



# Kentucky 2023 Advertising ROI Research

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## ABOUT LONGWOODS INTERNATIONAL

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

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

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

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

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

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

➔ **Custom qualitative and quantitative research.**

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

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



## PROJECT OVERVIEW

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

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

The estimates of the campaign's impacts on visits to Kentucky are conservative in that:  
Trips taken/intended by people in the absence of advertising are backed out.

Conservative control procedures help ensure that only advertising-influenced trips are included.

The campaign consisted of both traditional and online media including:

- Print Ads
- Social Ads
- Digital Ads
- Video Ads
- Radio Ads
- Out-of-Home Ads

Survey fielded in **Existing and New Markets** and received **2,000** qualified respondents.

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

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

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

Fieldwork was conducted in February and March 2024. Median length of survey is 19 minutes. For a sample of this size, **the confidence level is + / -3, 19 times out of 20.**

## Total Markets + Respondent Distribution

**Existing Markets (1,000)**

**New Markets (1,000)**

\*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.

# SAMPLING MARKETS

## Existing Markets + Respondent Distribution

ATLANTA	170
BOWLING GREEN	30
CHARLESTON-HUNTINGTON	30
CHICAGO	220
CINCINNATI	65
COLUMBUS, OH	70
EVANSVILLE	30
INDIANAPOLIS	80
KNOXVILLE	40
LEXINGTON	35
LOUISVILLE	50
NASHVILLE	75
PADUCAH-CAPE GIRARDEAU-HARRISBURG	30
SAINT LOUIS	75

## New Markets + Respondent Distribution

CHAMPAIGN-SPRINGFIELD-DECATUR	40
DALLAS-FORT WORTH	285
DETROIT	175
GRAND RAPIDS-KALAMAZOO-BATTLE CREEK	75
ORLANDO-DAYTONA BEACH-MELBOURNE	165
WASHINGTON, DC (HAGERSTOWN)	260

Please note that the 2023 markets are different from the 2022 markets. Comparisons to 2022 are directional, not direct.

Compared to 2022 Markets, **2023 Existing Markets** excludes Tri-Cities DMA Counties & Detroit, and **2023 New Markets** excludes Dayton and includes Champaign-Springfield-Decatur, Grand Rapids-Kalamazoo-Battle Creek, and Detroit.

## ADVERTISING

- Six in ten (61%) travelers in Kentucky's total advertising markets recalled seeing at least one 2023 Kentucky Department of Tourism (KDT) ad.
  - This is significantly higher than 2022's 56%.
  - Two-thirds (65%) of travelers in Kentucky's existing markets recalled seeing at least one ad, while over half (55%) of travelers in Kentucky's new markets did.
- Among total market travelers, there's only a 16-point difference between the media type with the highest and lowest awareness. Around four in ten total market travelers recalled at least one print (40%), social media (38%), or digital (37%) ad, a third recalled at least one video (32%) ad, and around a quarter recalled at least one radio (28%) or OOH (24%) ad.
  - Comparing this distribution of awareness over media types to the overall awareness, it's clear that travelers are seeing multiple ads across media types. This is the optimal delivery performance, because seeing Kentucky's messaging across media types reaffirms the brand, the state's desirability, and it works to convert travelers' interest into actual visitation.
  - While print and social media ad awareness are significantly higher than in 2022, video awareness is down. The remaining media are significantly the same as 2022.
- Looking at advertising awareness by campaign, those with the highest awareness was the Fall AOR (56%) and Spring AOR (51%).

## ADVERTISING

- The ads with the highest level of recall were:
  - Spring/Fall AOR Radio – 28%
  - Spring AOR 30s Video – 25%
  - Fall AOR 30s Video – 25%
  - Fall AOR Social Compilation 2 – 21%
  - Spring AOR Bourbon Print – 21%
  - Fall AOR OOH Compilation – 20%
- One in ten (11%) were aware of the Kentucky Tourism website, down three points from 2022. Seven in ten (72%) of those travelers found the website very helpful.
- Among travelers in the total advertising markets, a third (34%) conducted an internet search to obtain more information about traveling to Kentucky, and two in ten used social media (20%) or visited [www.KentuckyTourism.com](http://www.KentuckyTourism.com) (19%).
- In the markets included in this study, there were an estimated 438 million recalled ad exposures over the campaign period, 39 million more than achieved in 2022.
  - Digital (124 million exposures) and social ads (102 million exposures) showed highest frequency of recall, followed by print (91 million exposures), video (52 million exposures), OOH (35 million exposures) and radio ads (34 million exposures).



## ADVERTISING

- When we relate the number of ad exposures recalled to the specific amount of money spent on the ads by medium, we see that:
  - The 2023 campaigns had a cost of \$21 per thousand of exposures recalled. This is higher than 2022's \$16, but the same as 2021's \$21.
  - Although this is an increase over 2022, the \$21 per thousand of exposures recalled is still a successful and efficient result.
  - Social media and print ads constituted the most efficient mediums in terms of generating recall per dollar spent, at \$1 and \$6 per thousand of exposures recalled, respectively.
  - Digital (\$11 per thousand of exposures recalled) and radio (\$22 per thousand of exposures recalled) were the second-most effective media.
  - Video (\$79 per thousand of exposures recalled) and OOH (\$65 per thousand exposures recalled each) were the least efficient at generating recall.

## RETURN ON INVESTMENT

- The 2023 campaigns included in this study produced an additional 3.0 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising, 300,000 more incremental trips than in 2022.
  - 2.4 million of those incremental trips were from existing markets, and 0.6 million from new markets.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$451.8 million on those trips, \$66.5 million more than 2022.
  - When related to advertising costs of \$9.2 million, this translates into a return on investment of \$49 in visitor spending for each ad dollar spent.
  - While the spending ROI is down \$11 from 2022, the fact remains that the additional investment of \$2.7 million over 2022 led to an additional \$66.5 million being spent by visitors with partners throughout the state.
  - \$336.2 million of that incremental spending came from existing markets, an increase of \$27.4 million over 2022. When related to advertising costs of \$7.0 million, results in a spending ROI of \$48 for every advertising dollar spent. This is down \$15 from 2022.
  - \$115.6 million of that incremental spending came from new markets, an increase of \$39.1 million. When related to advertising costs of \$2.2 million, results in a spending ROI of \$53 for every advertising dollar spent. This is up \$4 from 2022.
- Looking at total markets, KDT spent \$3.07 for every incremental trip taken, up from 2022's \$2.42.
  - The price per trip in existing markets was \$2.93 and \$3.66 in new markets.

## RETURN ON INVESTMENT

- Those incremental expenditures in the total advertising markets yielded \$33.5 million in state and county taxes. There was a return on investment of \$4 in taxes for each ad dollar spent.
  - While this is lower than 2022's \$5 tax ROI, again, the fact remains that the additional investment of \$2.7 million over 2022 led to an additional \$4.2 million additional taxes being collected at the state and county levels.
  - For existing markets, there was \$24.9 million in incremental state and county taxes, an increase of \$1.4 million from 2022. The tax ROI is \$4, down \$1 from 2022.
  - For new markets, there was \$8.6 million in incremental state and county taxes, an increase of \$2.8 million. The tax ROI of \$4, the same as 2022.

## OVERALL IMAGE

- When travelers from Kentucky's regional advertising markets are deciding to visit the state or one of its regional competitors, the 10 most important individual attributes tied to destination selection are: must-see destination, a fun place, an exciting place, is an interesting place, lots to see and do, good for an adult vacation, interesting cities, good for couples, unique travel experience, and popular with vacationers.
  - There are two changes in the Hot Buttons from 2022 – a real adventure and children would enjoy have been replaced by interesting cities and unique travel experience.
  - Focusing on the year-over-year changes to the 2023 Hot Buttons, Kentucky as a fun place has rebounded to 2021 levels, after falling 5 points in 2022. Similarly, in 2023 popular with travelers regained 3 of the 5 points it lost in 2022. An exciting place is down 3 points from 2021. The remaining Hot Buttons are statistically the same for all three years.
- The 2023 campaign had a strong, positive impact on travelers' perceptions of Kentucky. Travelers in the total markets exposed to the campaign gave the state higher rating scores than those unfamiliar with the campaign across all Travel Motivator categories. For the more detailed attributes, we find that the campaign did an exceptional job improving people's perceptions of Kentucky for almost every image dimension evaluated, including all 10 Hot Buttons.
- Comparing the image ratings of people who have never visited Kentucky versus that of those who have visited in the past two years, we have a measure of "product delivery," the relative satisfaction of the two groups. More travelers who visited the state from the total advertising markets in the past two years gave Kentucky higher rating scores than those who have never visited across all Travel Motivator categories. From this analysis we find that Kentucky had no significant weaknesses in product delivery. More recent Kentucky visitors than non-visitors rated Kentucky more favorably across all 10 Hot Button attributes.

## OVERALL IMAGE

- Relative to the other destinations in the competitive set for this study, Kentucky is fairly competitive against most of the states included in this analysis. Across the markets surveyed, almost half rated Kentucky very favorably as a destination they “would really enjoy visiting.” Kentucky is ahead of Indiana and Ohio, tied with West Virginia, and behind Tennessee, North Carolina, and Georgia.
  - In 2022, 47% strongly agreed Kentucky is a place I’d really enjoy visiting. That is a statistical tie with this year’s result.
  - Kentucky has 3 image attribute strengths when compared to the competitive set, around distilleries and the outdoors.
  - However, there are 7 image attributes where Kentucky lags the competitive set, around urban-associated attributes as well as two Hot Buttons – popular with vacationers and an exciting place.
- In every case, Kentucky’s tourism advertising and subsequent visitation significantly improved the image of Kentucky for a wide range of economic development objectives among out-of-state travelers within Kentucky’s regional markets, including a good place to live, work, retire, and work remotely.

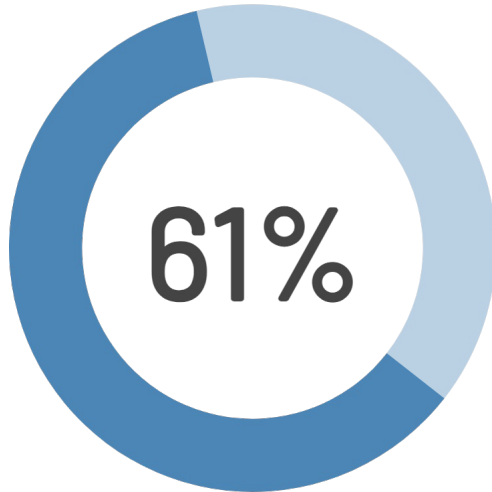


[ADVERTISING AWARENESS]

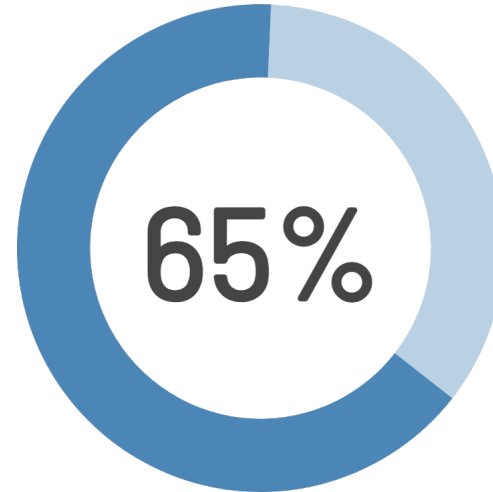
TEAM  KENTUCKY®

# ADVERTISING AWARENESS\* BY MARKET

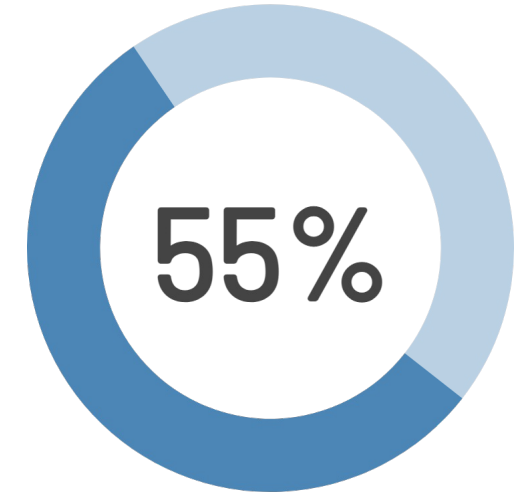
TOTAL MARKETS



EXISTING MARKETS



NEW MARKETS



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

# AWARENESS\* OF THE AD CAMPAIGN

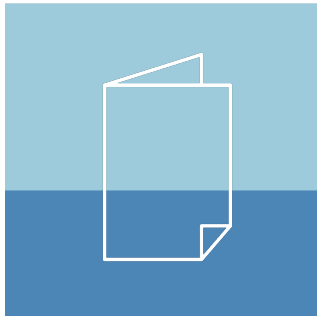
Base: Total Markets

## 61%

Aware of  
Any Ad

2022 Overall Awareness: 56%

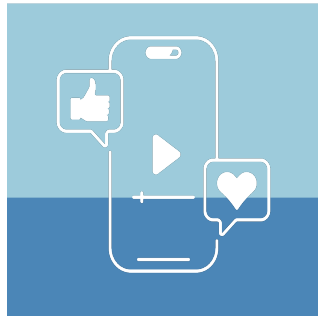
PRINT AD AWARE



40%

2022 Print  
Awareness:  
36%

SOCIAL AD AWARE



38%

2022 Social  
Awareness:  
31%

DIGITAL AD AWARE



37%

2022 Digital  
Awareness:  
36%

VIDEO AD AWARE



32%

2022 Video  
Awareness:  
40%

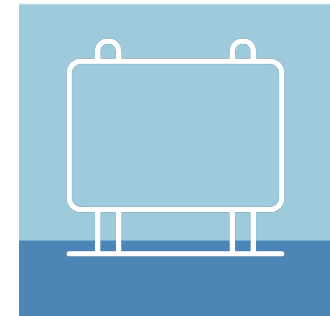
RADIO AD AWARE



28%

2022 Radio  
Awareness:  
30%

OUT-OF-HOME  
AD AWARE



24%

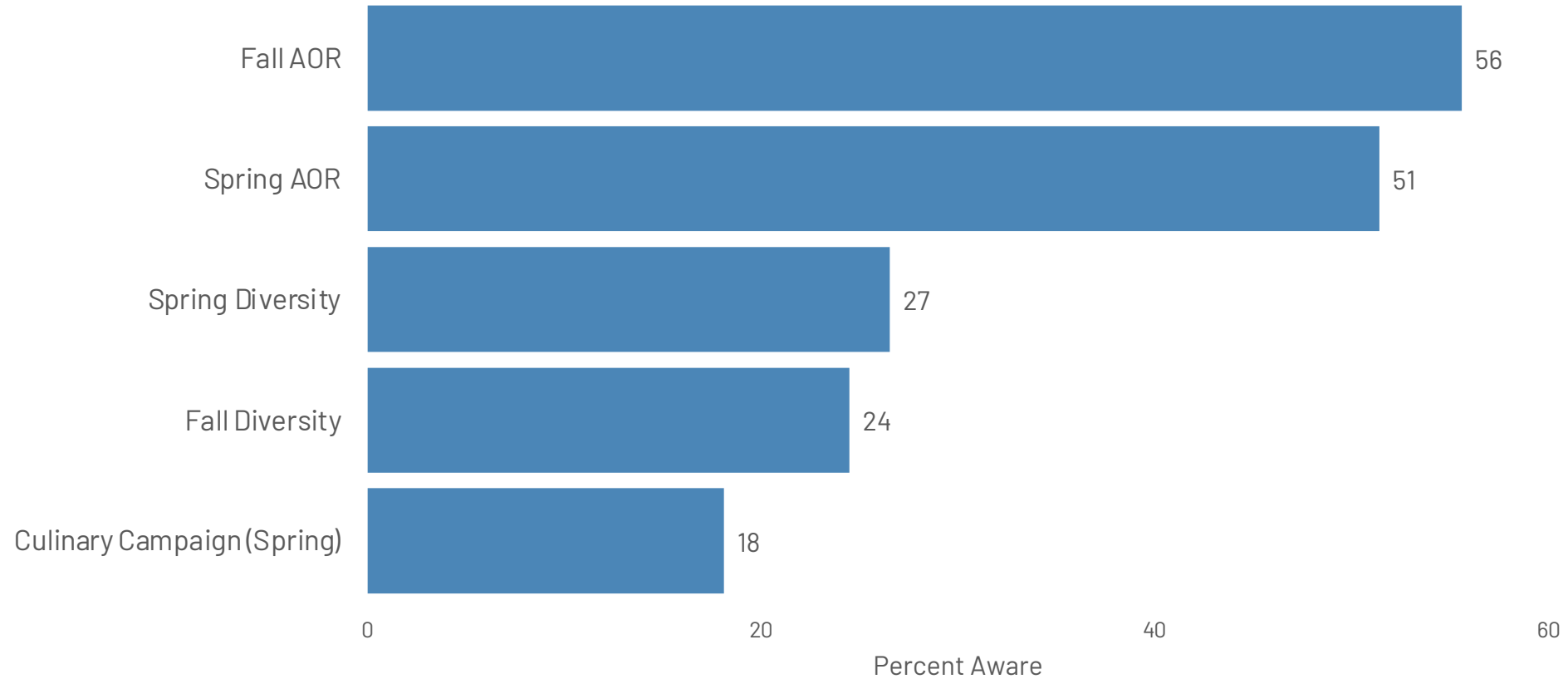
2022 OOH  
Awareness:  
26%

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



# ADVERTISING AWARENESS\* BY CAMPAIGN

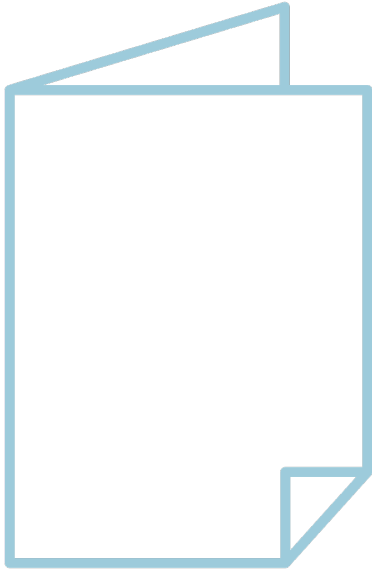
Base: Total Markets



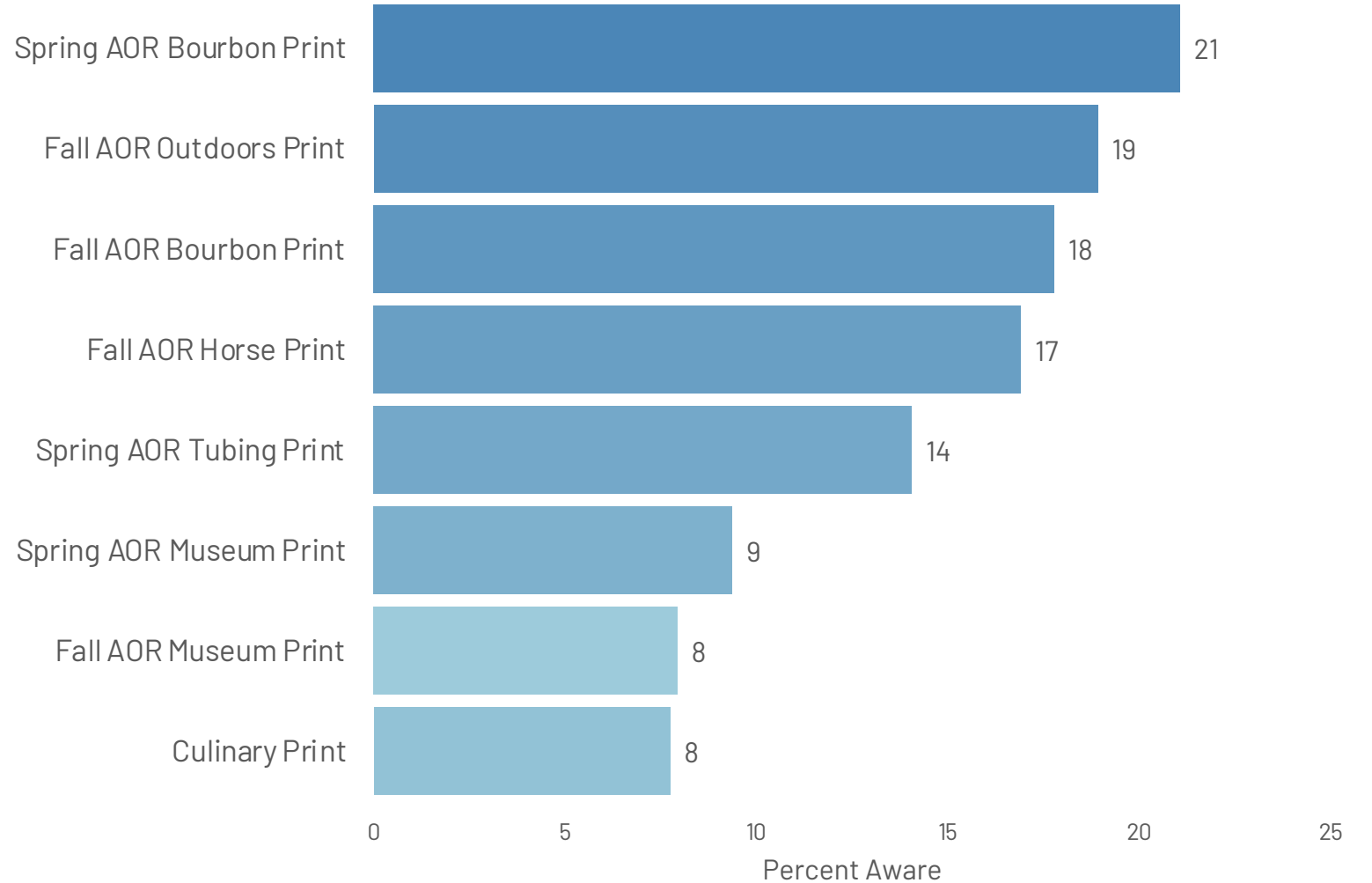
\*Saw at least one ad and based on markets where shown

# AWARENESS\* OF PRINT ADS

Base: Total Markets



Print Ad Awareness  
**40%**

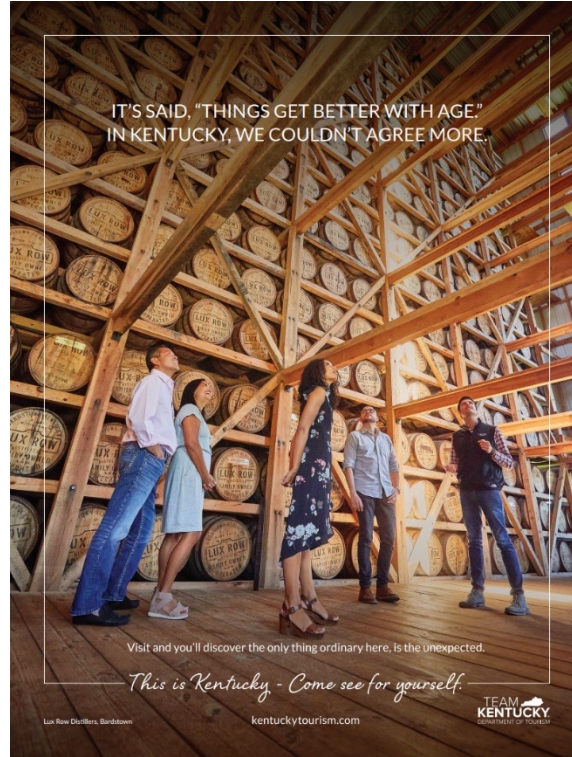


\*Saw at least one ad and based on markets where shown

# PRINT ADVERTISING CREATIVE



Culinary Print



Spring AOR Bourbon Print

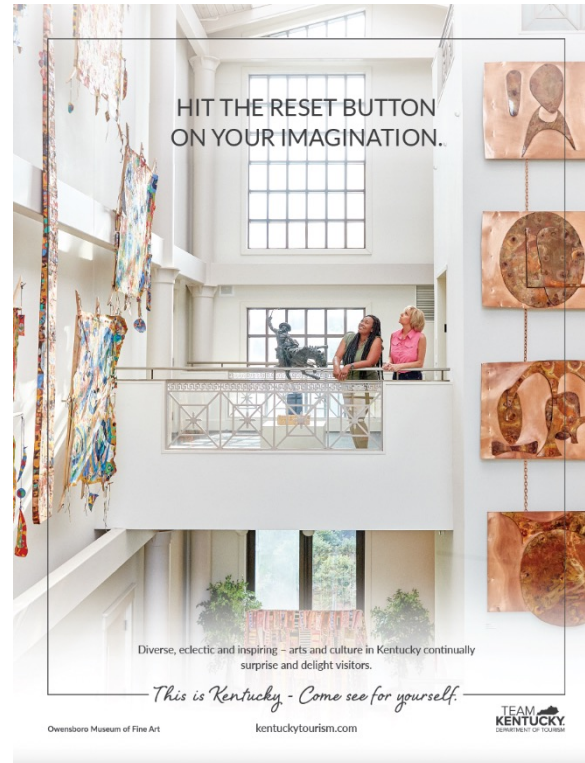


Spring AOR Tubing Print

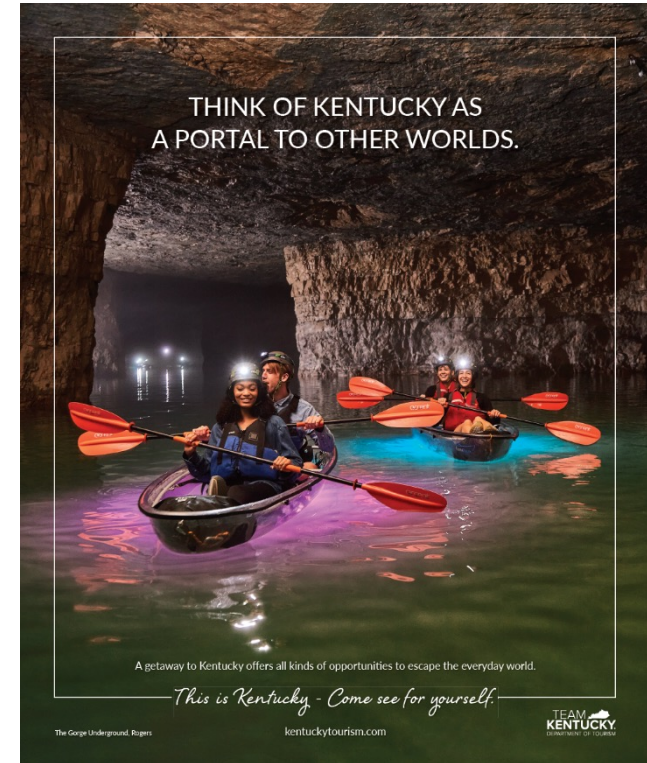
# PRINT ADVERTISING CREATIVE (CONT'D)



