking, backpacking, camping)	54	66	56	32	40	51	62
A place I would feel welcome	52	60	52	43	45	39	57
Excellent national/state park facilities/conservation areas	52	63	48	32	38	47	55
Getting around the state is easy	52	56	50	44	50	37	50
Interesting cities/small towns	51	63	58	38	44	41	54
Warm, friendly people	51	60	50	36	34	45	53
Affordable accommodations and dining options	51	50	46	39	41	42	49
Good place to relax/escape from hectic life	50	59	51	32	38	45	59

Existing Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Good for an adult vacation	50	66	56	40	43	41	59
Great for sightseeing	50	63	55	30	40	44	57
Great place for walking/strolling about	49	62	50	37	40	42	56
Beautiful gardens and parks	48	61	54	34	37	42	59
Great for professional or college sporting events	48	60	60	50	64	32	56
A good place for families to visit	47	61	55	38	44	43	58
I would feel safe traveling anywhere in this state	47	50	38	42	38	40	50
Interesting festivals/fairs/events	47	57	51	37	39	35	51
Great live music	46	72	50	31	35	28	45
Excellent value for the money	46	49	41	37	36	41	45
Good for couples	46	60	51	38	45	42	55

Existing Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Lots to see and do	45	64	57	35	39	36	55
Well-known destination	45	69	59	27	39	30	57
Interesting local people/cultures/customs/traditions	45	57	51	29	34	37	44
A real adventure	45	58	49	30	34	43	48
Great for kayaking/canoeing/rafting	44	60	44	29	34	50	50
Is an interesting place	43	62	54	28	38	40	57
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	42	56	50	26	35	29	48
Good vacation packages	42	58	50	32	37	34	52
A fun place	41	64	51	30	38	33	51
Unique travel experience	41	58	49	25	32	40	52
Great for a warm weather vacation	40	55	62	26	30	34	53

Existing Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Offers a variety of luxury hotels/resorts	40	57	57	34	40	28	52
Popular with travelers	38	63	56	27	33	28	58
An exciting place	38	53	48	26	29	29	50
Interesting/notable culinary scene	38	50	53	28	37	28	40
Must see destination	38	57	45	28	30	34	45
Great shopping	37	55	52	32	40	27	47
Great climate overall	36	49	51	24	26	30	47
Exciting nightlife/entertainment	33	62	61	30	37	28	45
Great for theatre and the performing arts	33	55	48	27	33	22	37
Great luxury product offerings (e.g., spas, fine dining)	32	49	52	29	37	22	43
Great for a cold weather vacation	31	35	32	32	40	31	35
Often notice advertising	31	48	39	21	25	22	32



Appendix: *New Markets Brand Health and Halo*

Halo Effect **New Markets**

Ad Impact, Product Delivery, and Awareness + Visitation

	Aware of Any Ad	Unaware of Any Ad	Visited Past 2 Years	Never Visited	Aware + Visited in Past 2 Years	Unaware + Never Visited
A good place to live	44	21	63	29	68	18
A good place to start a career	40	18	45	30	49	19
A good place to start a business	44	16	54	31	57	16
A good place to attend college	47	32	62	37	63	30
A good place to purchase a vacation home	42	20	51	31	54	18
A good place to retire	44	20	48	33	51	19

Hot Buttons **New Markets**

Ad Impact, Product Delivery, and Awareness + Visitation

	Aware of Any Ad	Unaware of Any Ad	Visited Past 2 Years	Never Visited	Aware + Visited in Past 2 Years	Unaware + Never Visited
Is an interesting place	51	31	60	37	62	26
Must see destination	42	24	58	30	59	19
An exciting place	43	22	65	28	65	18
A fun place	48	27	62	35	64	23
Popular with travelers	47	24	58	34	58	19
Lots to see and do	50	29	66	36	67	24
A real adventure	50	27	59	37	62	25
A good place for families to visit	50	33	67	37	67	28
Good for an adult vacation	52	37	69	41	70	33
Great for sightseeing	51	32	59	38	60	28