Spring AOR Museum Print



Fall AOR Museum Print



Fall AOR Outdoors Print

# PRINT ADVERTISING CREATIVE (CONT'D)

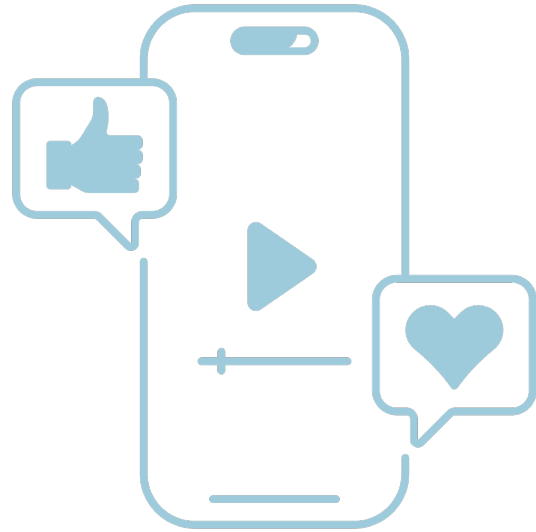


Fall AOR Bourbon Print



Fall AOR Horse Print

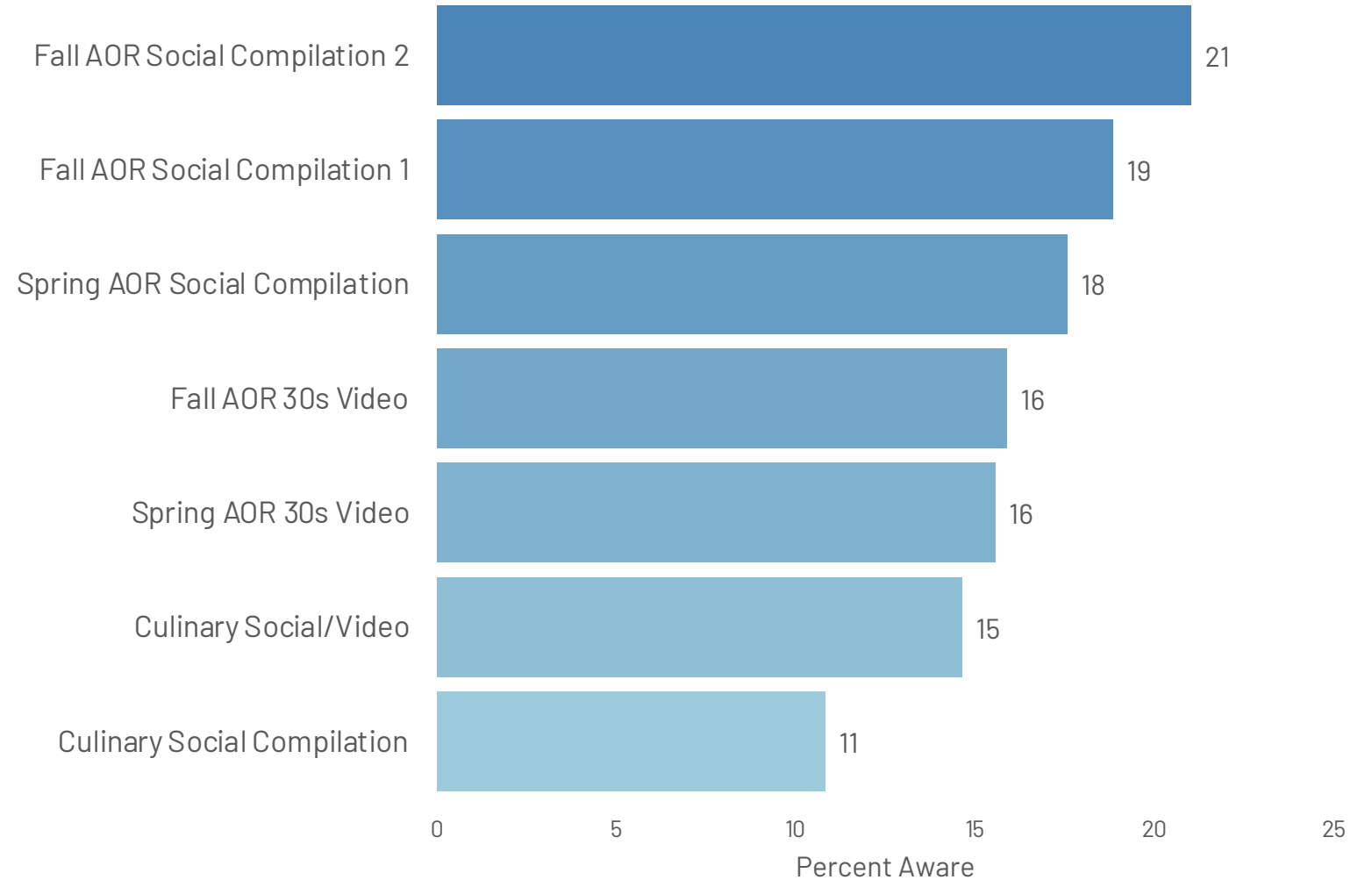
# AWARENESS\* OF SOCIAL ADS



Social Ad  
Awareness

38%

Base: Total Markets



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

# SOCIAL ADVERTISING CREATIVE

**Kentucky Tourism** Sponsored · KY

Kick off a day of exploration with a good meal from Black-owned restaurants and chefs in Kentucky.

kentuckytourism.com  
**Find Black history and food** [Learn more](#)

👍❤️👍 1K 111 comments 182 shares

👍 Like 🗨️ Comment ➦ Share

Culinary Social Compilation

Instagram

kytourism Sponsored

Learn more >

kytourism Kentucky's culinary scene is a melting pot of flavors, with dishes inspired by the state's rich ... more

**Kentucky Tourism** Sponsored · KY

Kentucky is home to some of the most innovative and talented chefs in the country. Each dish is made with heart and ...See more

kentuckytourism.com  
**Where Food Wows** [Learn more](#)

👍❤️👍 111 1 comment 9 shares

👍 Like 🗨️ Comment ➦ Share

Culinary Social/Video

# SOCIAL ADVERTISING CREATIVE (CONT'D)

**KY Kentucky Tourism**  
Sponsored · 🌐

Follow veterinarians into the stables of some of Kentucky's most iconic horse farms to get a behind-the-scenes look at future champions.




**See behind the scenes of horse farms**

👍❤️😄 1.5K    125 comments    161 shares

👍 Like    💬 Comment    ➦ Share

**KY Kentucky Tourism**  
Sponsored · 🌐

Soak up Kentucky's diverse art, history, culture and charm, in cities and towns across the Bluegrass State.




**Explore the state's past.**    [Learn more](#)    **Find ch towns.**

👍❤️😄 674    50 comments    54 shares

👍 Like    💬 Comment    ➦ Share

**KY Kentucky Tourism**  
Sponsored · 🌐

Kentucky's outdoor playground offers fun above ground and below.




**Spend a day on stunning lakes.**    [Learn more](#)    **Explore fascina**

👍❤️😄 1.7K    117 comments    238 shares

👍 Like    💬 Comment    ➦ Share

**KY Kentucky Tourism**  
Sponsored · 🌐

Whether you travel alone or with your crew, Kentucky's outdoors are yours to discover.



[kentuckytourism.com](https://kentuckytourism.com)  
**Discover hidden trails and hideaways.**    [Learn more](#)



Spring AOR Social Compilation



# SOCIAL ADVERTISING CREATIVE (CONT'D)

**Kentucky Tourism** Sponsored · 🌐

Thrill seekers and nature lovers, it's time to embark on an epic outdoor adventure in Kentucky this fall. From biking to ...See more





**Explore KY's Caves** [Learn more](#) **Find Ad in Kent**

👍❤️👎 1.9K 83 comments 192 shares

👍 Like 🗨 Comment ➦ Share

**Kentucky Tourism** Sponsored · 🌐

Relish the grace and beauty of our beloved horses, take leisurely strolls through rolling pastures, and soak in the ...See more



**Discover Horse Country** [Learn more](#) **Find Yo Nature**

👍❤️👎 587 39 comments 32 shares

👍 Like 🗨 Comment ➦ Share

**Kentucky Tourism** Sponsored · 🌐

Embark on a breathtaking underground journey and explore the hidden wonders of Kentucky's caves. From stunning rock ...See more



kentuckytourism.com  
**Explore Kentucky above ground and below.** [Learn more](#)

👍❤️👎 557 84 comments 85 shares

👍 Like 🗨 Comment ➦ Share

**Kentucky Tourism** Sponsored · 🌐

Kentucky's rolling hills and picturesque distilleries create the perfect backdrop for your bourbon adventure. Immerse ...See more




kentuckytourism.com  
**Discover Kentucky Bourbon** [Learn more](#)

👍❤️👎 607 77 comments 32 shares

👍 Like 🗨 Comment ➦ Share

Instagram

kytourism Sponsored



[Learn more](#) ➦

👍❤️🗨👎

kytourism Discover the magic of horseback riding amidst Kentucky's beautiful landscapes and cr... more

Fall AOR Social Compilation 1

Fall AOR Social Compilation 2

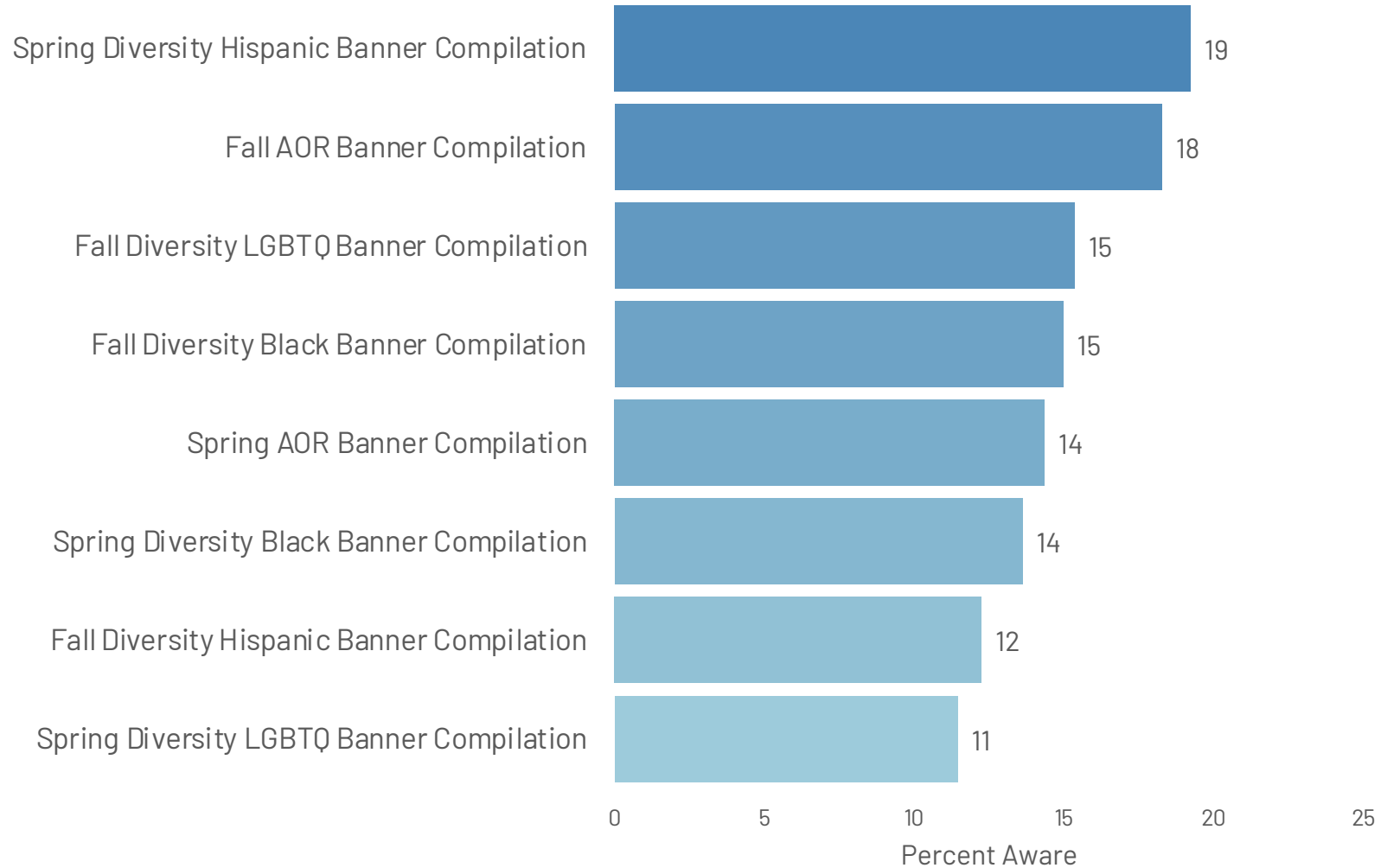
# AWARENESS\* OF DIGITAL ADS



Digital Ad  
Awareness

37%

Base: Total Markets



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

# DIGITAL ADVERTISING CREATIVE



Spring AOR Banner Compilation

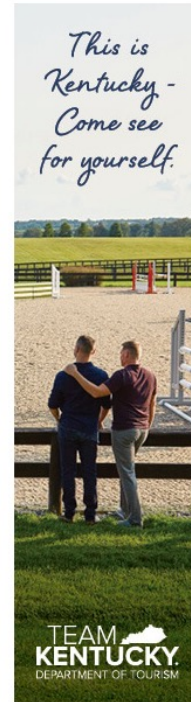


Fall AOR Banner Compilation

# DIGITAL ADVERTISING CREATIVE (CONT'D)



Spring Diversity Black Banner Compilation



Spring Diversity LGBTQ Banner Compilation



Spring Diversity Hispanic Banner Compilation

# DIGITAL ADVERTISING CREATIVE (CONT'D)



Fall Diversity Black Banner Compilation



Fall Diversity Hispanic Banner  
Compilation

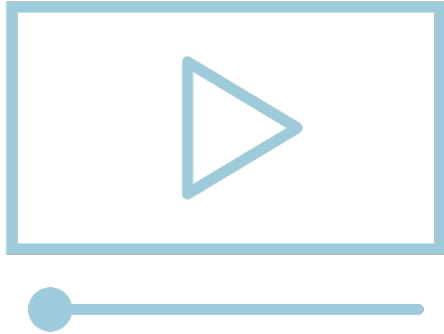


Fall Diversity LGBTQ Banner  
Compilation

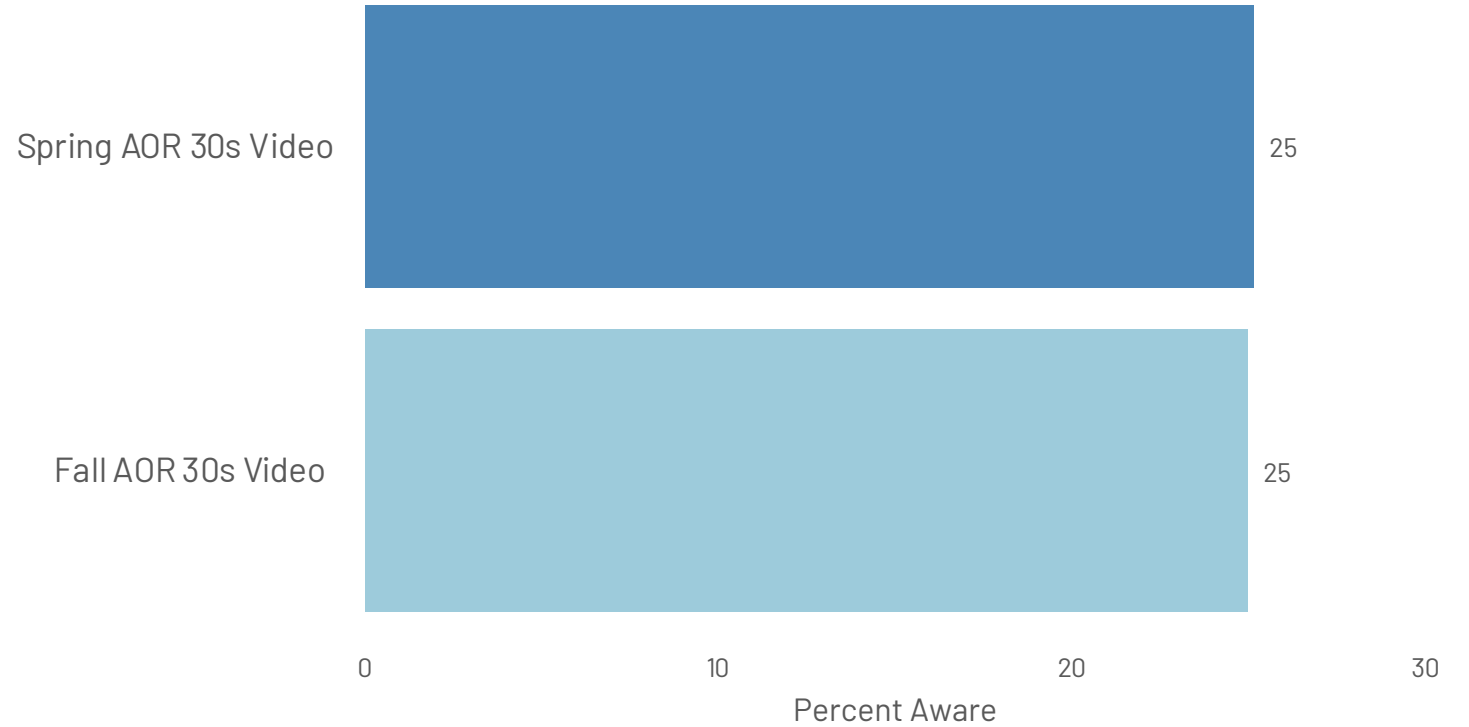


# AWARENESS\* OF VIDEO ADS

Base: Total Markets



Video Ad  
Awareness  
**32%**



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

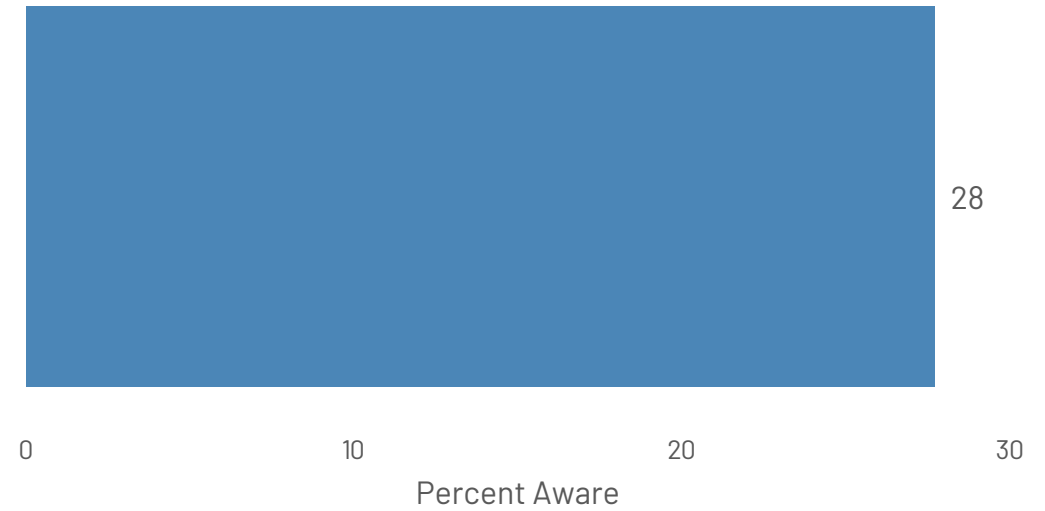
# AWARENESS\* OF RADIO AD

Base: Total Markets



Radio Ad Awareness  
**28%**

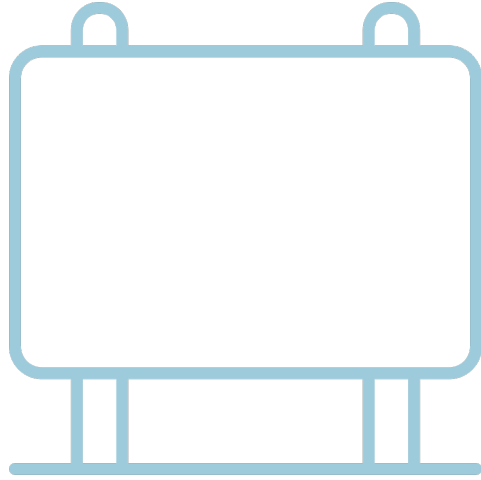
Spring/Fall AOR Radio



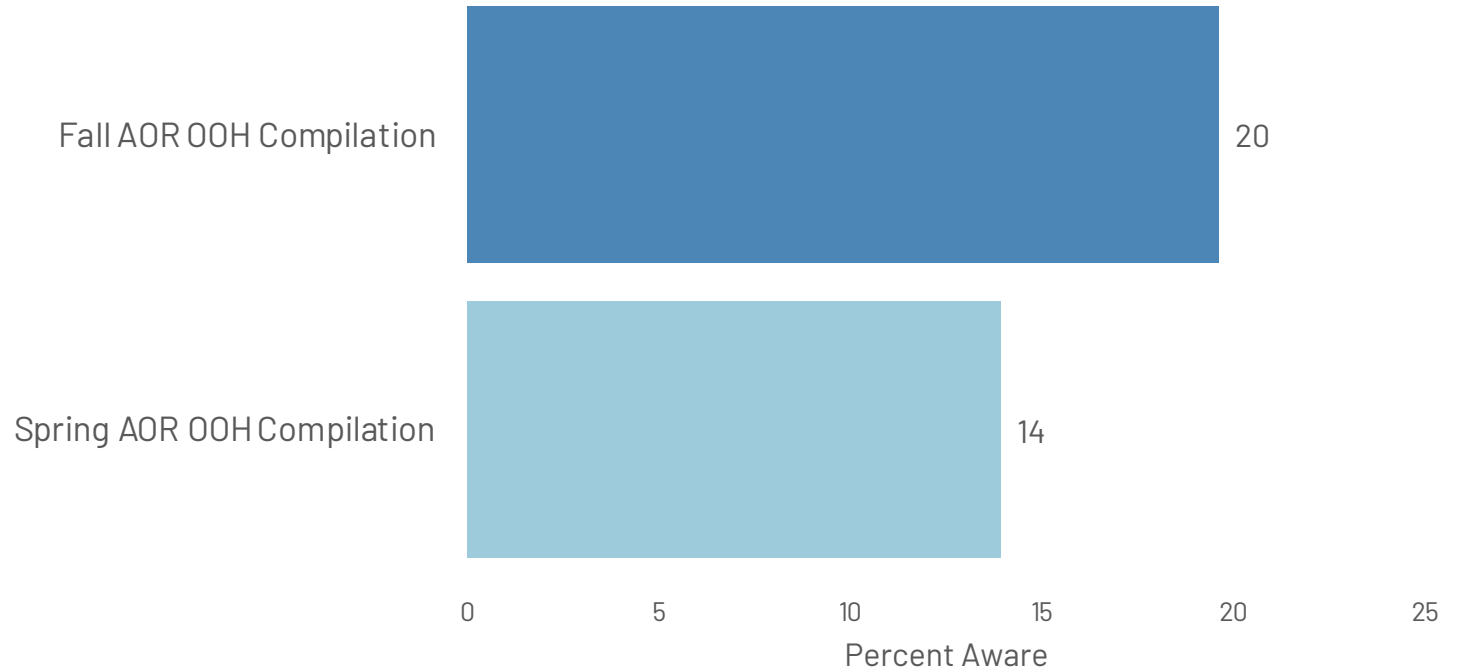
\*Saw at least one ad and based on markets where shown

# AWARENESS\* OF OUT-OF-HOME ADS

Base: Total Markets



Out-of-Home Ad  
Awareness  
**24%**



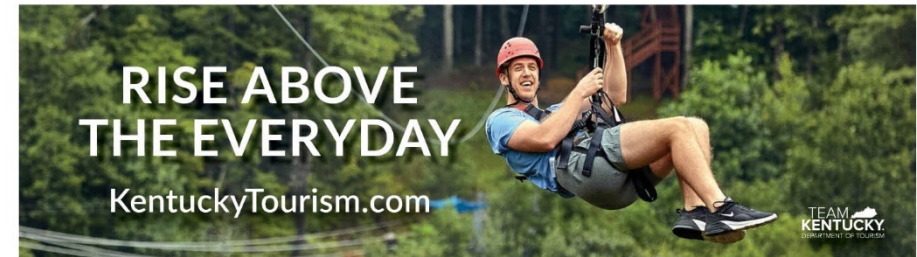
\*Saw at least one ad and based on markets where shown



# OUT-OF-HOME ADVERTISING CREATIVE



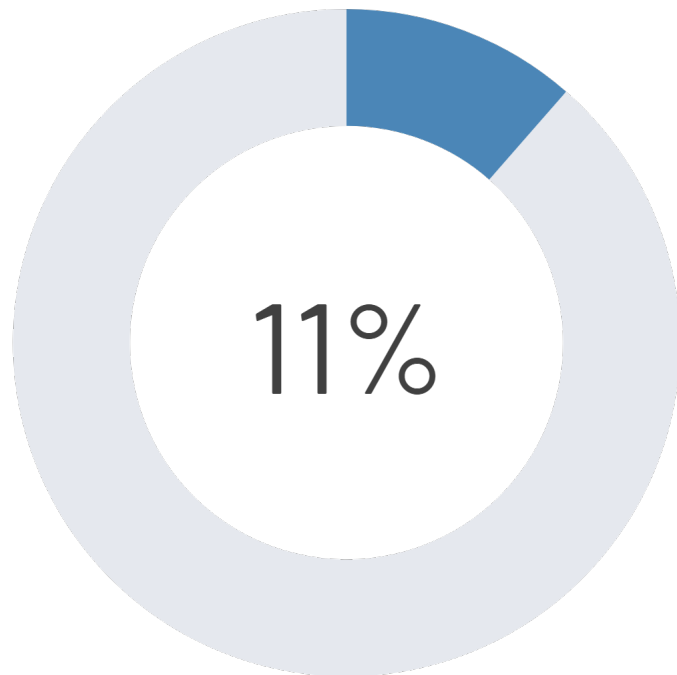
Spring AOR 00H Compilation



Fall AOR 00H Compilation

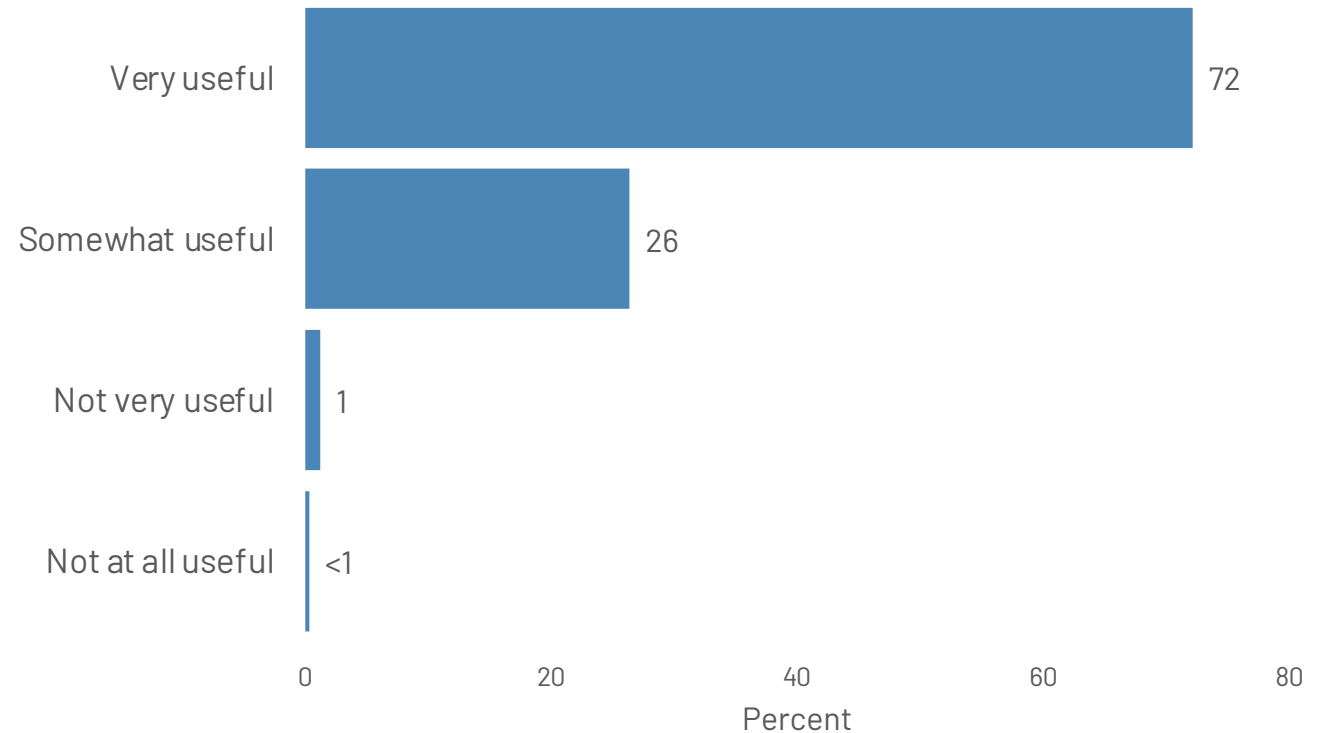
Base: Total Markets

## Awareness of Website



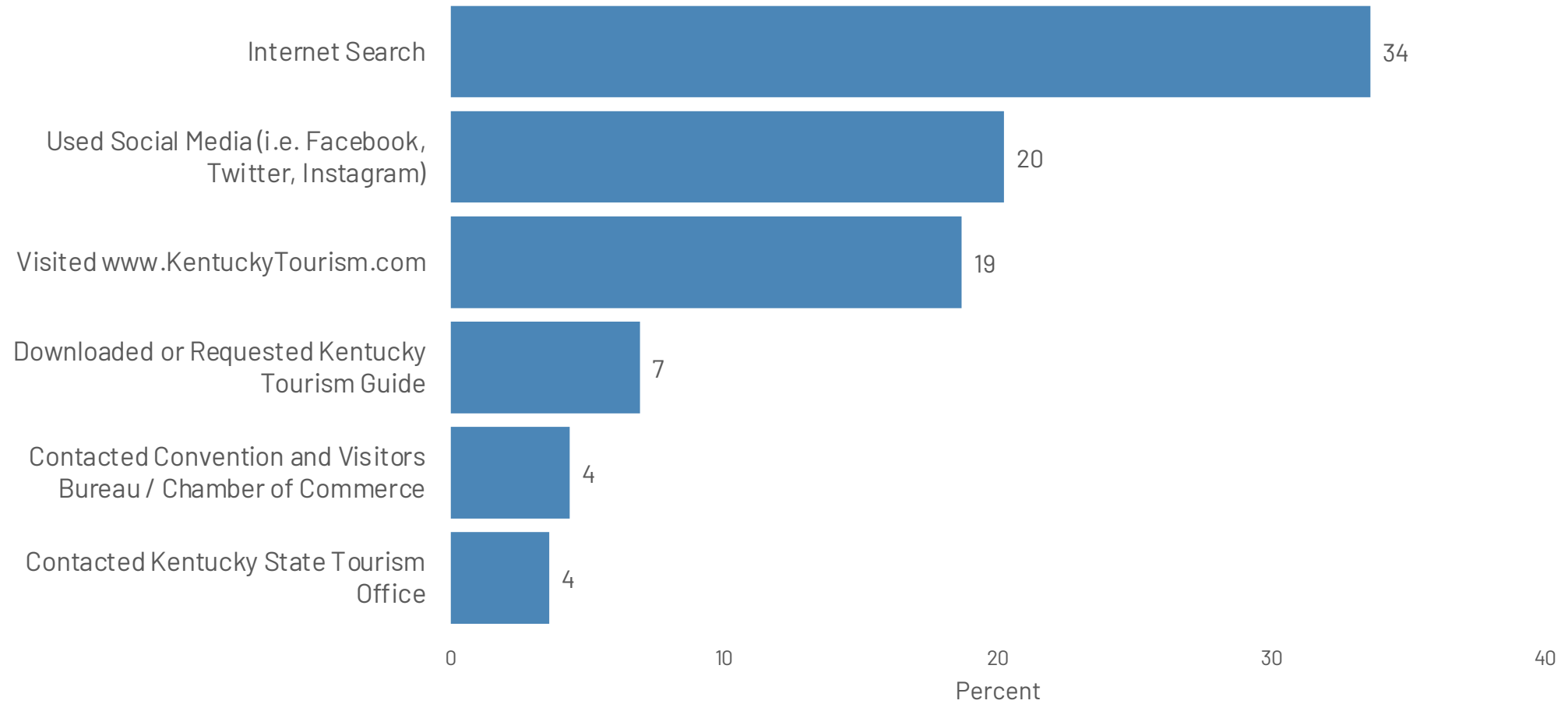
2022 Awareness of Website: 14%

## How useful was the Tourism Kentucky website?



# ACTIONS TAKEN TO OBTAIN INFORMATION ABOUT TRAVELING TO KENTUCKY

Base: Total Markets



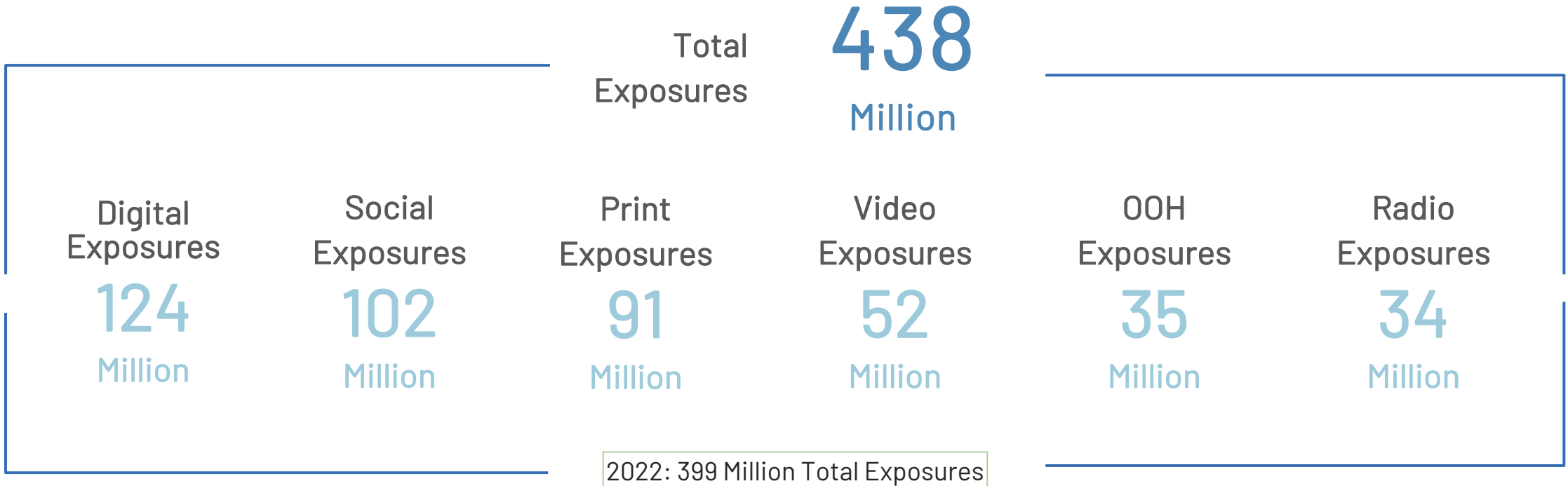


[ MEDIA DIAGNOSTICS ]

TEAM  KENTUCKY®

# TOTAL EXPOSURES\* RECALLED BY MEDIUM

Base: Total Markets

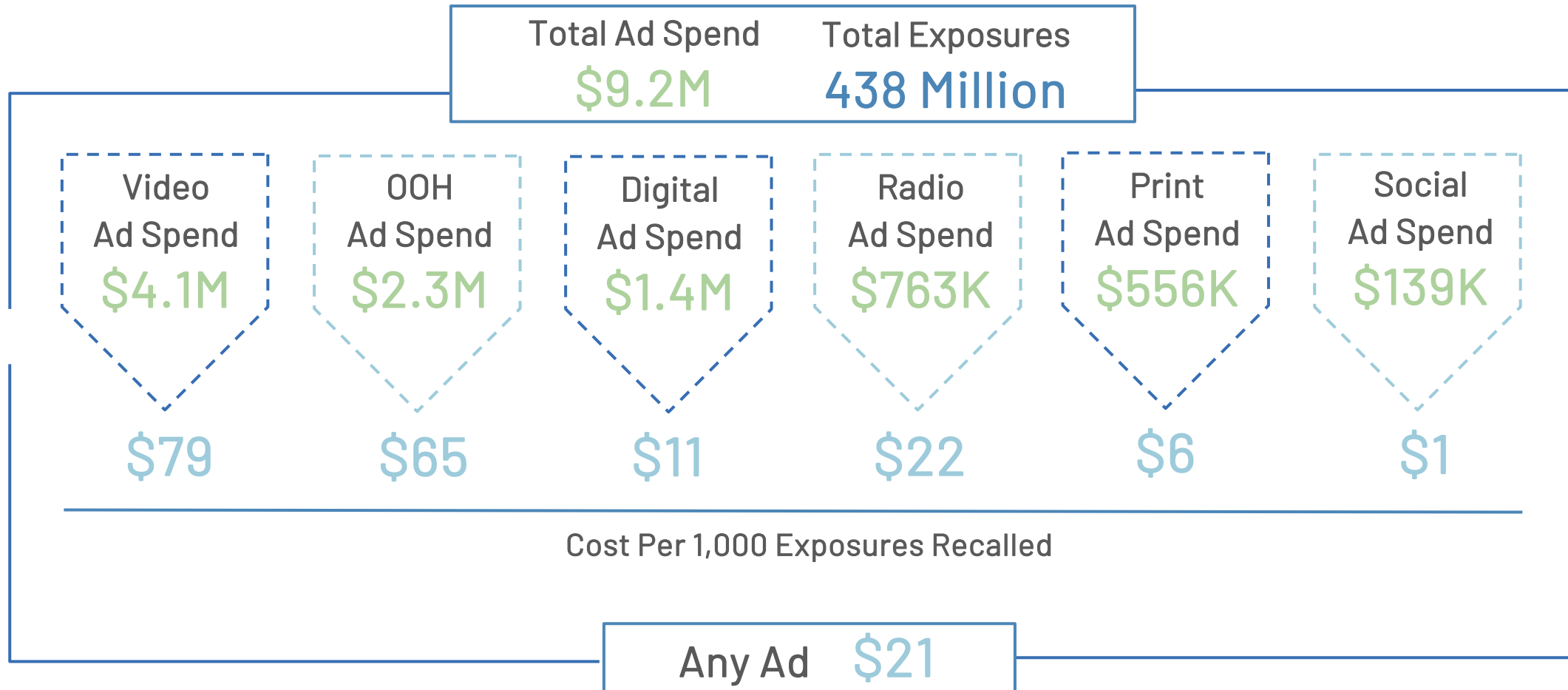


Looking at **Kentucky's primary advertising markets**, there were an estimated 438 million recalled ad exposures over the campaign period, 39 million more than achieved in 2022. Both digital and social ads had over 100 million recalled exposures.

\*Incidence of awareness x traveler population x mean frequency recalled

# COST PER THOUSAND EXPOSURES RECALLED

Base: Total Markets



Optimal cost per 1,000 for any ad recalled is between \$10 - \$30. Kentucky performs well in this metric.

2022: Any Ad \$16  
2022: 399 Million Total Exposures

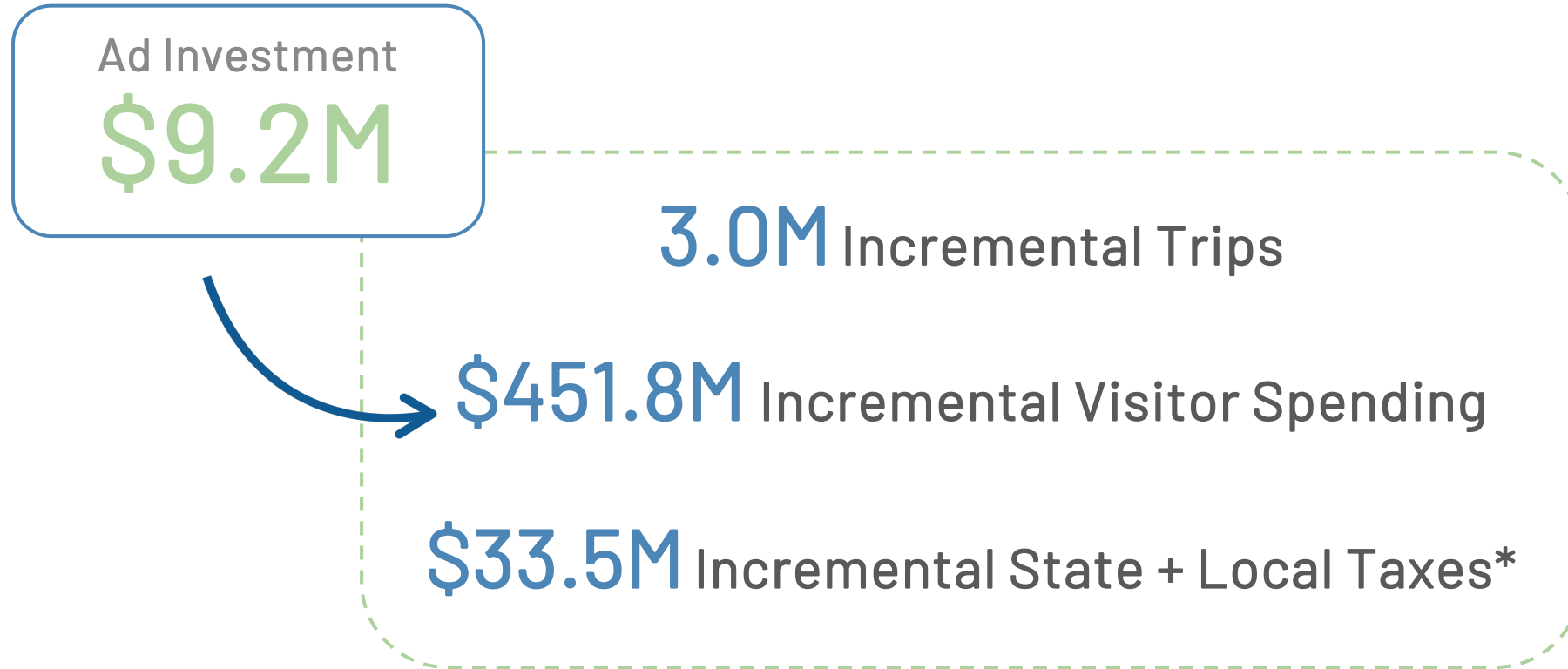


# [RETURN ON INVESTMENT]



# RETURN ON INVESTMENT: 2023

Base: Total Markets



\*Effective Tax Rate 7.4% (from Tourism Economics)



# RETURN ON INVESTMENT: 2023

Base: Total Markets

	Existing Markets	New Markets	Total
Ad Investment	\$7.0M	\$2.2M	\$9.2M
Incremental Trips	2.4M	0.6M	3.0M
Incremental Visitor Spending	\$336.2M	\$115.6M	\$451.8M
Incremental State + Local Taxes*	\$24.9M	\$8.6M	\$33.5M

# RETURN ON INVESTMENT: 2023 (Cont'd)

Base: Total Markets

## AD INVESTMENT CONVERSION

Each incremental trip earned by the 2023 Kentucky campaigns cost \$3.07.

## CAMPAIGN EFFICIENCY

Ad \$'s Per Trip: **\$3.07**

Trips Per Ad \$: **0.33**

# RETURN ON INVESTMENT

Base: Total Markets

	Existing Markets	New Markets	Total
Ad \$'s per Trip	\$2.93	\$3.66	\$3.07
Trips per Ad \$	0.34	0.27	0.33

# RETURN ON INVESTMENT

Base: Total Markets

	2018	2019	2020*	2021**	2022***	2023*** *
Ad \$'s per Trip	\$ 1.86	\$3.06	\$8.81	\$2.00	\$2.42	\$3.07
Trips per Ad \$	0.54	0.33	0.11	0.50	0.41	0.33

\*In-State Only

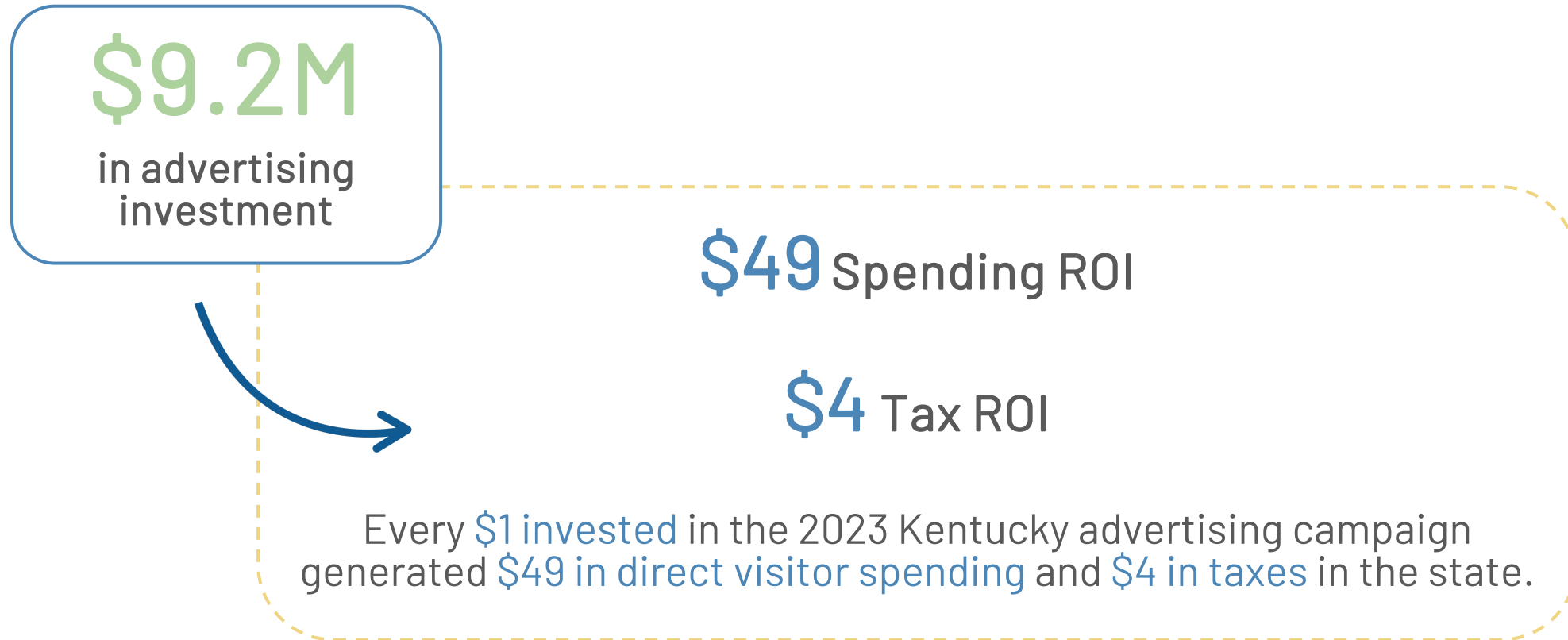
\*\* Includes 2021 Existing & New Markets

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

\*\*\*\* 2023 Markets: *Compared to 2022 Markets - Existing Markets excludes Tri-Cities DMA Counties & Detroit, and New Markets excludes Dayton and includes Champaign-Springfield-Decatur, Grand Rapids-Kalamazoo-Battle Creek, and Detroit.*

# THE BOTTOM LINE: 2023

Base: Total Markets



\*Effective Tax Rate 7.4% (from Tourism Economics)

# THE BOTTOM LINE

Base: Total Markets

	Existing Markets	New Markets	Total
Spending ROI	\$48	\$53	\$49
Tax ROI	\$4	\$4	\$4

# THE BOTTOM LINE

Base: Total Markets

	2018	2019	2020*	2021**	2022***	2023****
Spending ROI	\$60	\$39	\$10	\$66	\$60	\$49
Tax ROI	\$5	\$3	\$1	\$5	\$5	\$4

\*In-State Only

\*\* Includes 2021 Existing & New Markets

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

\*\*\*\* 2023 Markets: *Compared to 2022 Markets - Existing Markets excludes Tri-Cities DMA Counties & Detroit, and New Markets excludes Dayton and includes Champaign-Springfield-Decatur, Grand Rapids-Kalamazoo-Battle Creek, and Detroit.*



DESTINATION VISITATION  
& INTEREST

TEAM   
KENTUCKY®



# PAST VISITATION

Base: Total Markets



Half of travelers within Kentucky's total advertising markets have visited the state during their lifetime. Among those, over half have visited during the past 2 years.

	Ever Visited	Visited in Past 2 Years*
Georgia	50%	55%
Indiana	38%	55%
Tennessee	59%	55%
Ohio	45%	54%
Kentucky	48%	53%
North Carolina	47%	46%
West Virginia	27%	43%

\*Among those who have ever visited respective destination

# INTENT TO VISIT IN NEXT 12 MONTHS

Base: Total Markets



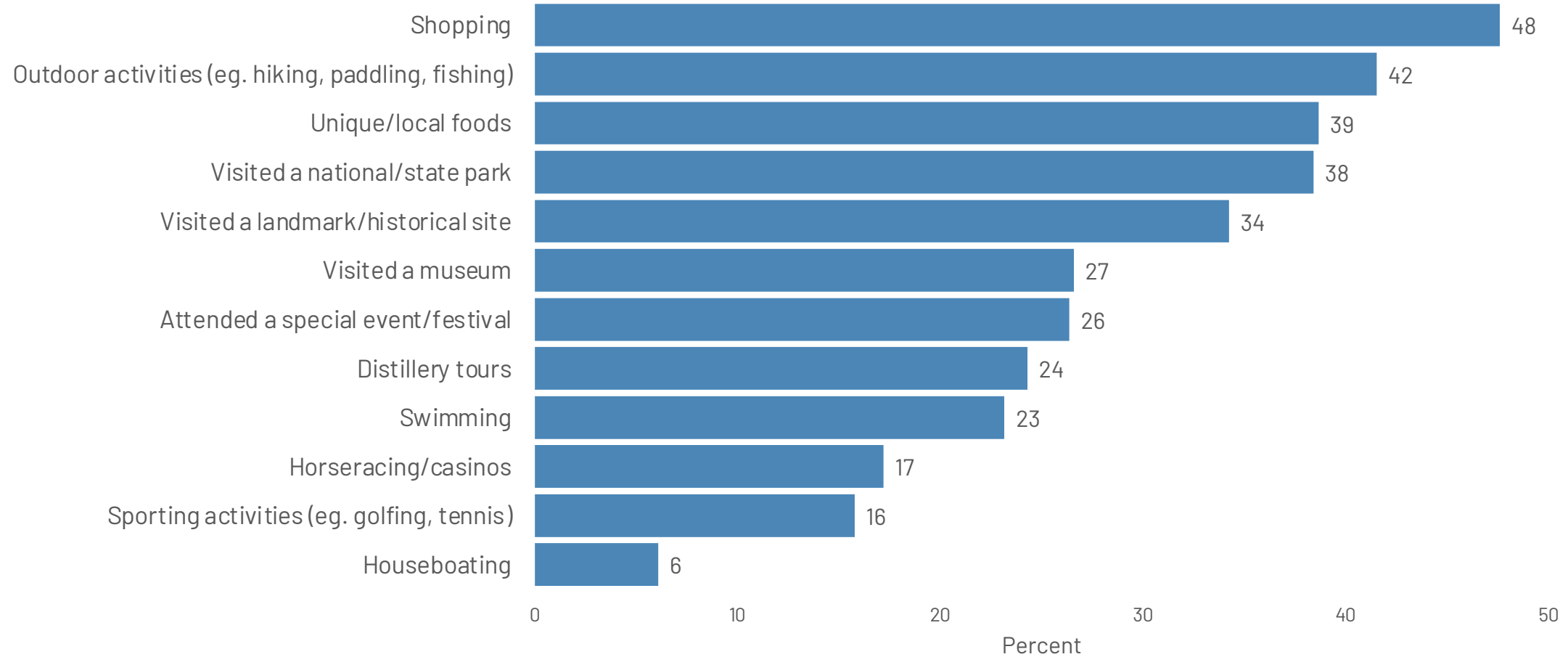
Four in ten intend to visit Kentucky during the next 12 months.

	Probably or Definitely Will Visit Destination in Next 12 Months*
Tennessee	51%
Georgia	45%
North Carolina	43%
Kentucky	40%
Ohio	39%
Indiana	37%
West Virginia	31%

\*On a day or overnight leisure trip

# ACTIVITIES PARTICIPATED ON OVERNIGHT TRIP TO KENTUCKY

Base: Among those who took an overnight trip to Kentucky





[IMAGE OVERVIEW]

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# WHAT IS A TRAVEL MOTIVATOR?



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

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

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

## Travel Motivators in this Study

Exciting

Adult Destination

Sightseeing

Unique

Family Atmosphere

Luxurious

Entertainment

Popular

Worry-Free

Sports and Recreation

Climate

Affordable

\*Correlations are a measure of the degree of association between each factor and whether the destination is a place "I'd really enjoy visiting."

## Exciting

Must see destination

A fun place

An exciting place

A real adventure

## Adult Destination

Good for an adult vacation

Good for couples

## Sightseeing

Is an interesting place

Lots to see and do

Interesting cities

Great for sightseeing

Truly beautiful scenery/setting

Well-known landmarks

Great shopping

Beautiful gardens and parks

Interesting historic sites

Interesting architecture

Excellent museums/galleries

Great place for walking/strolling about

Interesting small towns/villages

## Unique

Unique travel experience

Truly unique scenery

Interesting local people/cultures

Interesting/notable culinary scene

Interesting customs/traditions

Unique distillery tours

## Family Atmosphere

Children would enjoy

Good for families

## Luxurious

Great place to experience fine dining

First-class hotels/resorts

Offers a variety of accommodations

Offers a variety of dining options

Great spas

Noted for innovative, unique cuisine

## Entertainment

Exciting nightlife/entertainment

Interesting festivals/fairs/events

Great live music

Great for theatre and the performing arts

## Popular

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

## Worry-Free

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

## Sports and Recreation

- Great conservation areas
- Excellent national/state park facilities
- Great for kayaking/canoeing/rafting
- Good for hiking/backpacking
- Great for swimming
- Good place for camping
- Great for bicycling
- Great sporting events

## Climate

- Great climate overall
- Good weather in the spring
- Good weather in the fall
- Great for a winter vacation
- Good weather in the summer

## Affordable

- Good vacation packages
- Easy to get to
- Affordable accommodations
- Affordable to eat there
- Affordable to get to
- Not too far away

# TRAVEL MOTIVATORS

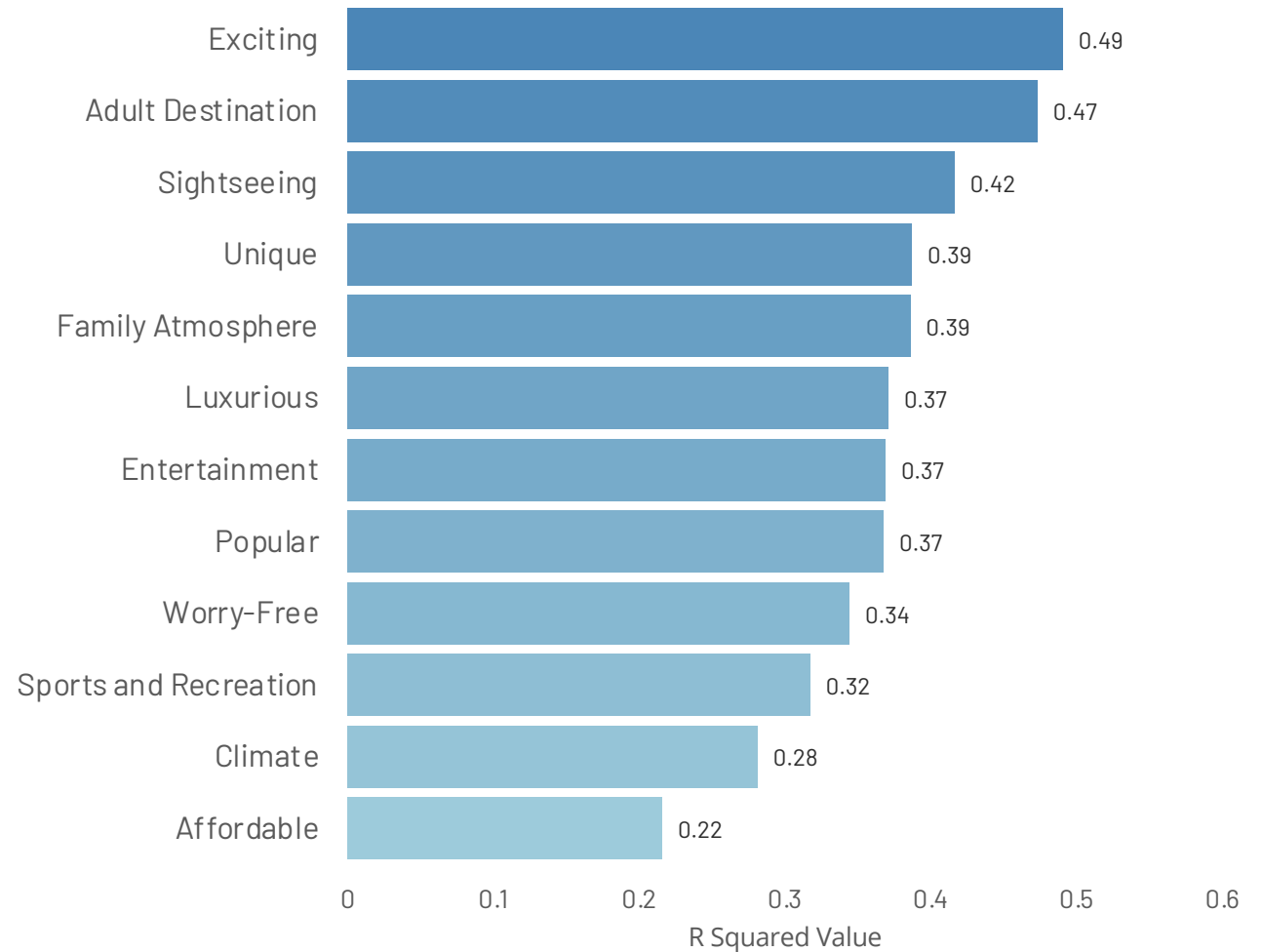
## Kentucky's Travel Motivators

For a destination in Kentucky's total markets to get on travelers' consideration list, it must, first and foremost, be perceived to be **exciting, great for an adult vacation, and have strong sightseeing opportunities.**

Other factors of moderate importance include being **unique, having a family atmosphere, being luxurious, having entertainment options, and being popular.**

Lower priorities when selecting the destination are being **worry-free, having sports and recreation offerings, the climate, and affordability.**

Base: Total Markets



\*Correlations are a measure of the degree of association between each factor and whether destination is a place "I'd really enjoy visiting."