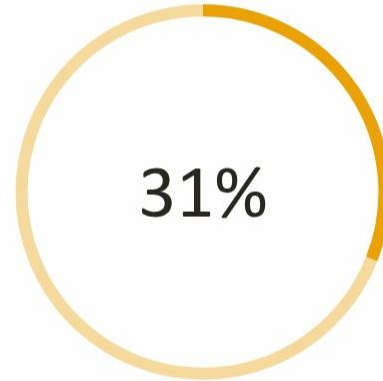
New Markets Advertising Impact on Overall Destination Perception

Reputational Lift of Awareness on A Place I'd Really Enjoy Visiting

Percent who strongly agree **Kentucky** is "A place I'd really enjoy visiting"



Aware of Ad Campaign



Unaware of Ad Campaign

New Markets Destination Perceptions: Advertising Impact

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Often notice advertising	27
Great shopping	26
Great luxury product offerings (e.g., spas, fine dining)	24
Interesting/notable culinary scene	24
Popular with travelers	23
Exciting nightlife/entertainment	23
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	23
A real adventure	23
Great for kayaking/canoeing/rafting	22
Offers a variety of luxury hotels/resorts	22
Lots to see and do	22

Perception Statement/Attribute	Difference in % Who Strongly Agree
Great for a cold weather vacation	21
A fun place	21
Good vacation packages	21
An exciting place	21
A place I would feel welcome	20
Good for couples	20
Is an interesting place	20
Interesting cities/small towns	19
I would feel safe traveling anywhere in this state	19
Well-known destination	19
Great climate overall	19

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Destination Perceptions: Advertising Impact (Cont'd)

Aware of Advertising vs Unaware of Advertising: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Must see destination	19
Good place to relax/escape from hectic life	19
Great for sightseeing	18
Beautiful gardens and parks	18
Excellent national/state park facilities/conservation areas	18
Great live music	18
Great for theatre and the performing arts	17
A good place for families to visit	17
Great for a warm weather vacation	17
Great place for walking/strolling about	17
Interesting festivals/fairs/events	17

Perception Statement/Attribute	Difference in % Who Strongly Agree
Warm, friendly people	16
Not too far away or expensive to consider for a vacation	16
Great for outdoor recreation (e.g., hiking, backpacking, camping)	16
Unique travel experience	16
Great for professional or college sporting events	15
Good for an adult vacation	15
Excellent value for the money	15
Getting around the state is easy	14
Truly beautiful scenery/setting	14
Interesting local people/cultures/customs/traditions	13
Affordable accommodations and dining options	6
Unique distillery tours	6

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Destination Perceptions: Product Delivery

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
An exciting place	37
Not too far away or expensive to consider for a vacation	35
Excellent national/state park facilities/conservation areas	32
I would feel safe traveling anywhere in this state	32
Interesting cities/small towns	31
Good place to relax/escape from hectic life	31
Unique distillery tours	31
Great for kayaking/canoeing/rafting	31
A good place for families to visit	30
Well-known destination	30
Lots to see and do	29

Perception Statement/Attribute	Difference in % Who Strongly Agree
A place I would feel welcome	29
Good for an adult vacation	28
Must see destination	28
A fun place	28
Often notice advertising	27
Excellent value for the money	27
Warm, friendly people	26
Good vacation packages	25
Interesting local people/cultures/customs/traditions	25
Getting around the state is easy	25
Unique travel experience	25

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Destination Perceptions: Product Delivery (Cont'd)

Visited in Past 2 Years vs Never Visited: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good for couples	25
Popular with travelers	25
Great for outdoor recreation (e.g., hiking, backpacking, camping)	24
Truly beautiful scenery/setting	23
Is an interesting place	23
Interesting festivals/fairs/events	23
A real adventure	23
Great for a warm weather vacation	23
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	22
Great live music	22
Interesting/notable culinary scene	22