Base: Total Markets



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

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

## HOT BUTTONS

Must see destination

A fun place

An exciting place

Is an interesting place

Lots to see and do

Good for an adult vacation

Interesting cities

Good for couples

Unique travel experience

Popular with travelers

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



[ KENTUCKY IMAGE  
2023 vs 2022 vs 2021 ]



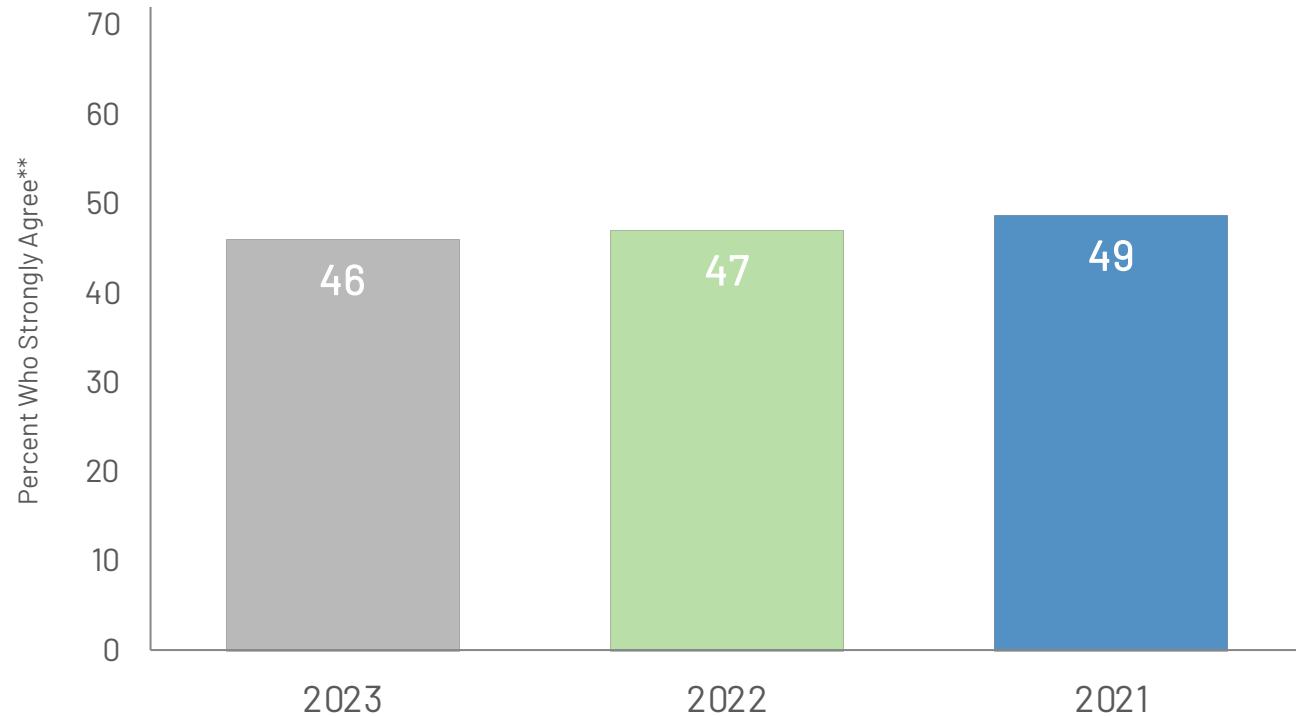
# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021

Base: Total Markets

"A Place I'd Really Enjoy Visiting"

Almost half of travelers in Kentucky's total markets strongly agree the state is a place they'd really enjoy visiting. This result is statistically the same as 2022 and 3 points lower than 2021.

Focusing on the year-over-year changes to the 2023 Hot Buttons, Kentucky as a fun place has rebounded to 2021 levels, after falling 5 points in 2022. Similarly, in 2023 popular with travelers regained 3 of the 5 points it lost in 2022. An exciting place is down 3 points from 2021. The remaining Hot Buttons are statistically the same for all three years.

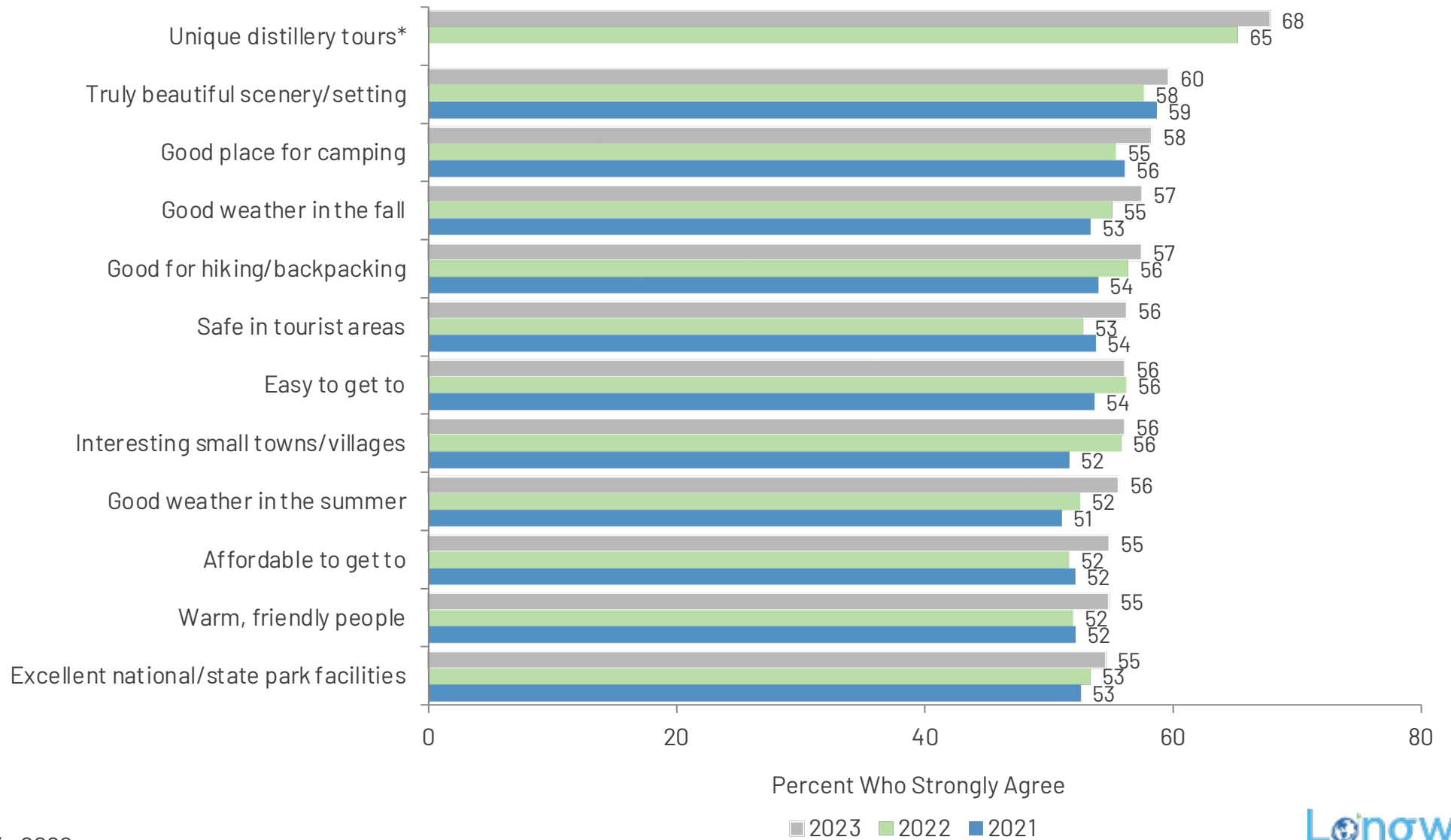


\*Saw at least one ad

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

# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021

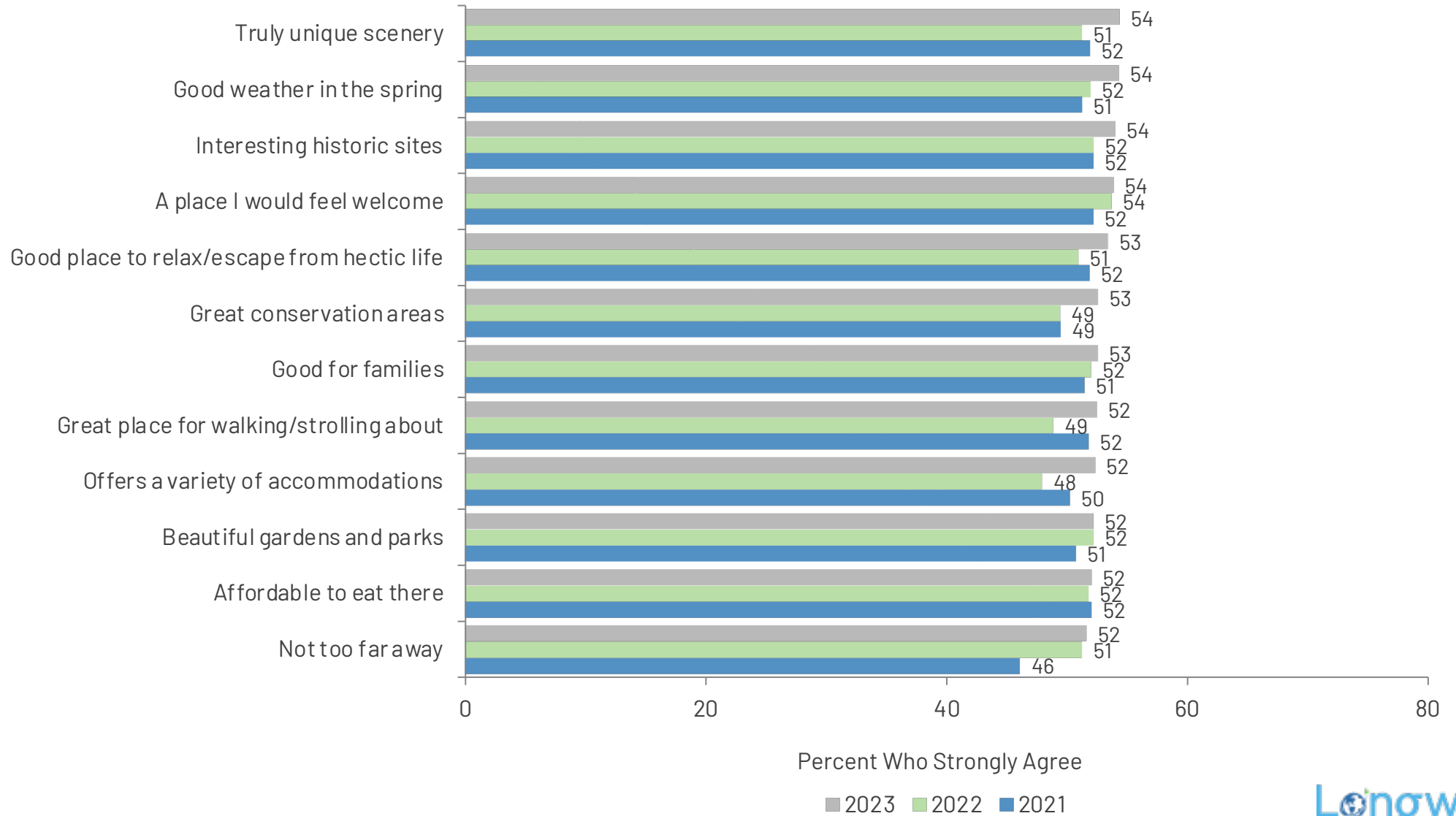
Base: Total Markets



\*Attribute added in 2022

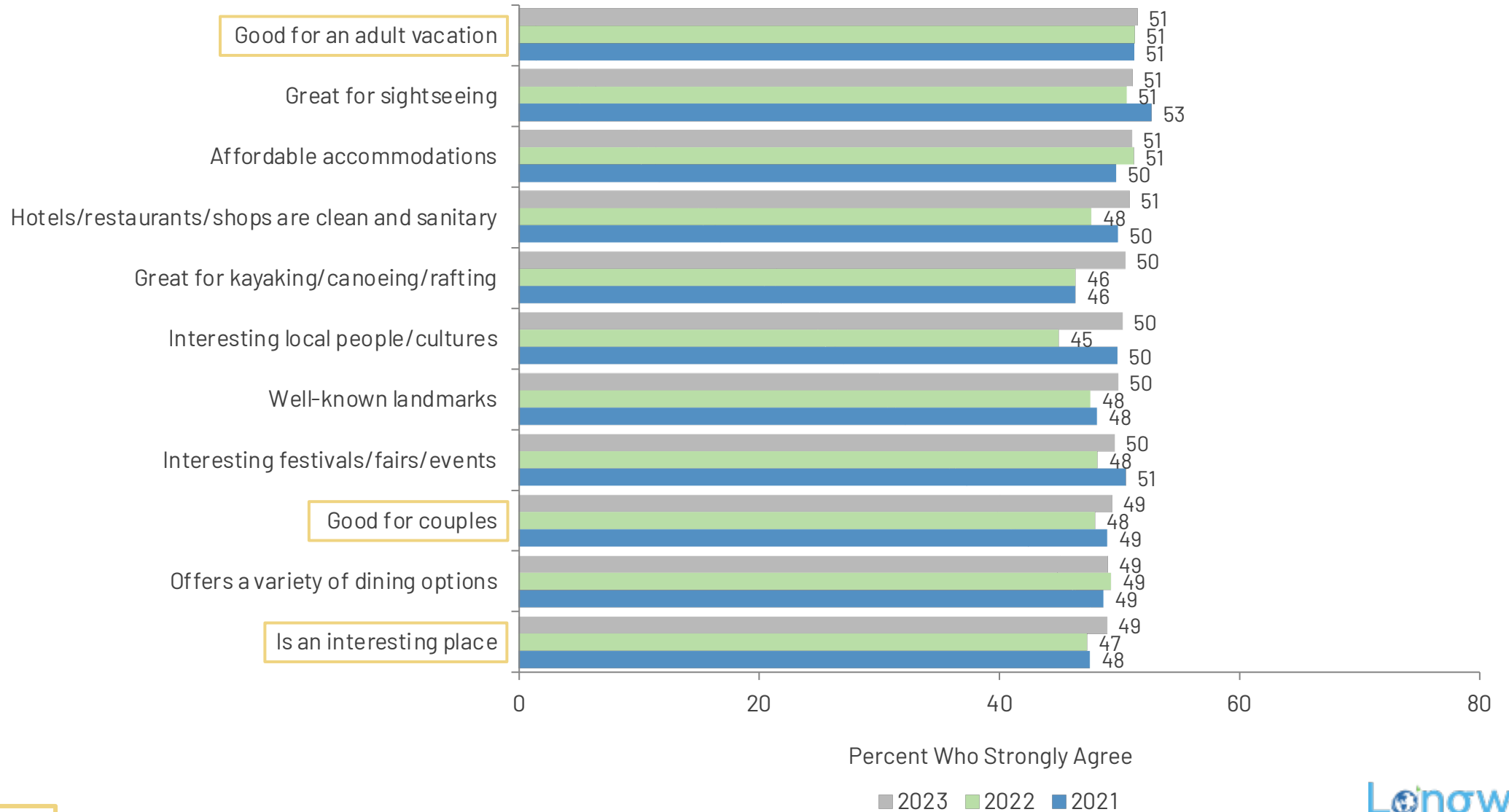
# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021 (CONT'D)

Base: Total Markets



# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021 (CONT'D)

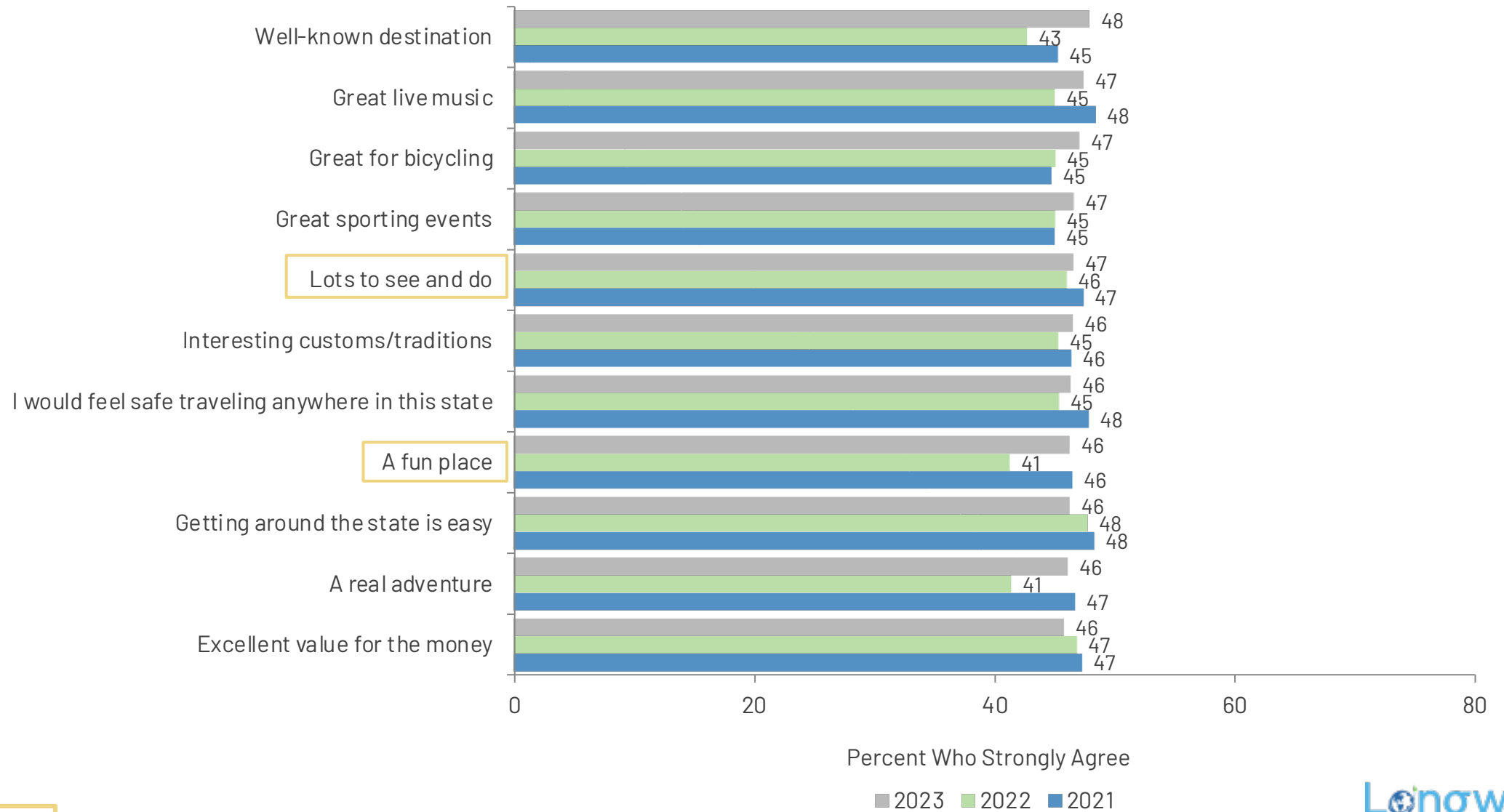
Base: Total Markets



2023 Hot Button

# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021 (CONT'D)

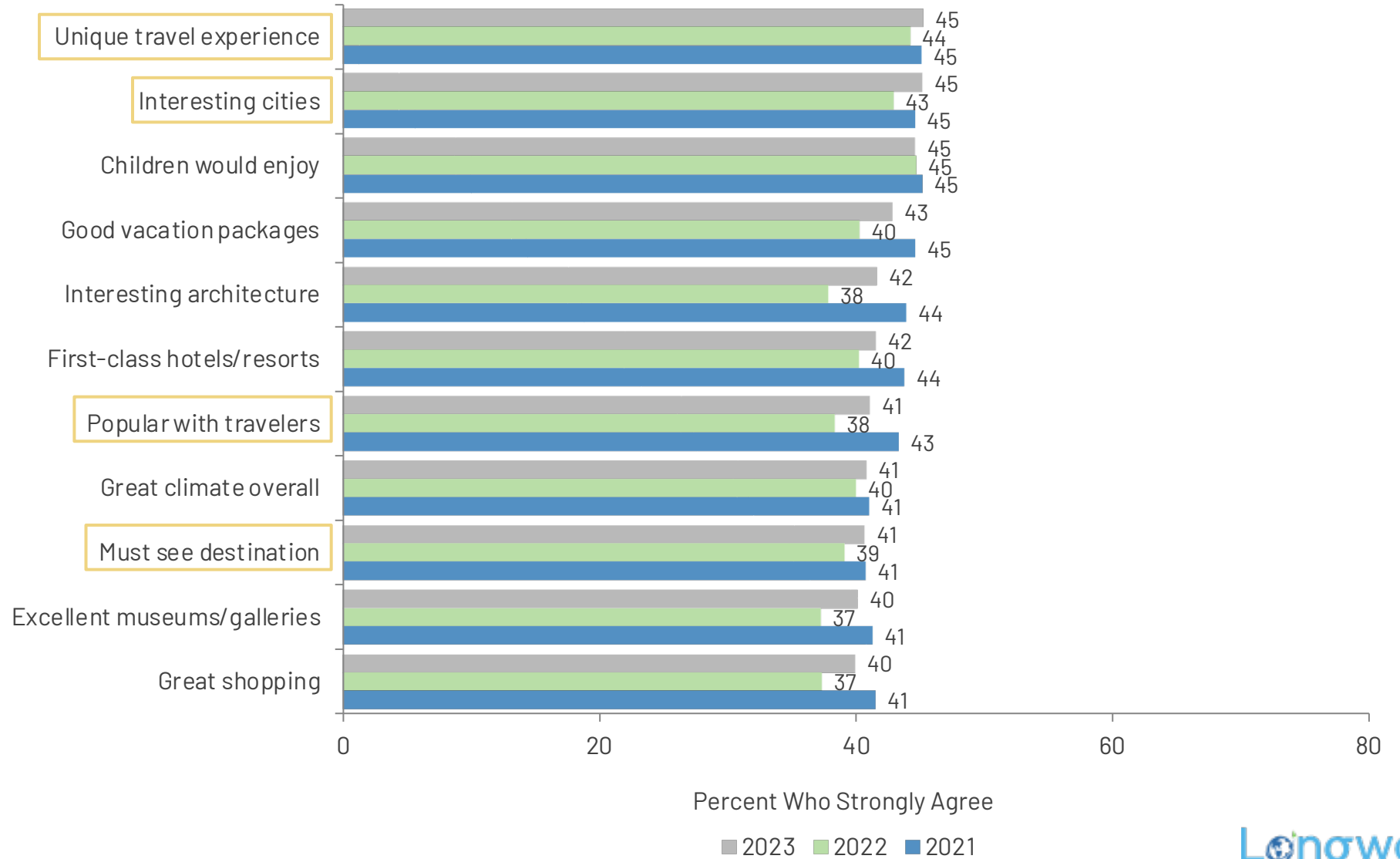
Base: Total Markets



2023 Hot Button

# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021 (CONT'D)

Base: Total Markets

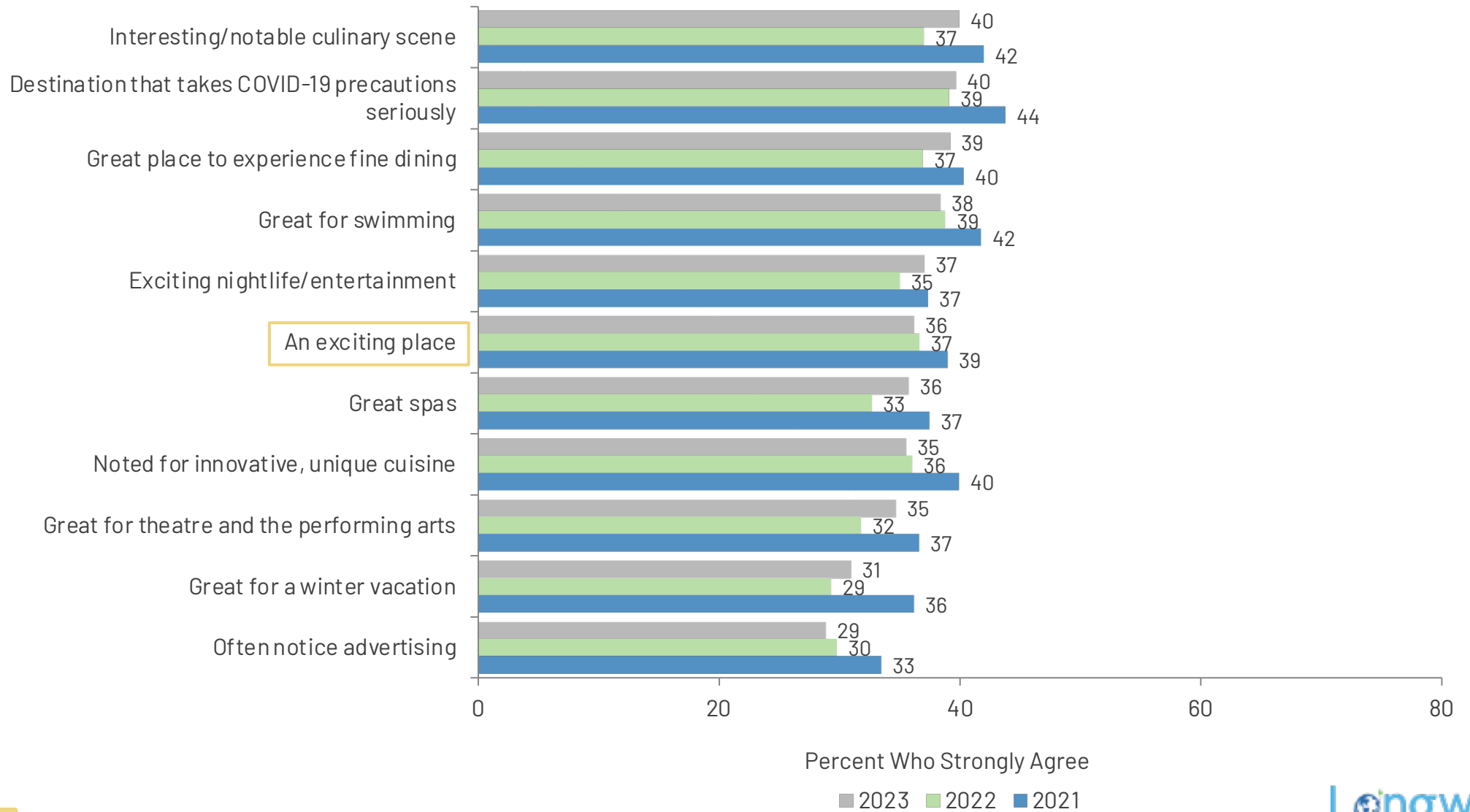


2023 Hot Button



# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021 (CONT'D)

Base: Total Markets



2023 Hot Button



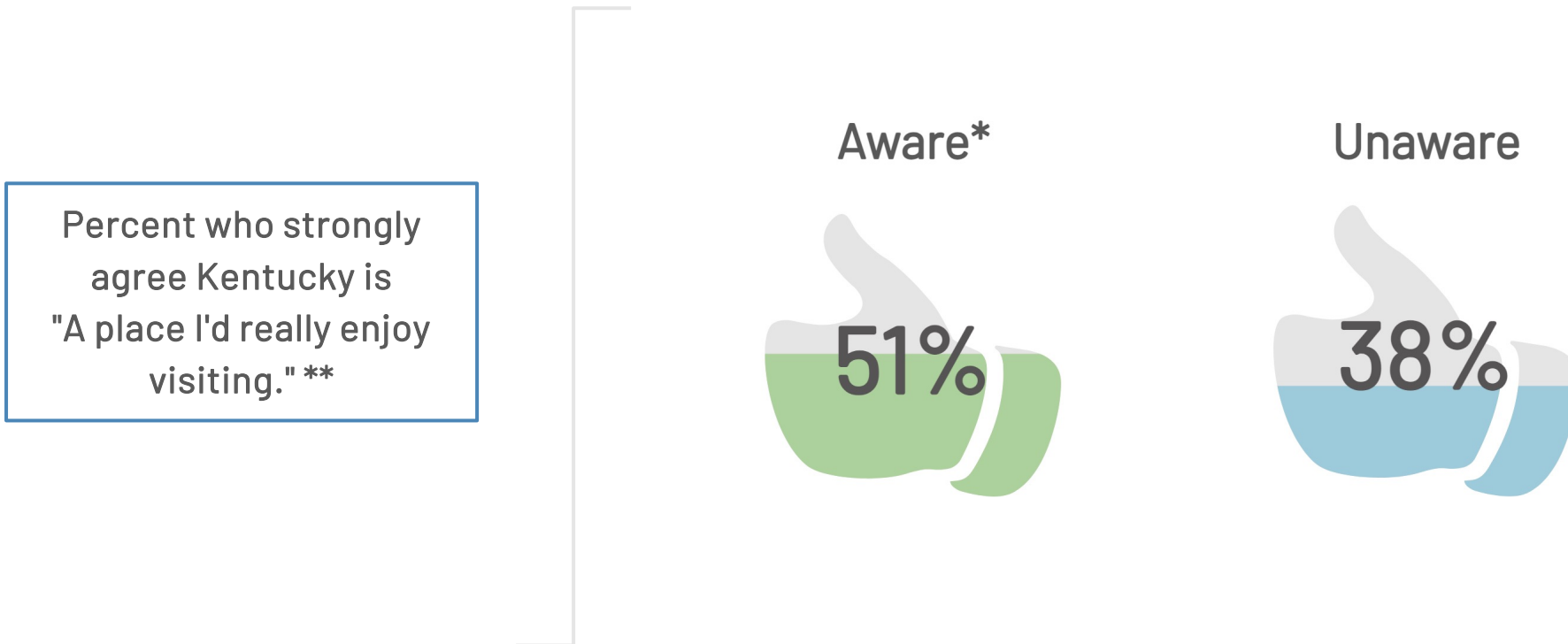
# [ ADVERTISING IMPACT ON IMAGE ]



# ADVERTISING IMPACT ON OVERALL IMAGE

Base: Total Markets

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



\*Saw at least one ad

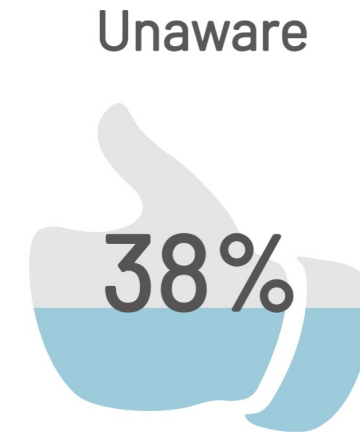
\*\*"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

# ADVERTISING IMPACT ON OVERALL IMAGE

Base: Total Markets

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

Percent who strongly agree Kentucky has "Excellent value for the money." \*\*



\*Saw at least one ad

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

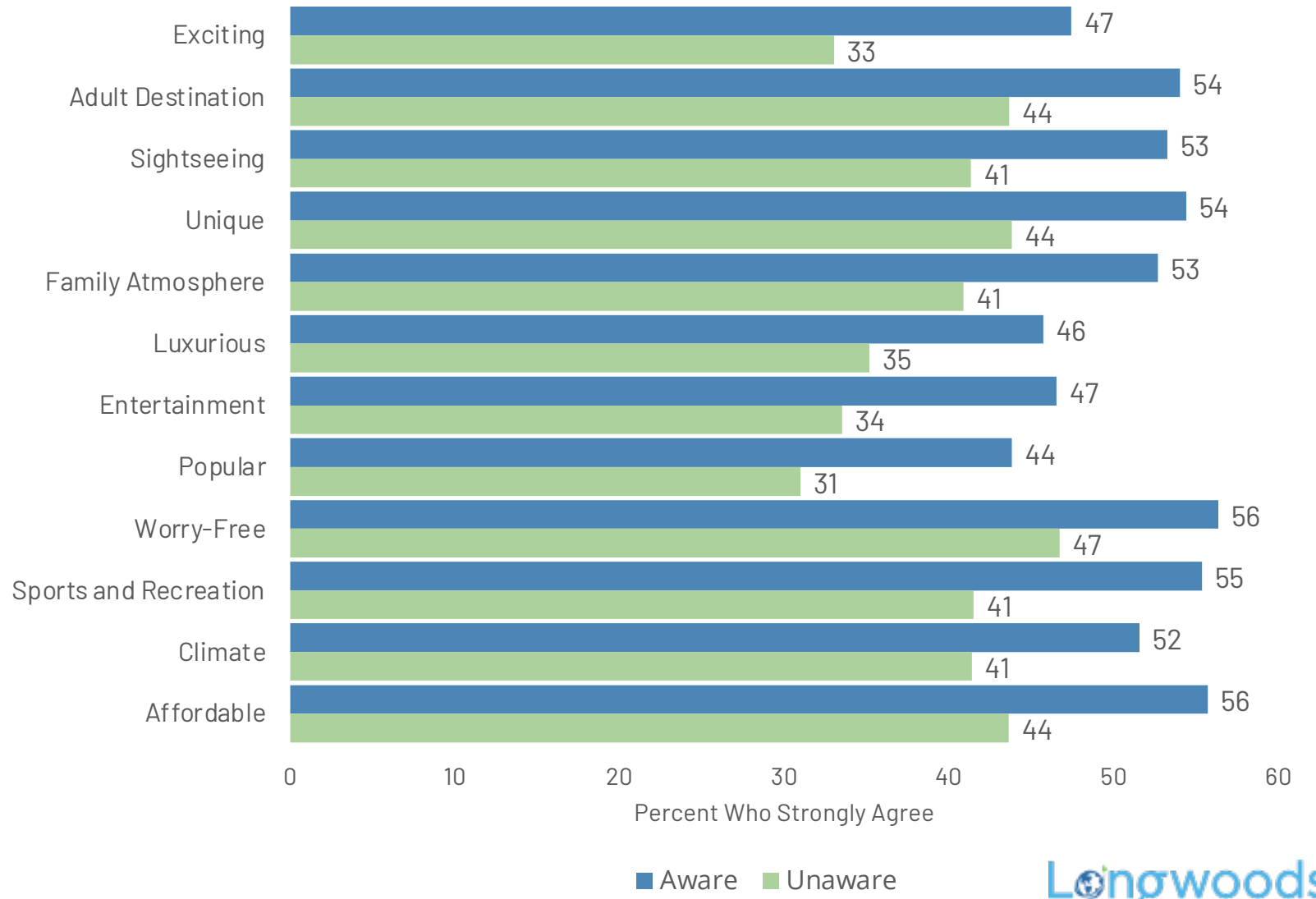
# ADVERTISING IMPACT ON IMAGE

Base: Total Markets

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

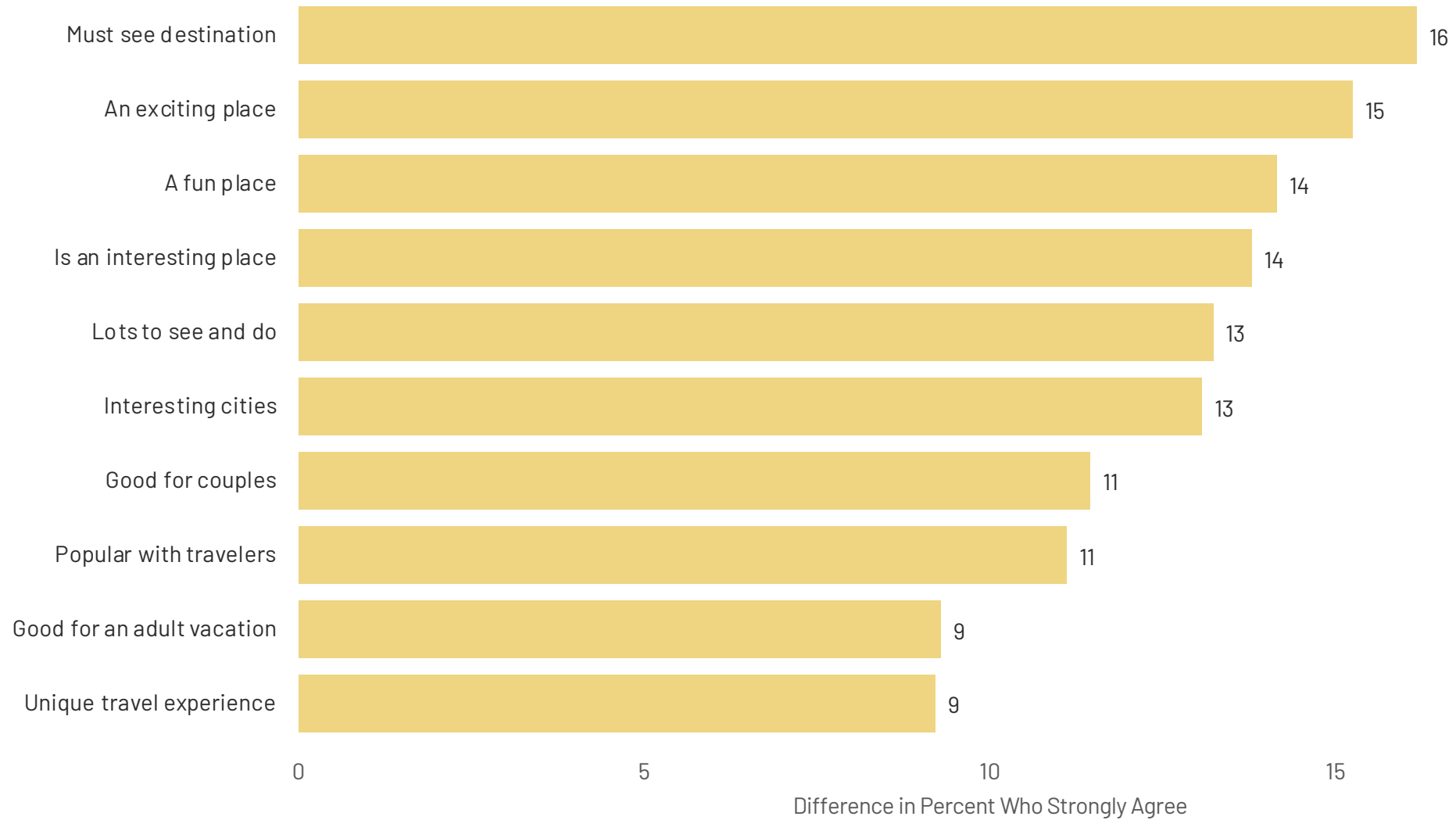
People exposed to the campaign gave the state higher rating scores than those unfamiliar with the campaign across all Travel Motivator categories.

For the more detailed attributes, we find that the campaign did an exceptional job of improving people's perceptions of Kentucky for almost every image dimension evaluated, including all 10 Hot Buttons.



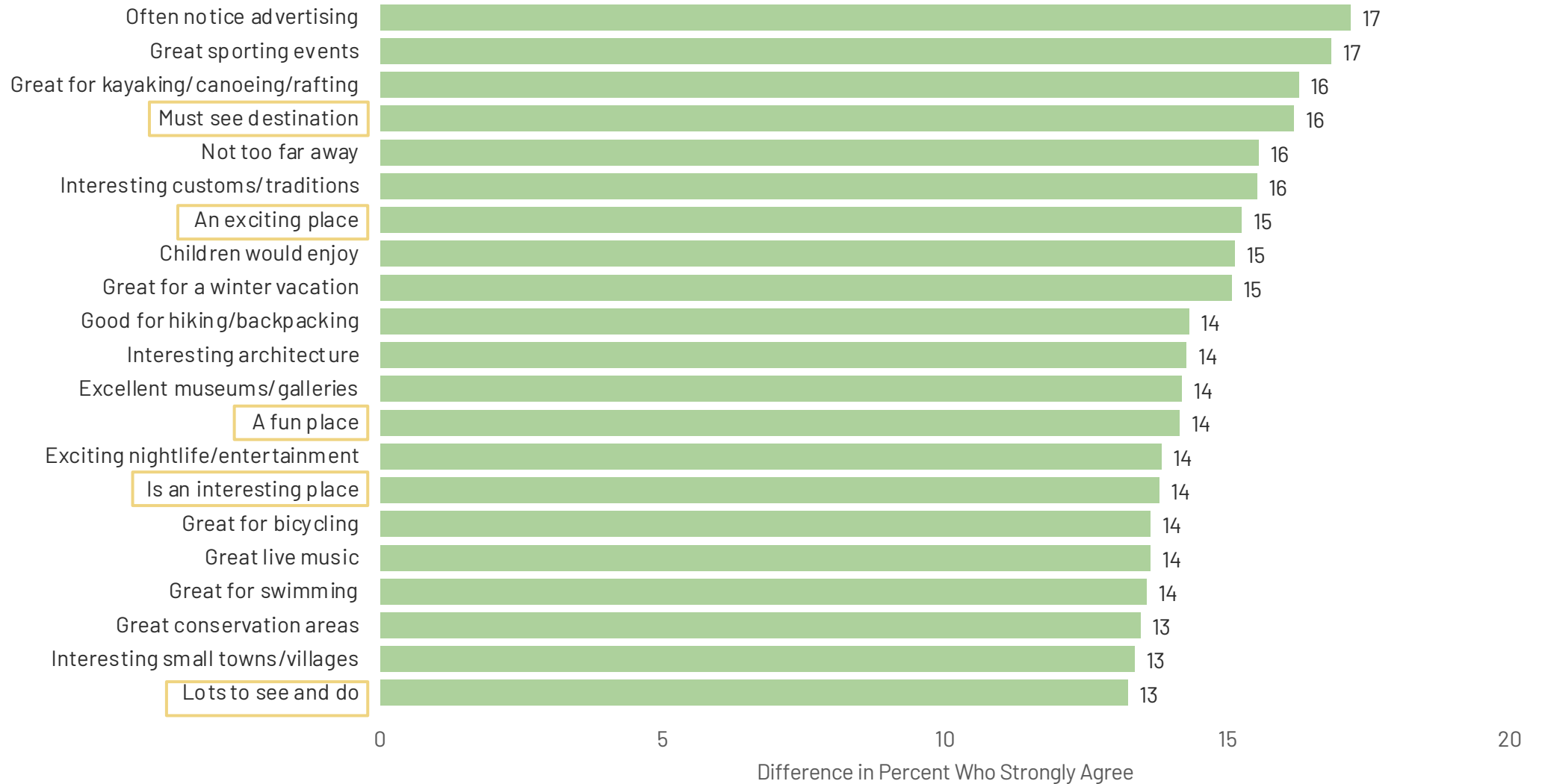
# HOT BUTTONS MOST IMPACTED BY ADVERTISING

Base: Total Markets



# IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING

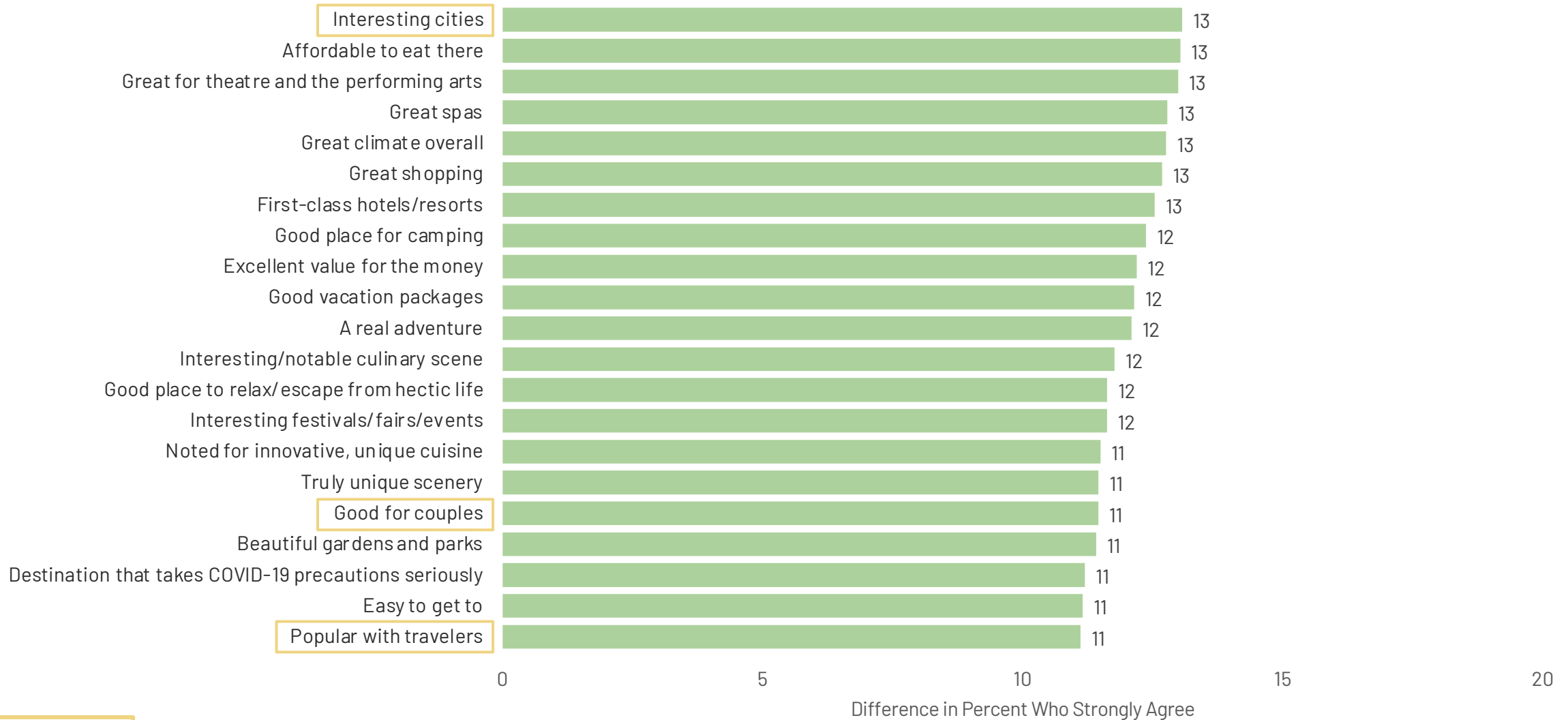
Base: Total Markets



Hot Button

# IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (CONT'D)

Base: Total Markets

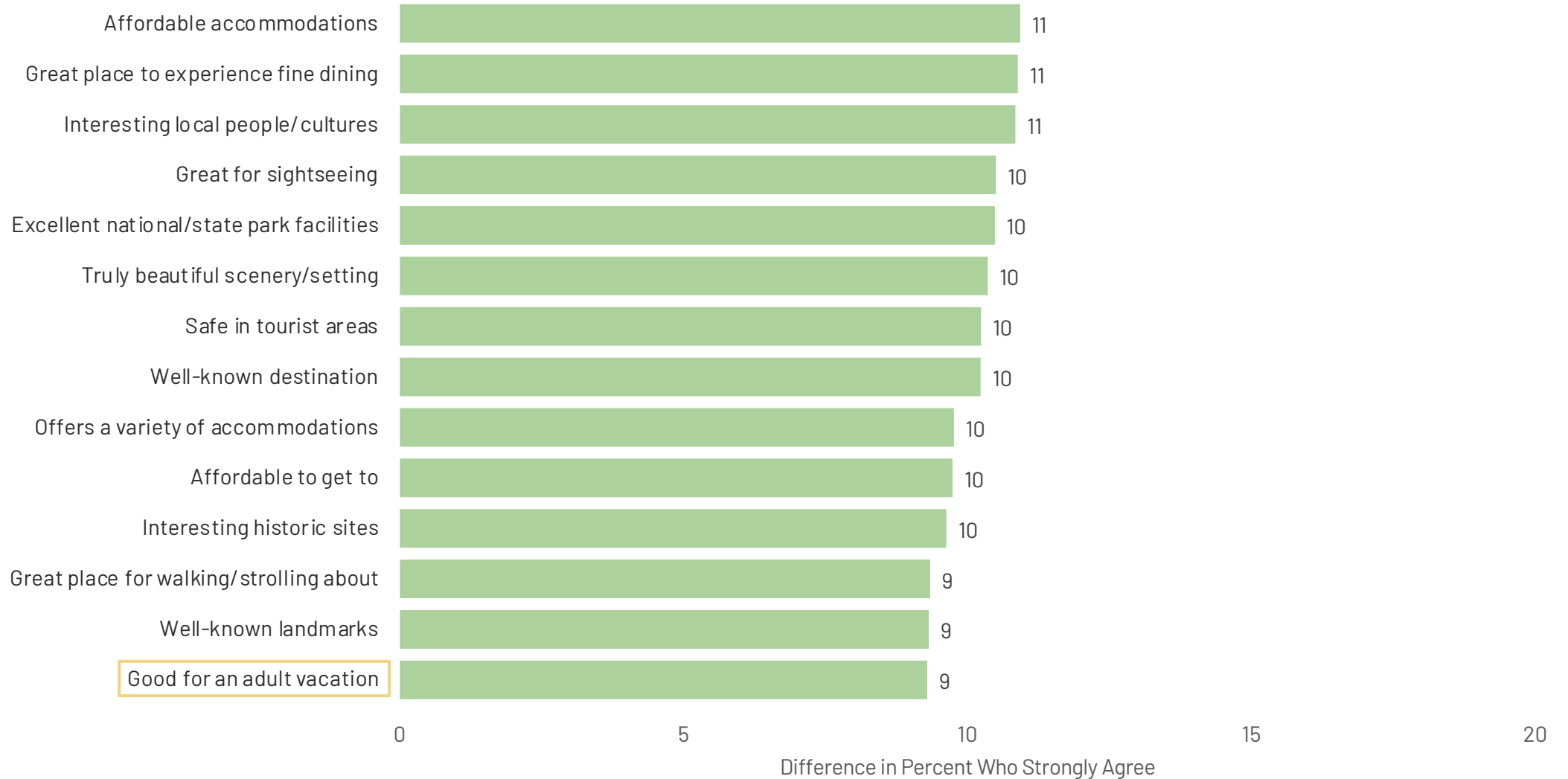


Hot Button



# IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (CONT'D)

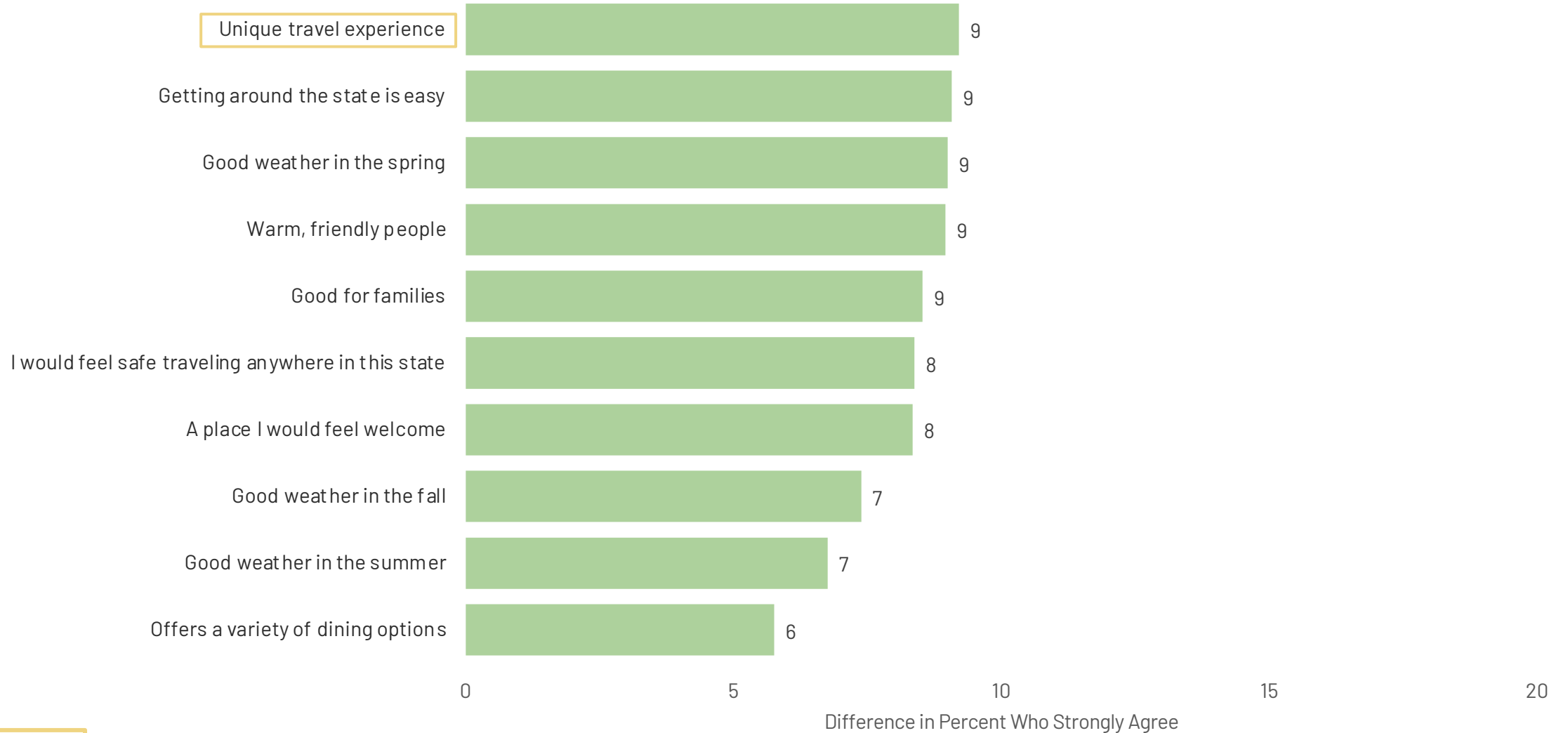
Base: Total Markets



Hot Button

# IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (CONT'D)

Base: Total Markets



Hot Button

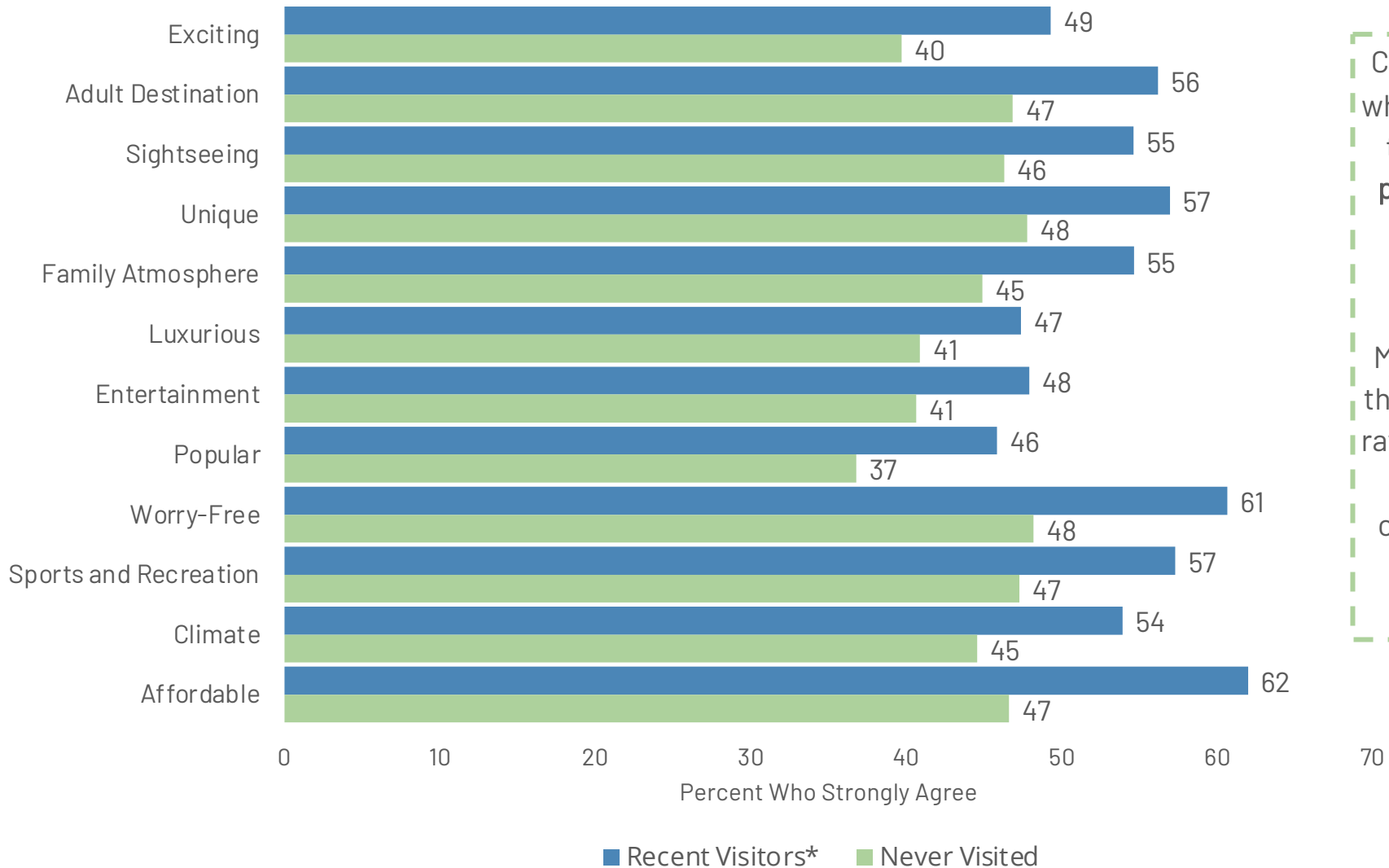


[PRODUCT DELIVERY]

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# PRODUCT VS. IMAGE

Base: Total Markets



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

More travelers who visited Kentucky in the past two years gave the state higher rating scores than those who have never visited across all Travel Motivator categories. From this analysis we find that Kentucky has no significant product weaknesses.