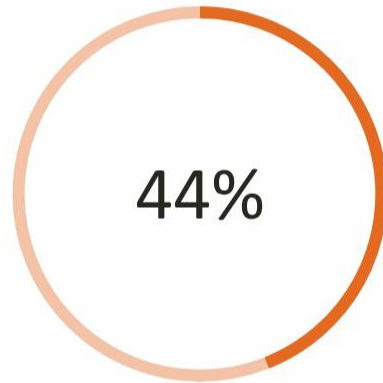
Perception Statement/Attribute	Difference in % Who Strongly Agree
Beautiful gardens and parks	21
Great for sightseeing	21
Great luxury product offerings (e.g., spas, fine dining)	20
Affordable accommodations and dining options	19
Offers a variety of luxury hotels/resorts	19
Great for professional or college sporting events	18
Great for a cold weather vacation	18
Great place for walking/strolling about	18
Great shopping	17
Great for theatre and the performing arts	16
Exciting nightlife/entertainment	15
Great climate overall	14

Orange flagged perceptions are Hot Buttons.

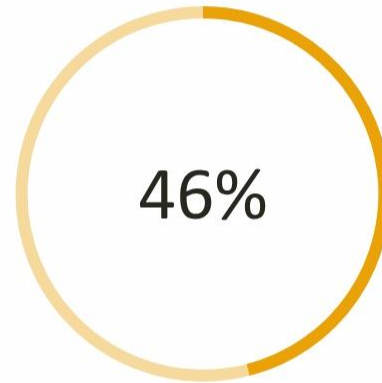
Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Destination Perceptions vs. Competitive Set

Percent Who Strongly Agree Destination is a "A Place I'd Really Enjoy Visiting"