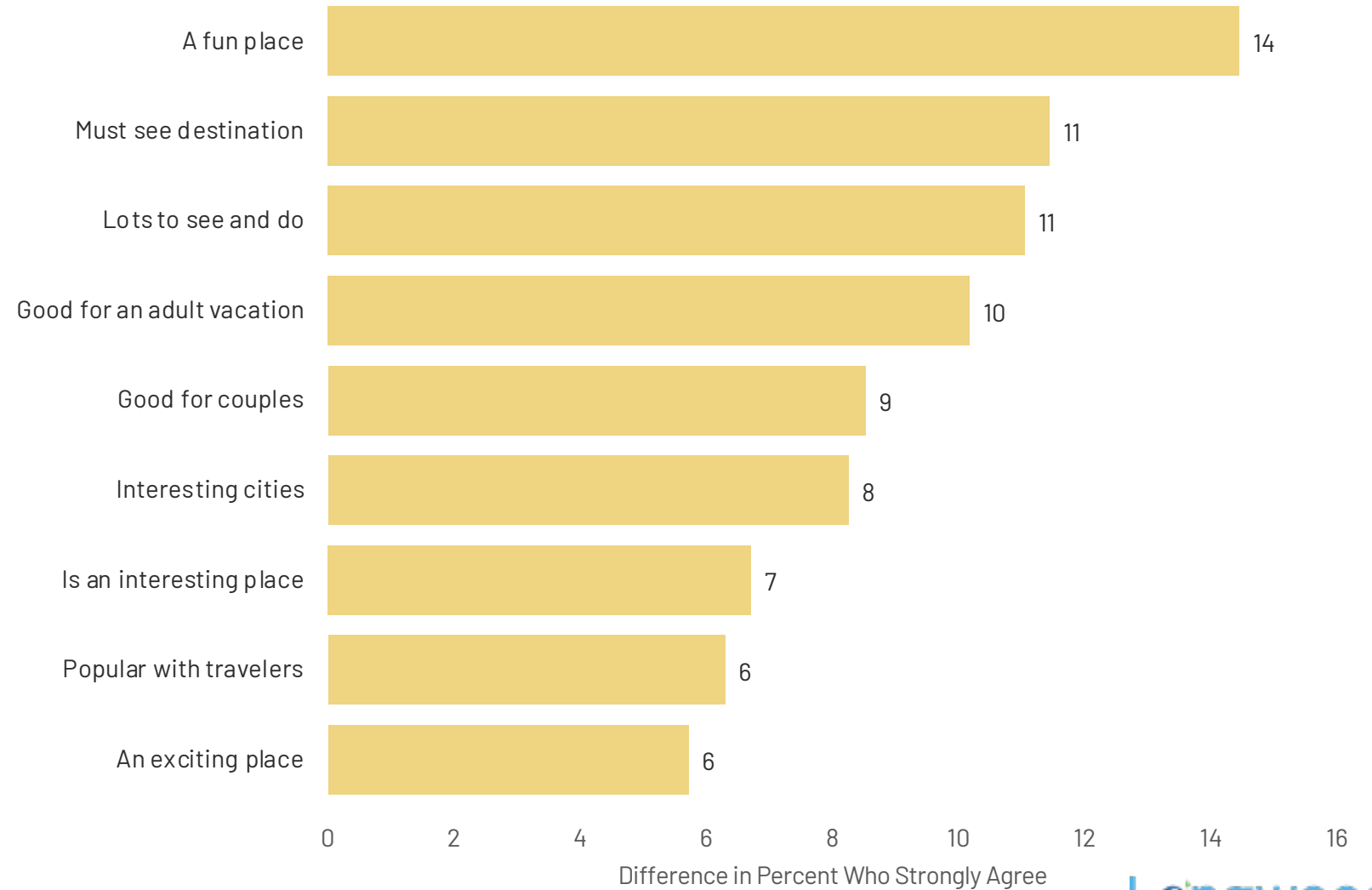
\* Visited in the past 2 years

# TOP PRODUCT STRENGTHS VS IMAGE - HOT BUTTONS

Base: Total Markets

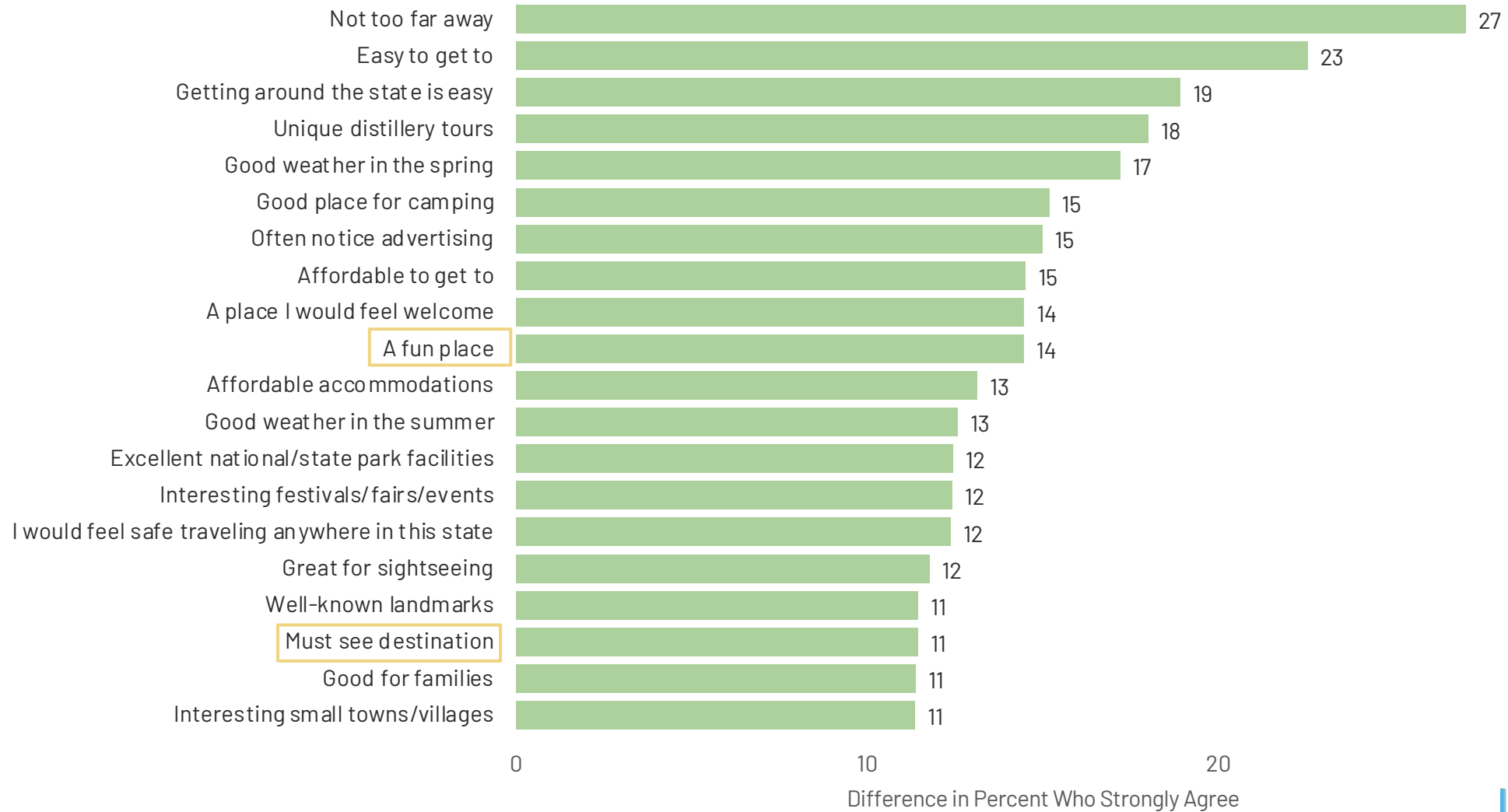


More recent Kentucky visitors than non-visitors rated the state favorably across 9 of the 10 Hot Button attributes.



# TOP PRODUCT STRENGTHS VS. IMAGE

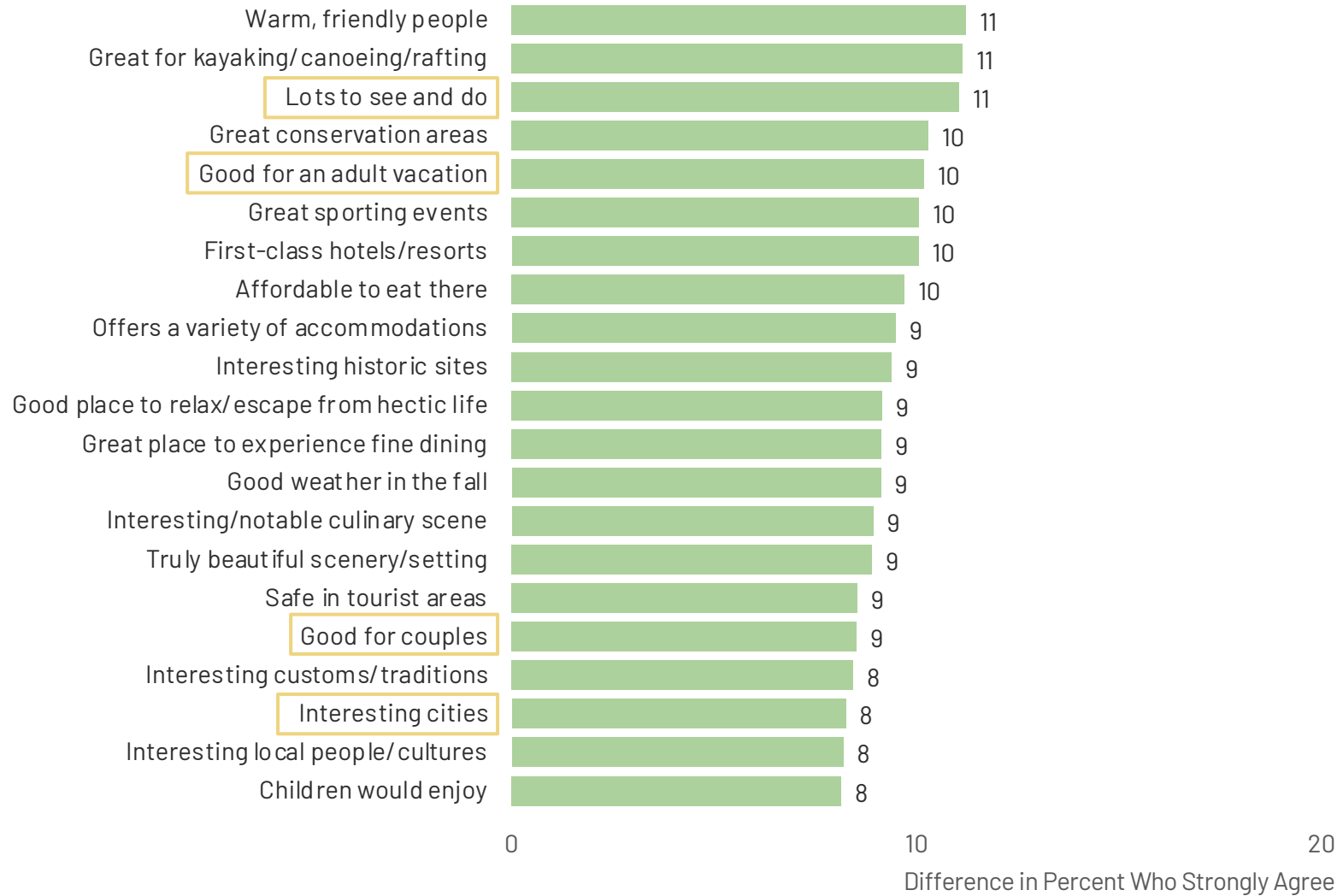
Base: Total Markets



Hot Button

# TOP PRODUCT STRENGTHS VS. IMAGE (CONT'D)

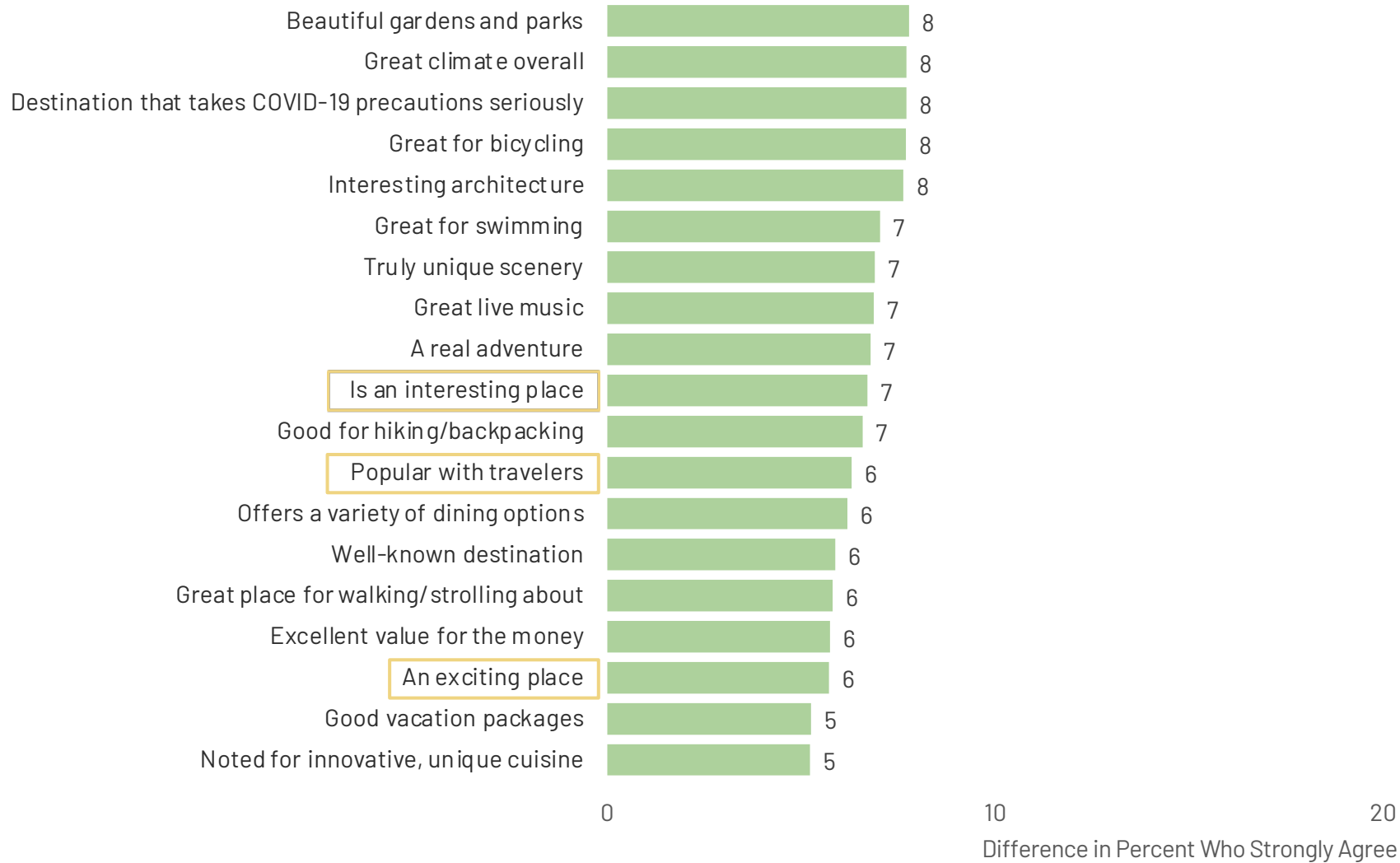
Base: Total Markets



Hot Button

# TOP PRODUCT STRENGTHS VS. IMAGE (CONT'D)

Base: Total Markets



Hot Button



Base: Total Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED PRODUCT  
WEAKNESSES VS. IMAGE

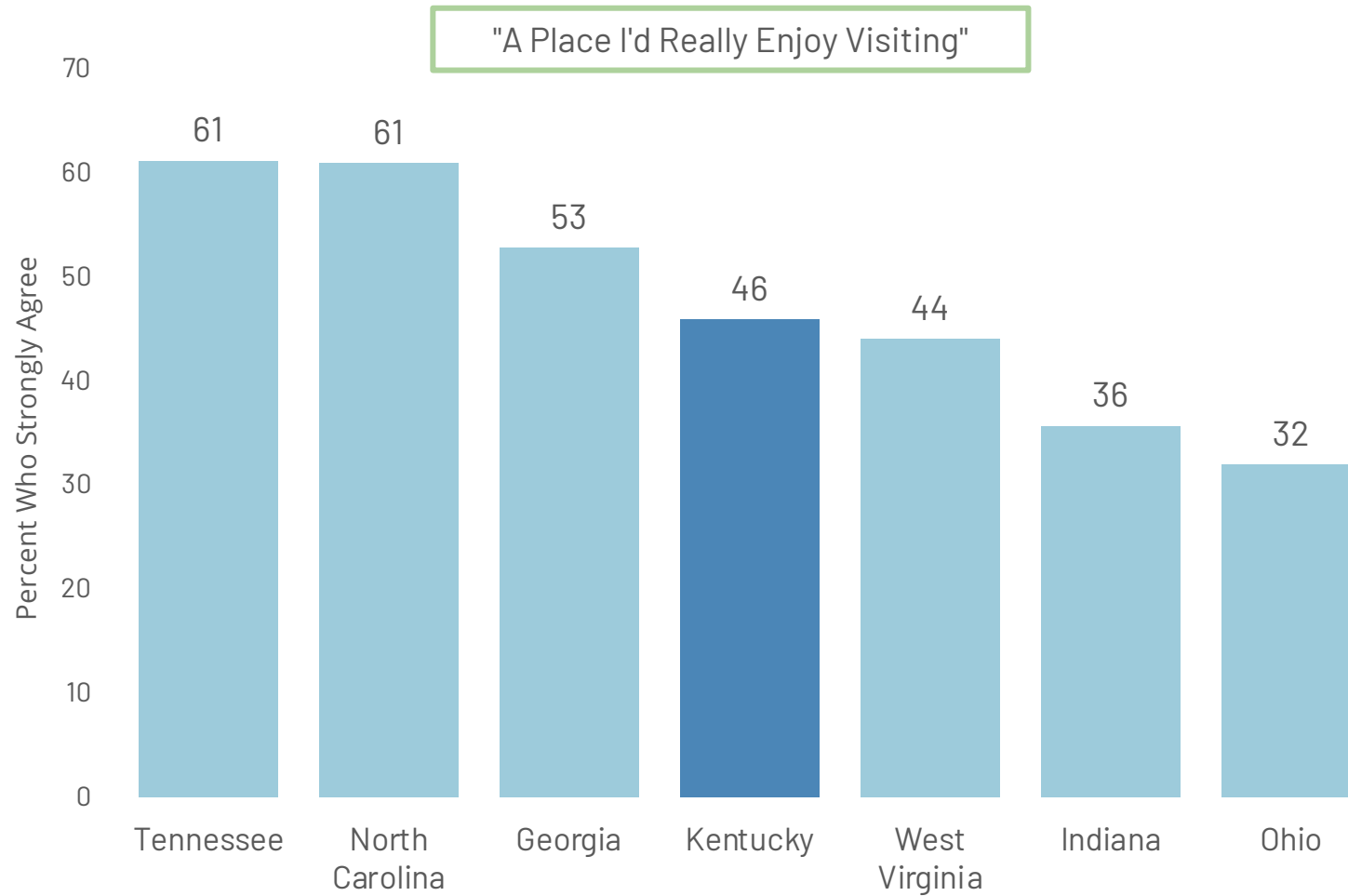


[IMAGE VS. THE COMPETITION]

TEAM  KENTUCKY®

# OVERALL IMAGE VS. COMPETITION

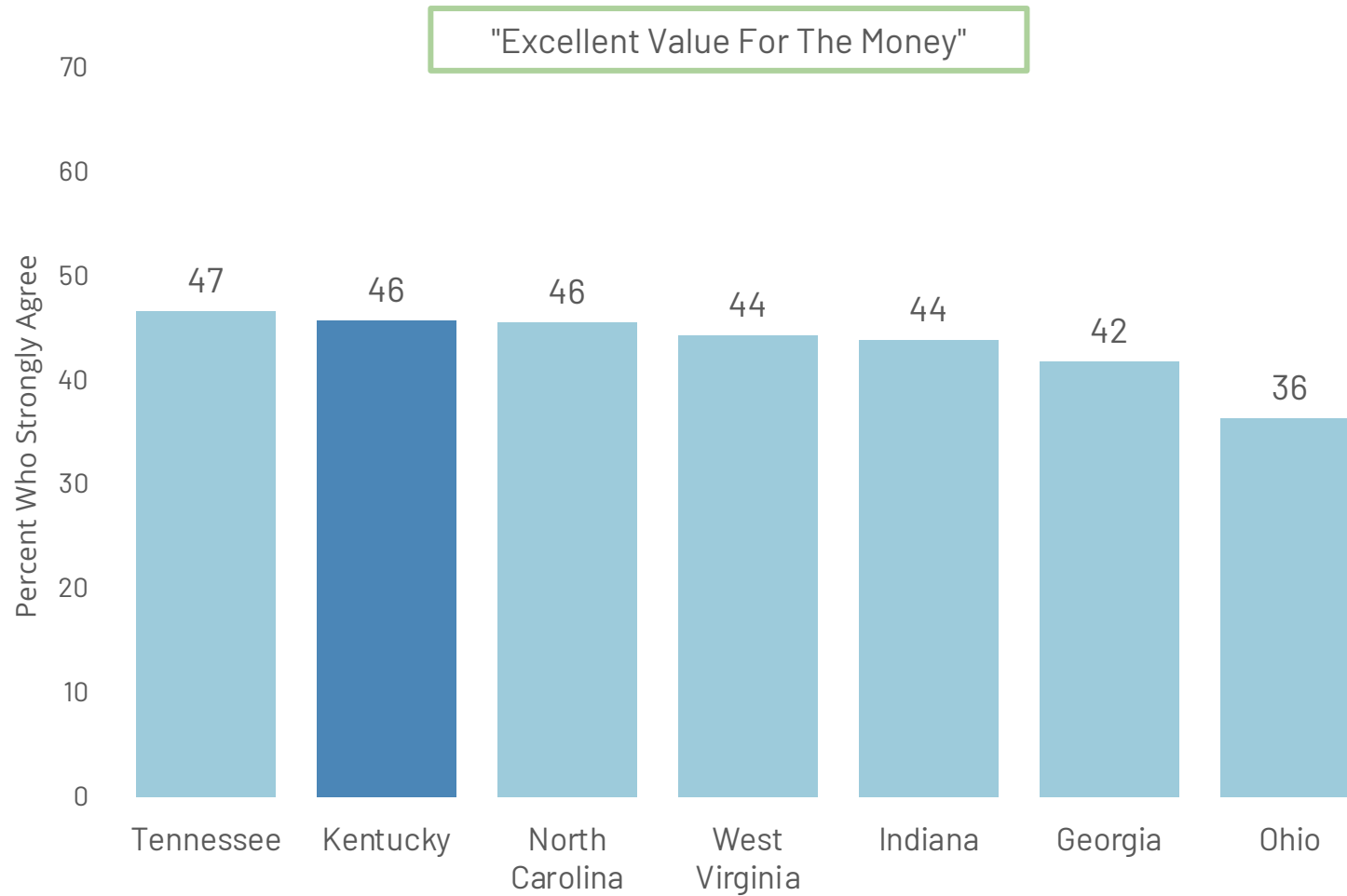
Base: Total Markets



Relative to the other destinations in the competitive set for this study, Kentucky is relatively competitive against most of the states included in this analysis. Across the markets surveyed, almost half rated Kentucky very favorably as a destination they “would really enjoy visiting.” Kentucky is ahead of Indiana and Ohio, tied with West Virginia, and behind Tennessee, North Carolina, and Georgia.