Kentucky

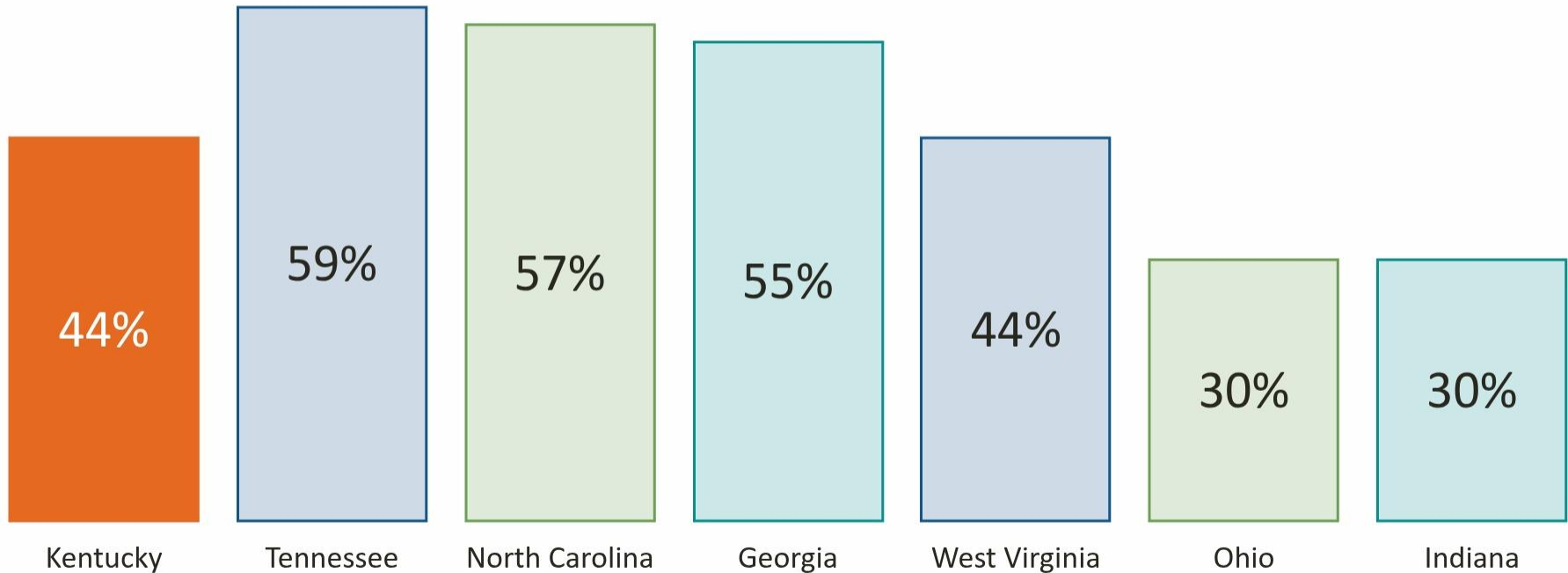


Total Competitive Set*

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

New Markets Destination Perceptions vs. Competitive Set

Percent Who Strongly Agree Destination is a "A Place I'd Really Enjoy Visiting"



New Markets Brand Health: Perception Groupings

Kentucky vs. Individual Competitors as a Leisure Travel Destination

Perception groupings provide a **macro level** view of how travelers perceive Kentucky and its competitors as a leisure travel destination

Percent Who Strongly Agree Each Destination Is...

	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Sports and Recreation	47	56	51	38	40	50	54
Unique	47	58	48	27	34	36	45
Adult Appeal	45	60	54	35	39	43	56
Worry-Free	44	54	47	37	39	43	51
Sightseeing	44	60	54	34	37	44	53
Family Atmosphere	44	61	50	35	40	42	57
Affordable	43	52	48	35	42	43	49
Entertainment	38	59	53	28	35	31	42
Exciting	38	57	51	27	30	36	48
Popular	36	54	49	26	29	35	50
Luxurious	35	52	53	30	34	35	51
Climate	35	46	47	29	32	38	46

New Markets Destination Perceptions: Kentucky vs Total Competitive Set

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Unique distillery tours	20
Great for outdoor recreation (e.g., hiking, backpacking, camping)	2
Truly beautiful scenery/setting	2
Interesting festivals/fairs/events	2
Unique travel experience	1
Interesting/notable culinary scene	0
Interesting local people/cultures/customs/traditions	0
Warm, friendly people	0
Great for kayaking/canoeing/rafting	0
Great live music	0
Excellent national/state park facilities/conservation areas	0

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good place to relax/escape from hectic life	0
I would feel safe traveling anywhere in this state	0
Affordable accommodations and dining options	-1
Beautiful gardens and parks	-1
Excellent value for the money	-1
A place I would feel welcome	-1
Great place for walking/strolling about	-1
Getting around the state is easy	-1
Interesting cities/small towns	-2
Not too far away or expensive to consider for a vacation	-2
A real adventure	-2

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Destination Perceptions: Kentucky vs Total Competitive Set (Cont'd)

Kentucky vs. Total Competitive Set: Difference in Percent Who Strongly Agree

Perception Statement/Attribute	Difference in % Who Strongly Agree
Good for an adult vacation	-3
Good for couples	-3
Must see destination	-4
Great for sightseeing	-4
A good place for families to visit	-4
Often notice advertising	-4
A fun place	-4
Great for a cold weather vacation	-4
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	-4
Is an interesting place	-5
Lots to see and do	-5

Perception Statement/Attribute	Difference in % Who Strongly Agree
An exciting place	-5
Good vacation packages	-5
Popular with travelers	-5
Great climate overall	-5
Great for a warm weather vacation	-5
Well-known destination	-6
Great luxury product offerings (e.g., spas, fine dining)	-6
Great shopping	-6
Great for theatre and the performing arts	-6
Great for professional or college sporting events	-7
Offers a variety of luxury hotels/resorts	-9
Exciting nightlife/entertainment	-10

Orange flagged perceptions are Hot Buttons.