# OVERALL IMAGE VS. COMPETITION

Base: Total Markets



"Excellent Value For The Money"

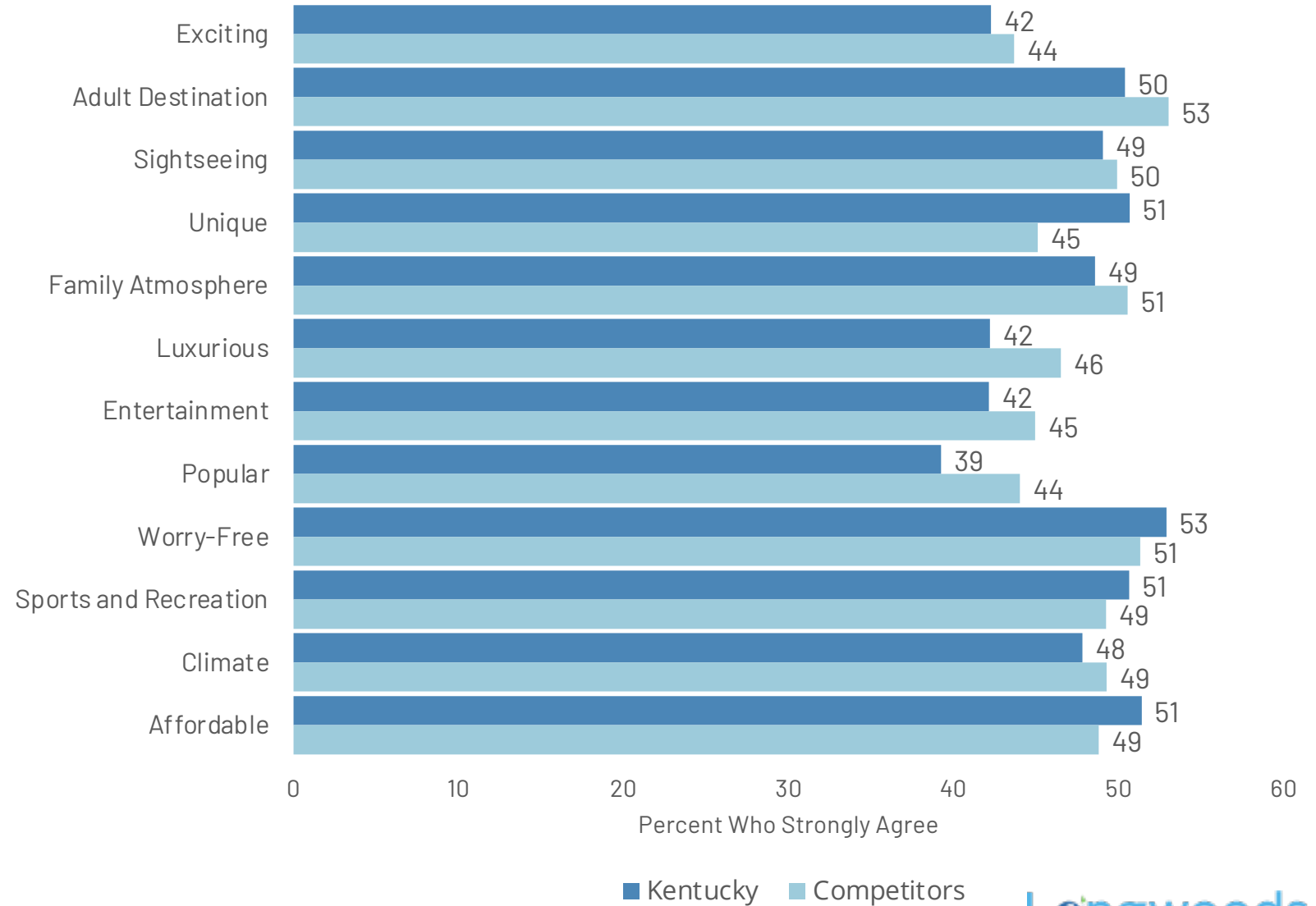
When it comes to perceptions of a trip there being excellent value for the money, Kentucky is tied for first with Tennessee, North Carolina, West Virginia, and Indiana. Georgia and Ohio trail.

# OVERALL IMAGE VS. COMPETITION

Base: Total Markets

When looking at the Travel Motivator categories, it is clear Kentucky is evenly matched with the combined competitive set, and statistically tied in most categories.

Kentucky is ahead of the competitive set on Unique, but behind on Luxurious and Popular.



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

# IMAGE VS. COMPETITION - EXCITING

Base: Total Markets



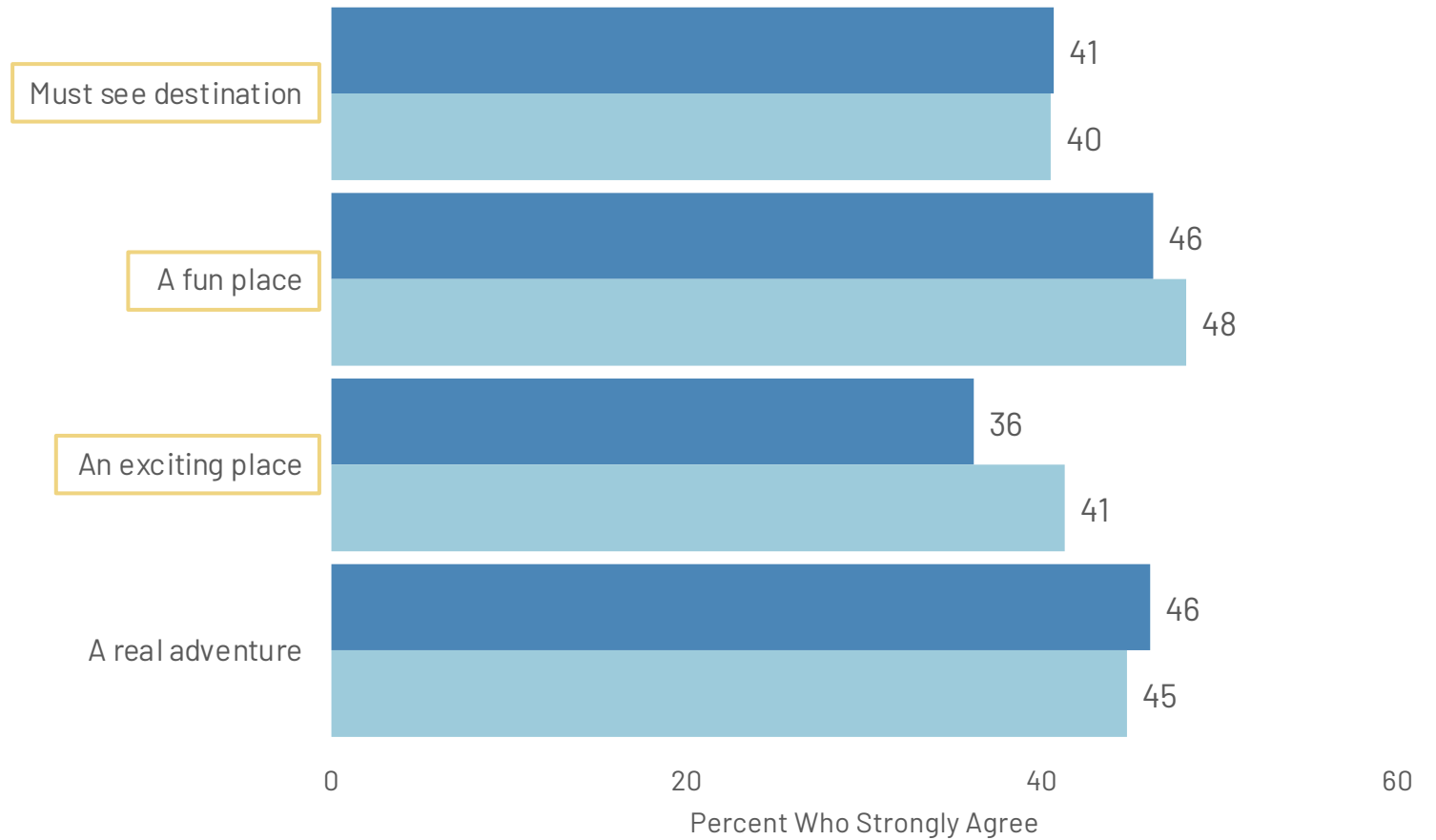
EXCITING

Kentucky\*

42

Competitors\*

44

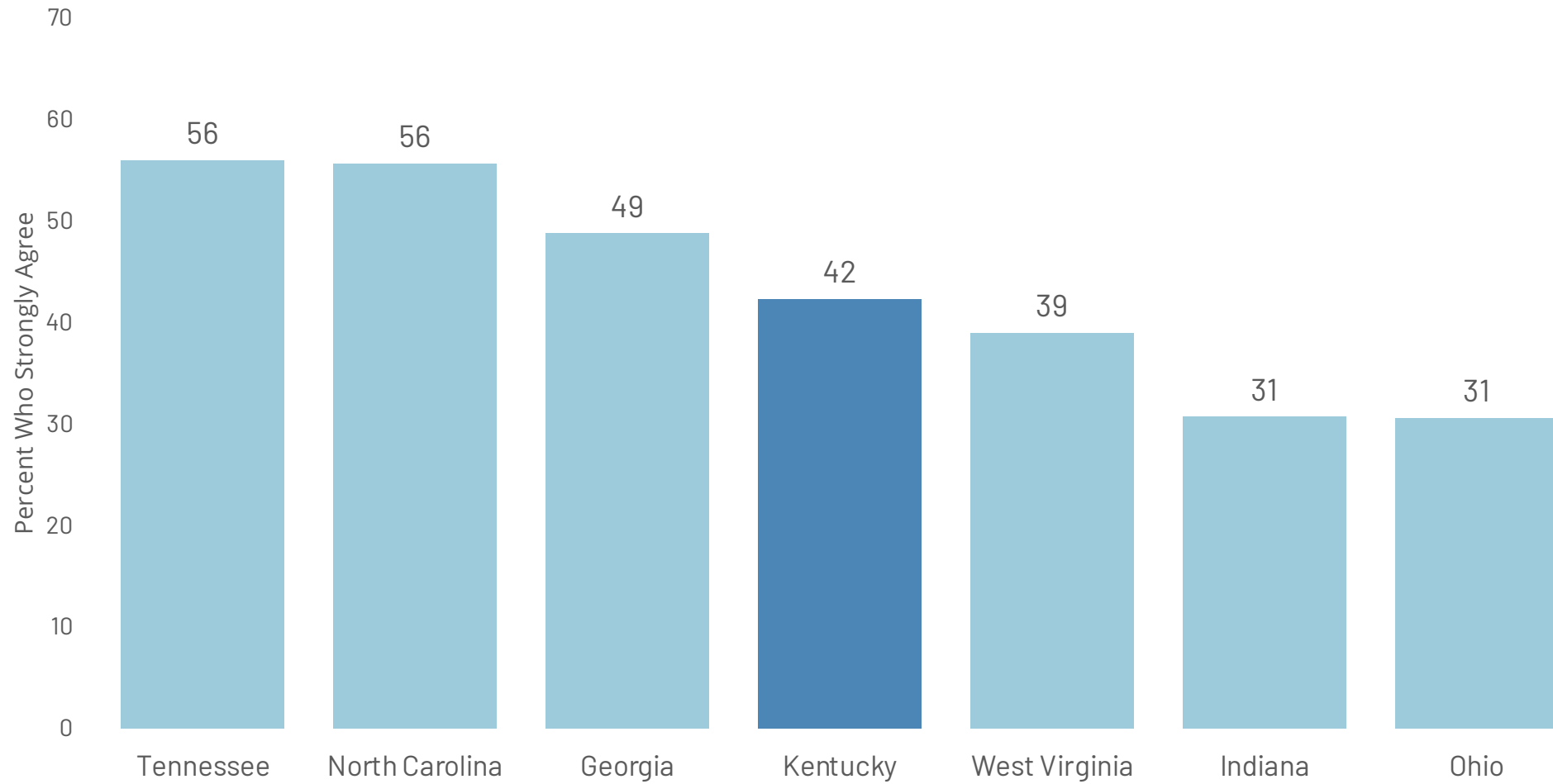


Hot Button

\*Percent who strongly agree

# IMAGE VS. COMPETITION - EXCITING

Base: Total Markets



# IMAGE VS. COMPETITION - ADULT DESTINATION

Base: Total Markets



## ADULT DESTINATION

Kentucky\*

50

Competitors\*

53

Good for an adult vacation

51

53

Good for couples

49

53

0 20 40 60

Percent Who Strongly Agree

■ Kentucky ■ Competitors

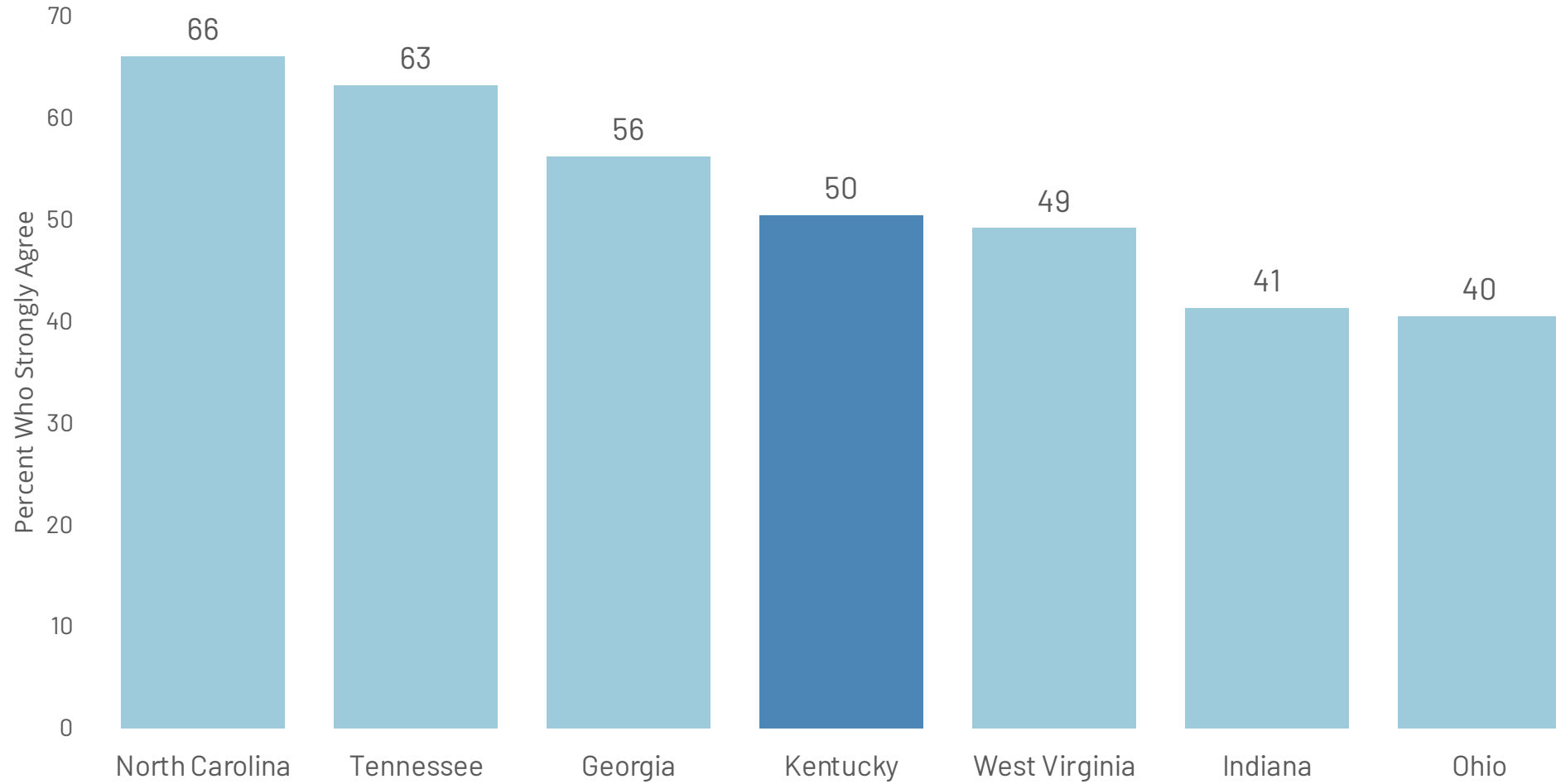
Hot Button

\*Percent who strongly agree

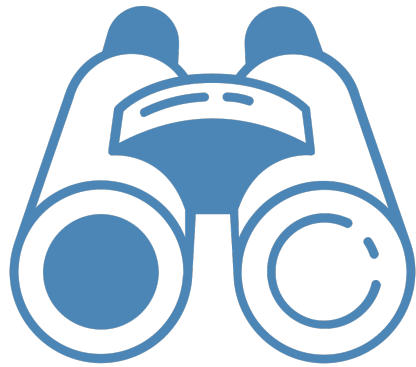


# IMAGE VS. COMPETITION - ADULT DESTINATION

Base: Total Markets



# IMAGE VS. COMPETITION - SIGHTSEEING



## SIGHTSEEING

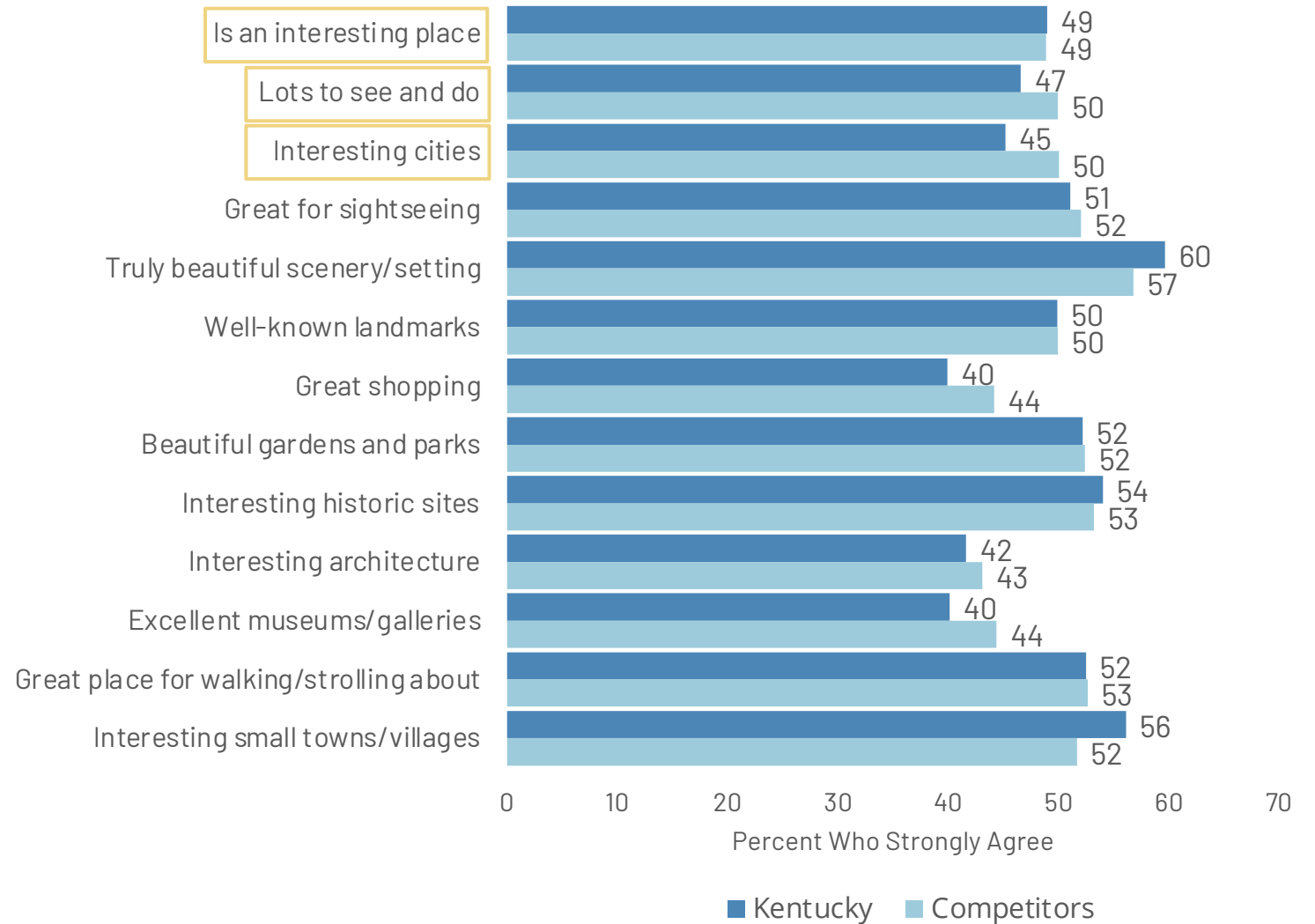
Kentucky\*

49

Competitors\*

50

Base: Total Markets

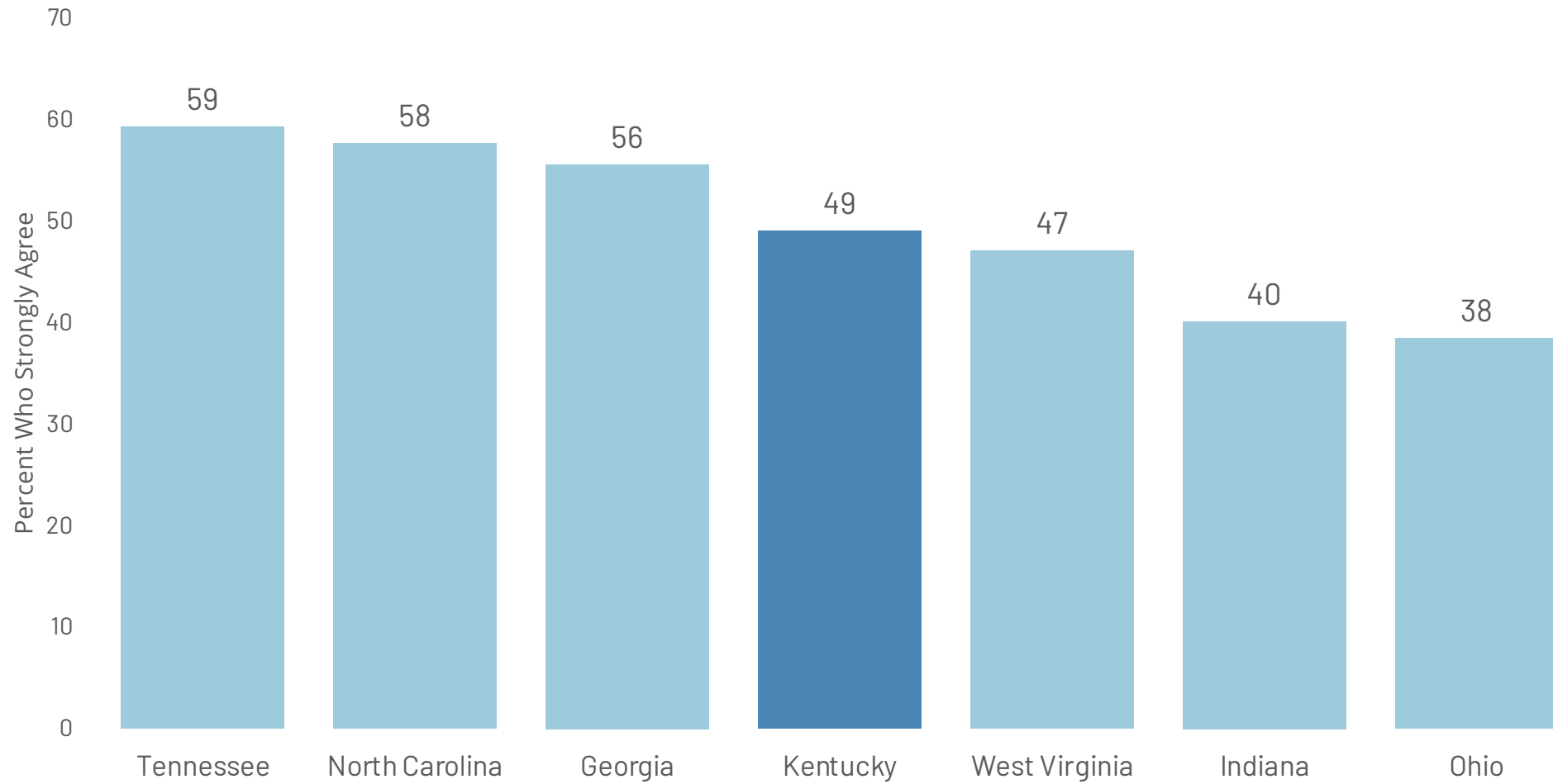


Hot Button

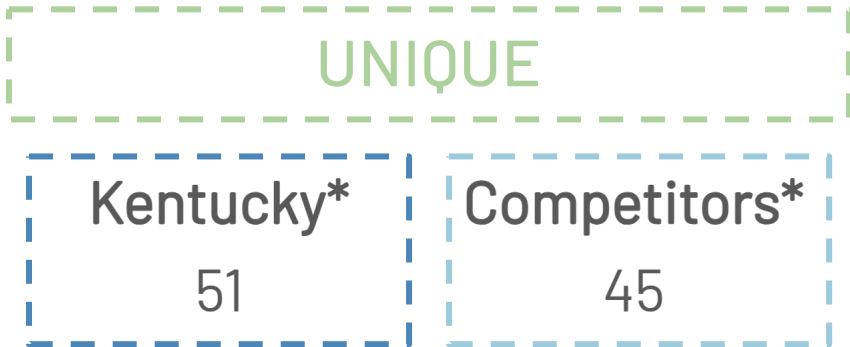
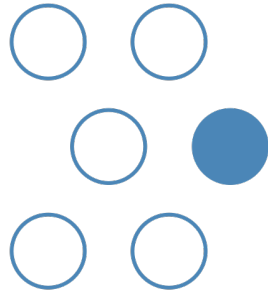
\*Percent who strongly agree