Positive differences are strengths, while negative differences are weaknesses. Margin of error is +/-3.

New Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Unique distillery tours	58	58	38	20	33	34	38
Truly beautiful scenery/setting	54	64	56	32	38	59	60
Great for outdoor recreation (e.g., hiking, backpacking, camping)	52	60	49	36	39	59	54
Interesting cities/small towns	49	64	58	38	43	46	57
Warm, friendly people	48	57	50	41	39	45	59
Beautiful gardens and parks	48	59	56	38	38	47	55
Excellent national/state park facilities/conservation areas	47	58	48	36	34	50	56
Good for an adult vacation	47	61	61	35	39	43	59
Interesting festivals/fairs/events	46	62	55	30	41	36	43
A place I would feel welcome	46	57	53	38	39	45	53
Great for professional or college sporting events	46	57	66	49	49	42	54

New Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Good place to relax/escape from hectic life	46	56	46	38	37	46	53
Interesting local people/cultures/customs/traditions	46	60	54	32	37	42	48
Affordable accommodations and dining options	45	50	45	40	47	46	48
Great place for walking/strolling about	45	58	47	36	38	44	52
Unique travel experience	44	60	47	29	33	38	51
Not too far away or expensive to consider for a vacation	44	53	48	38	47	42	51
A good place for families to visit	44	61	50	35	40	42	57
Excellent value for the money	44	51	48	38	40	44	46
Great live music	44	69	52	29	33	33	43
Great for sightseeing	43	64	51	33	34	47	54
Is an interesting place	43	62	57	32	35	43	57

New Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Great for kayaking/canoeing/rafting	43	50	41	31	37	50	50
Good for couples	43	58	48	35	40	42	52
Well-known destination	42	62	60	34	34	42	57
Lots to see and do	42	57	57	35	34	42	54
A real adventure	42	56	51	30	33	45	49
Getting around the state is easy	41	51	44	36	38	43	44
Interesting/notable culinary scene	40	55	51	28	31	28	45
I would feel safe traveling anywhere in this state	40	49	40	34	38	36	47
Noted for its cultural offerings (e.g., museums, history, landmarks, architecture)	40	60	53	30	36	39	46
A fun place	40	59	54	29	32	36	52
Great for a warm weather vacation	38	55	59	26	30	39	54

New Markets Brand Health Perception Ratings for Kentucky vs Individual Competitors (Cont'd)

Percent Who Strongly Agree Each Destination Is/Has...

Perception Statement/Attribute	Kentucky	Tennessee	Georgia	Indiana	Ohio	West Virginia	North Carolina
Popular with travelers	38	62	53	27	30	34	53
Good vacation packages	38	54	50	26	34	39	53
Great shopping	36	54	54	32	34	34	46
Great climate overall	36	48	52	28	30	37	52
Offers a variety of luxury hotels/resorts	35	51	57	31	36	37	54
Great luxury product offerings (e.g., spas, fine dining)	35	52	50	28	33	33	48
Must see destination	35	58	49	21	27	32	45
An exciting place	35	53	50	26	27	33	47
Exciting nightlife/entertainment	32	59	61	27	35	26	43
Great for theatre and the performing arts	31	47	45	27	32	32	39
Great for a cold weather vacation	29	34	30	33	35	37	32
Often notice advertising	26	39	35	16	24	30	39



Appendix: Glossary

Glossary: Key Terms & Definitions

- **Advertising Awareness**

Awareness is respondents' recalled awareness of ads and is based on markets where shown.

- **Perception Groupings**

Perception Groupings are the aggregated ratings the perception attributes/statements within each grouping.

- **Hot Buttons**

Top perceptions most closely tied to destination selection in sampling markets. Based on strongest correlation value to "A place I'd really enjoy visiting."

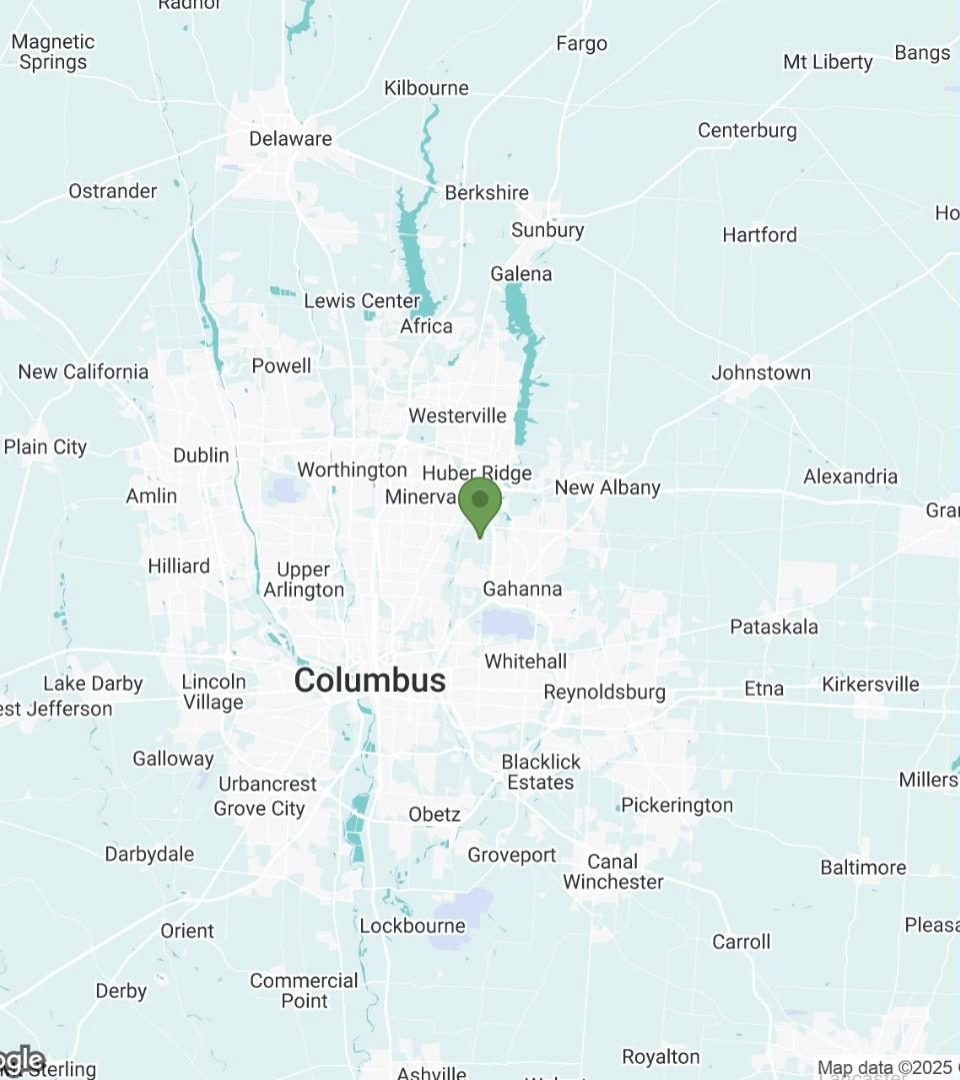
- **Perception Attributes/Statements: Percent Who Strongly Agree**

The percent of respondents giving a perception attribute/statement an agree/disagree rating of 8, 9 or 10 out of 10.

- **Perception Attributes/Statements: Difference in Percent Who Strongly Agree**

(+) Positive differences in % who strongly agree are reputational lifts or strengths

(-) Negative differences in % who strongly agree are reputational gaps or weaknesses



Longwoods
INTERNATIONAL

4030 Easton Station, Suite 300
Columbus, OH
43219



www.longwoods-intl.com