# IMAGE VS. COMPETITION - SIGHTSEEING

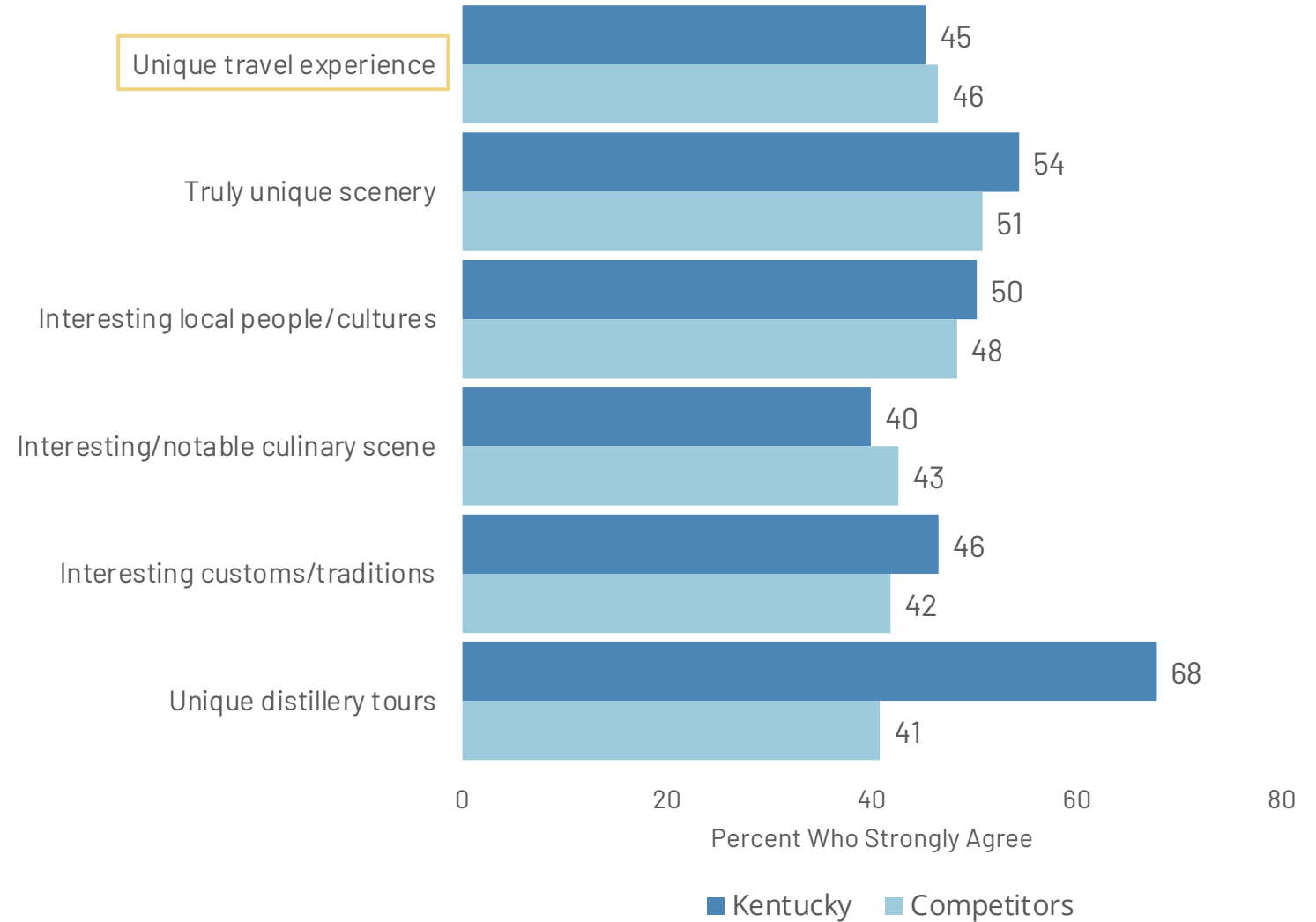
Base: Total Markets



# IMAGE VS. COMPETITION - UNIQUE



Base: Total Markets

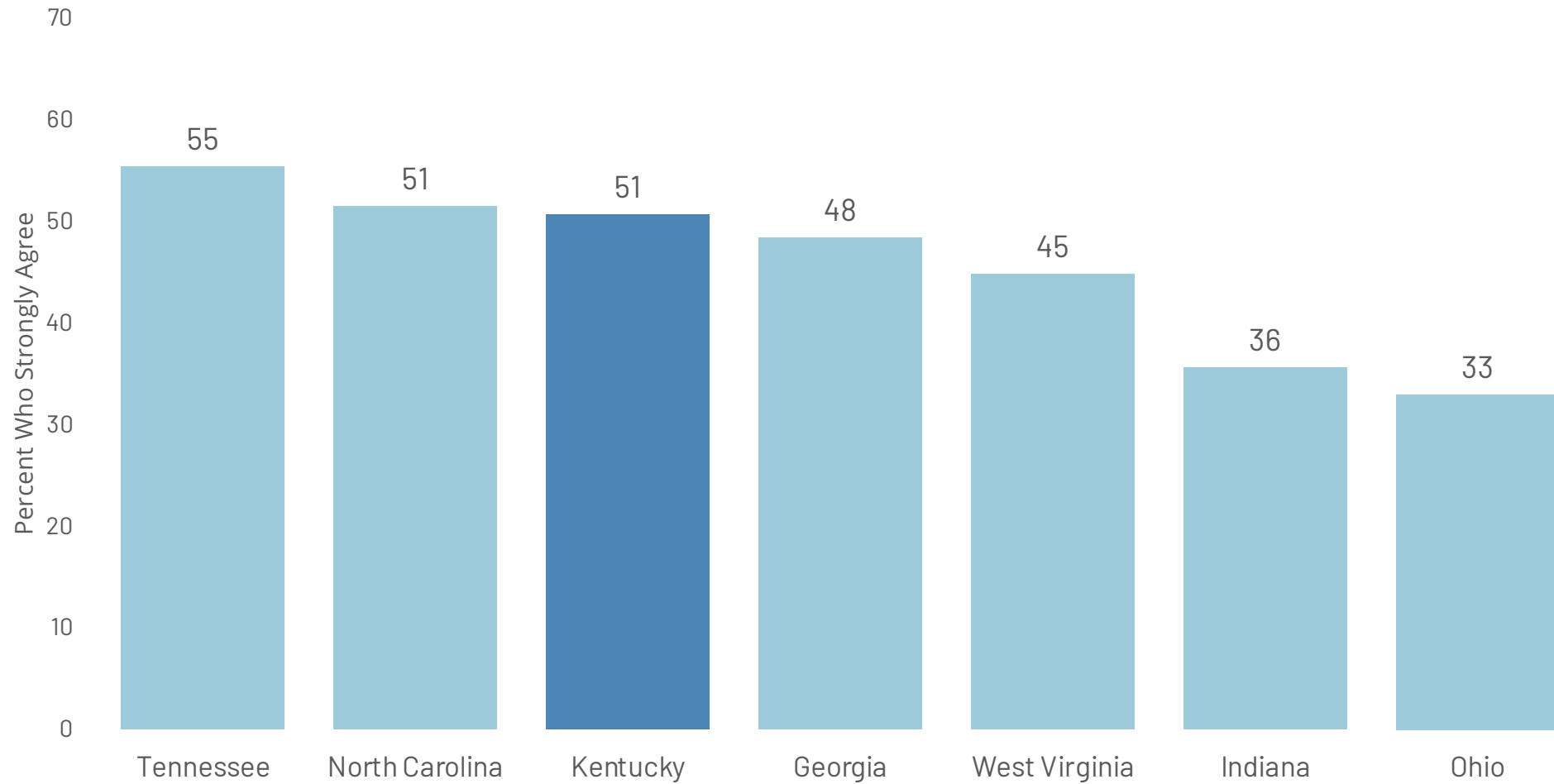


Hot Button

\*Percent who strongly agree

# IMAGE VS. COMPETITION - UNIQUE

Base: Total Markets



# IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

Base: Total Markets



## FAMILY ATMOSPHERE

Kentucky\*

49

Competitors\*

51

Children would enjoy

45

47

Good for families

53

54

0

20

40

60

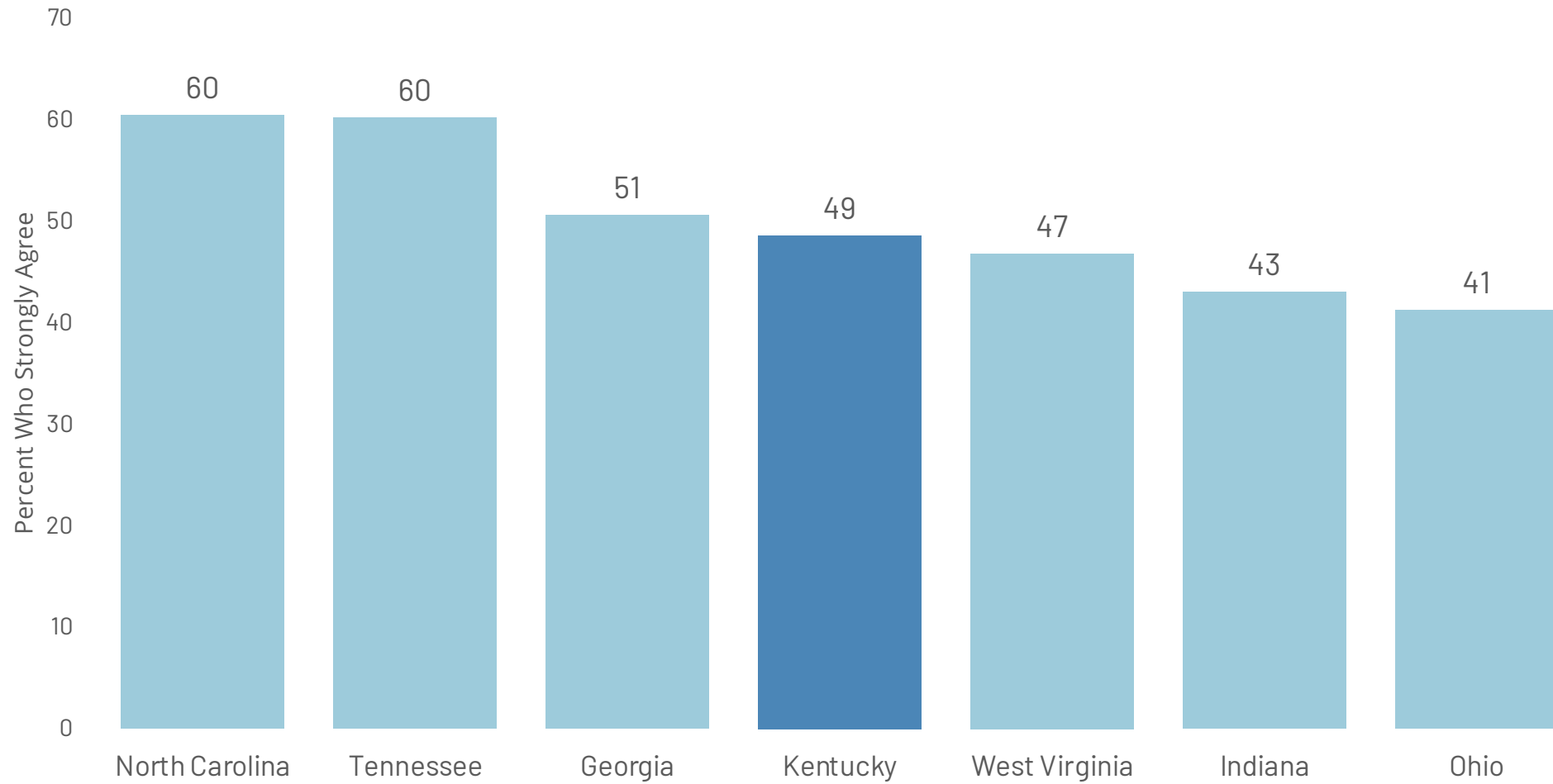
Percent Who Strongly Agree

■ Kentucky ■ Competitors

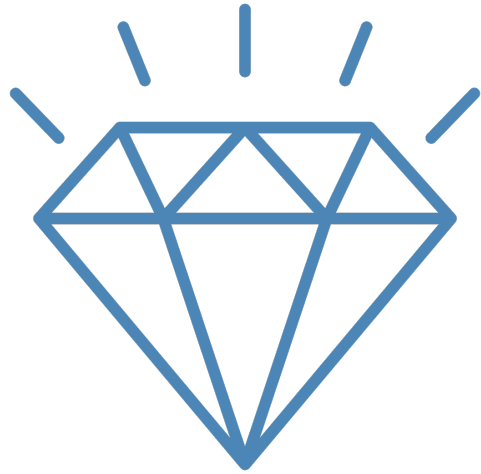
\*Percent who strongly agree

# IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

Base: Total Markets



# IMAGE VS. COMPETITION - LUXURIOUS



LUXURIOUS

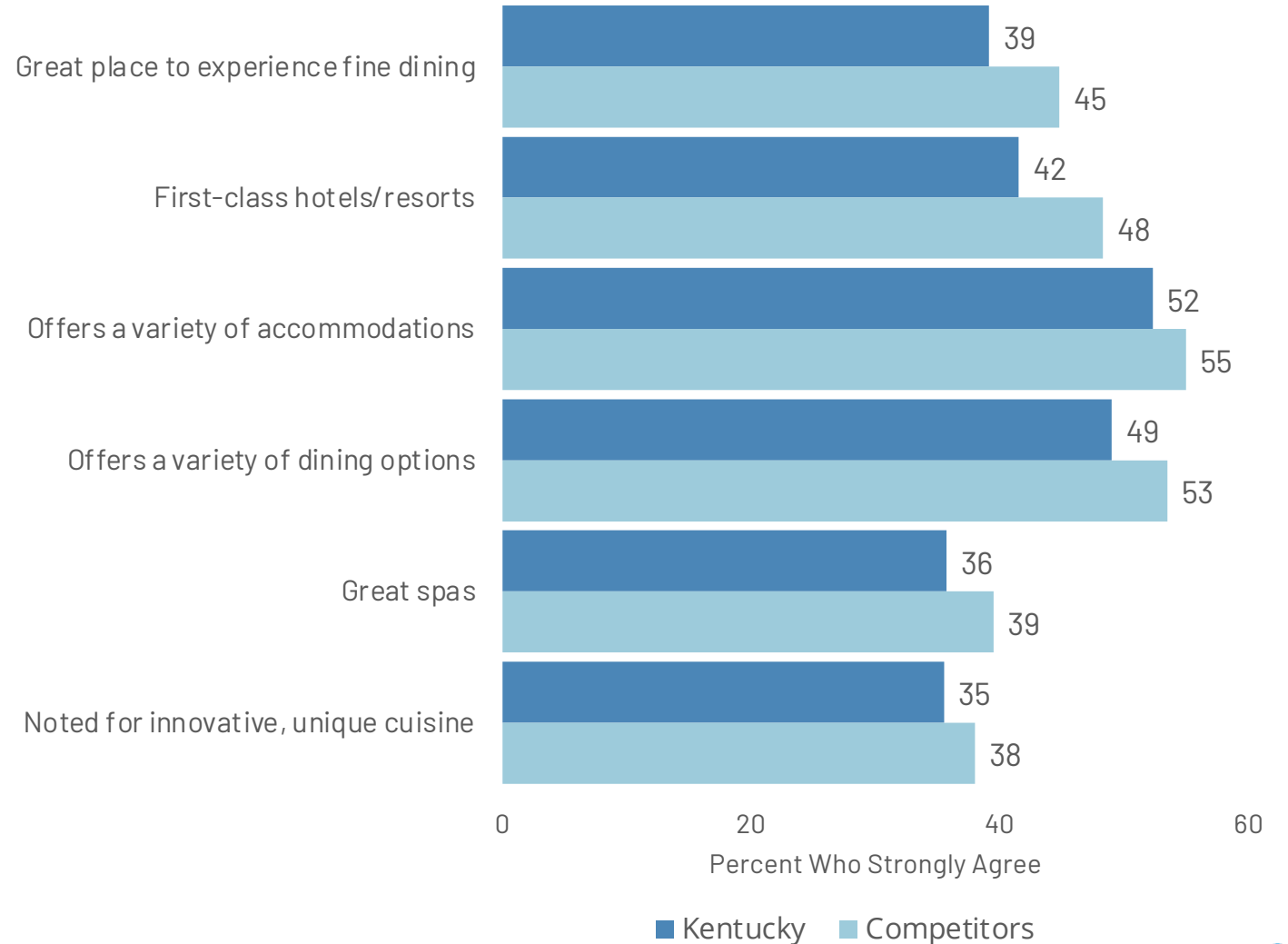
Kentucky\*

42

Competitors\*

46

Base: Total Markets

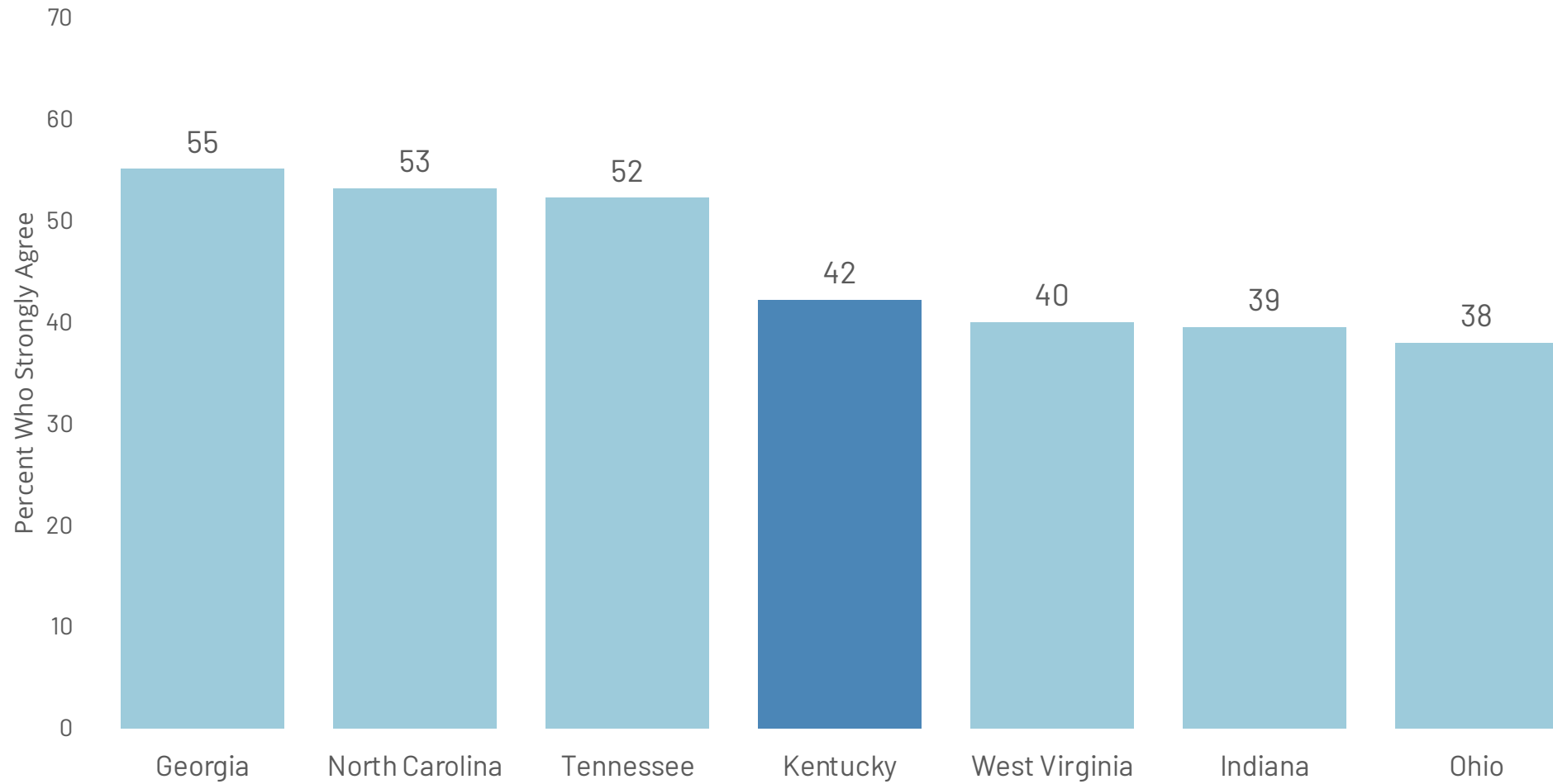


\*Percent who strongly agree



# IMAGE VS. COMPETITION - LUXURIOUS

Base: Total Markets



# IMAGE VS. COMPETITION - ENTERTAINMENT



## ENTERTAINMENT

Kentucky\*

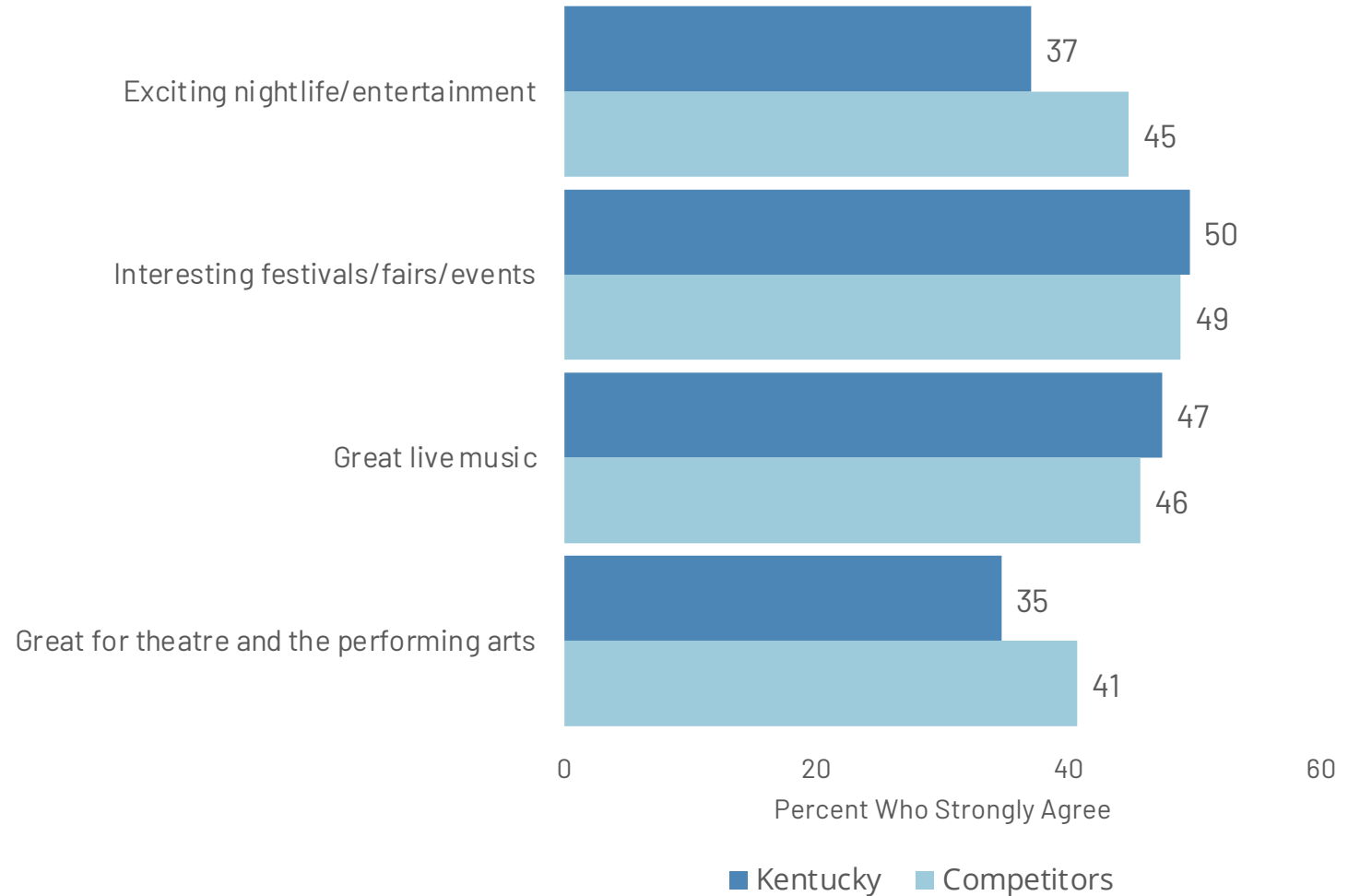
42

Competitors\*

45

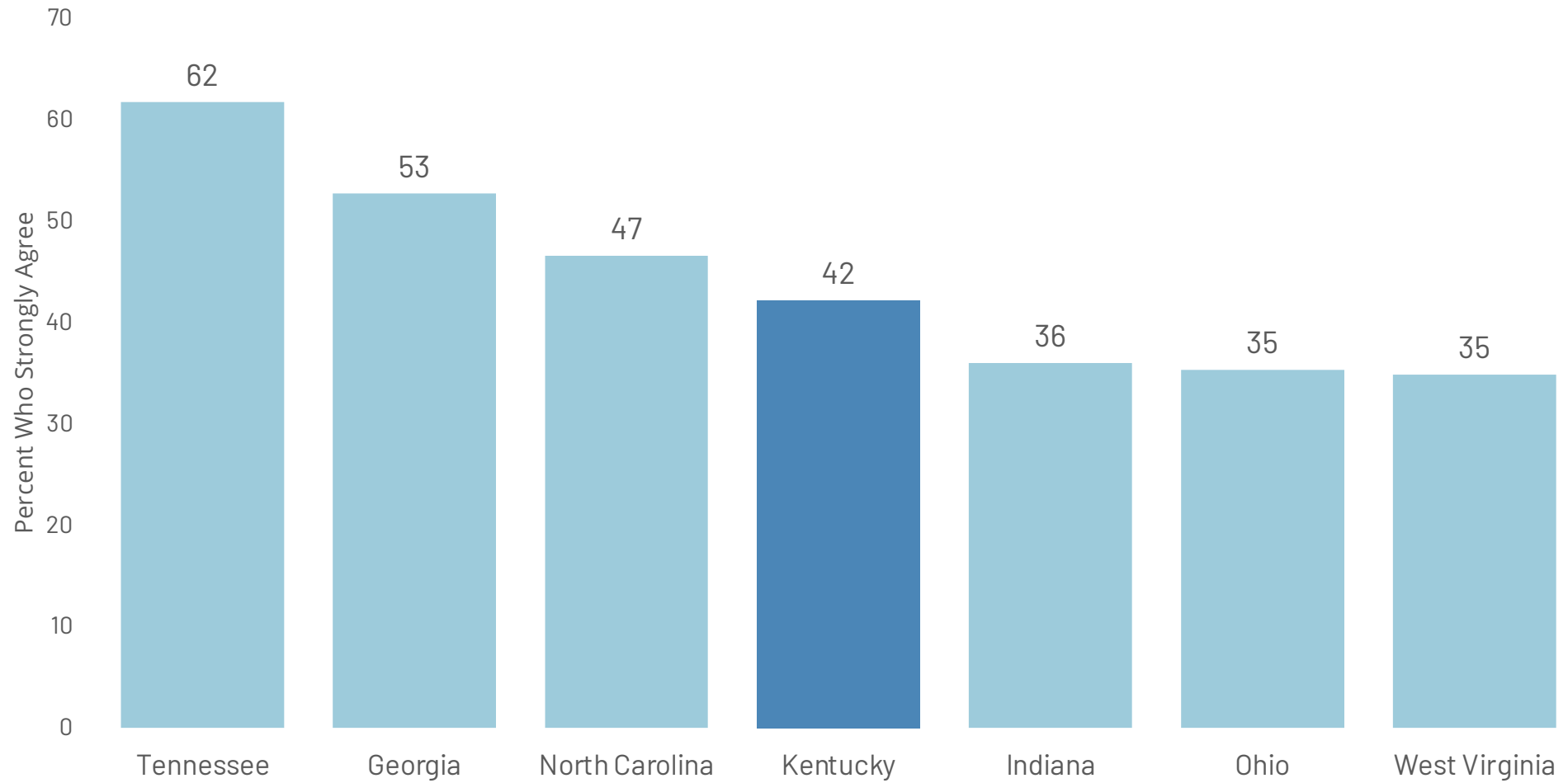
\*Percent who strongly agree

Base: Total Markets



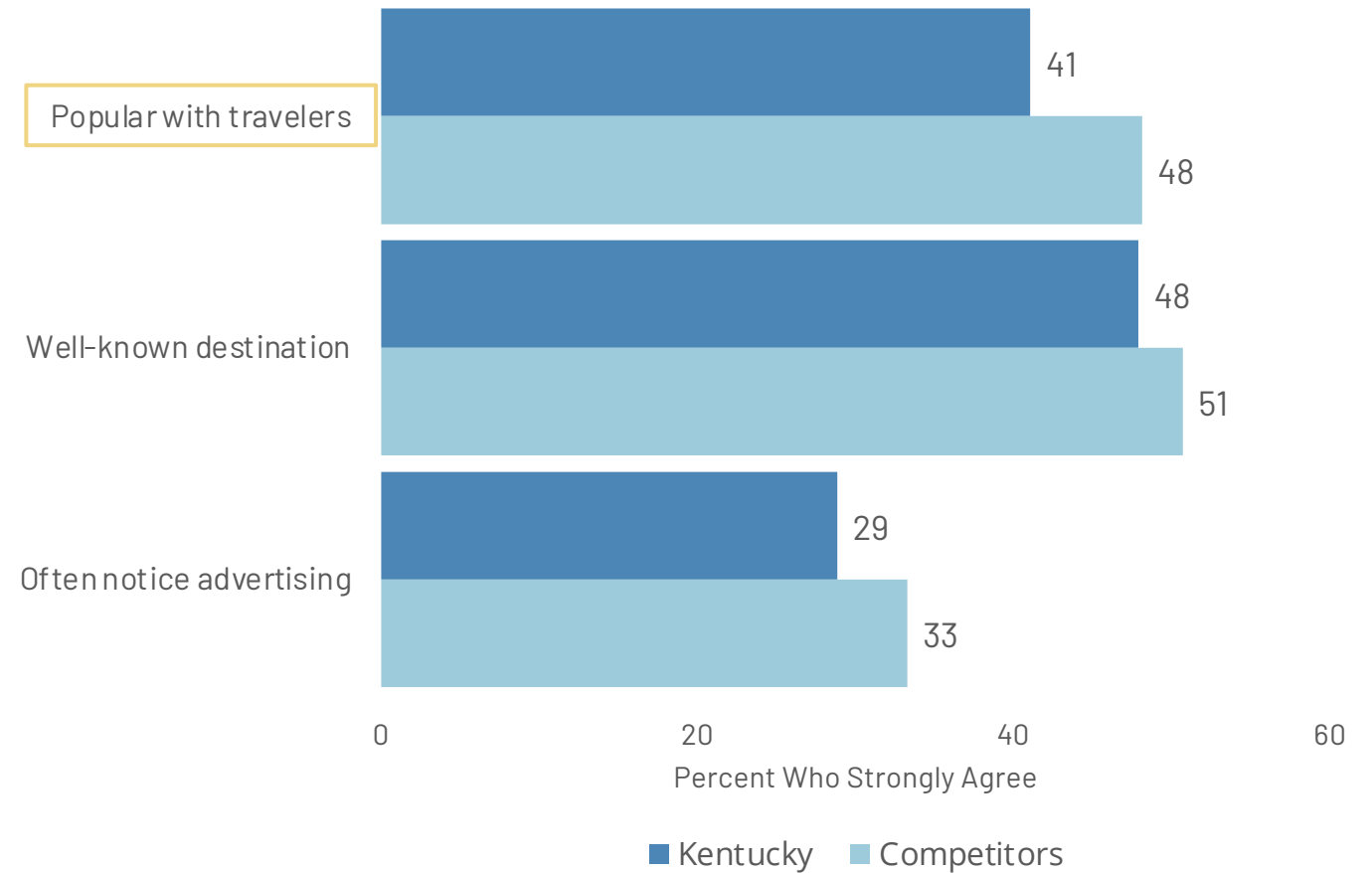
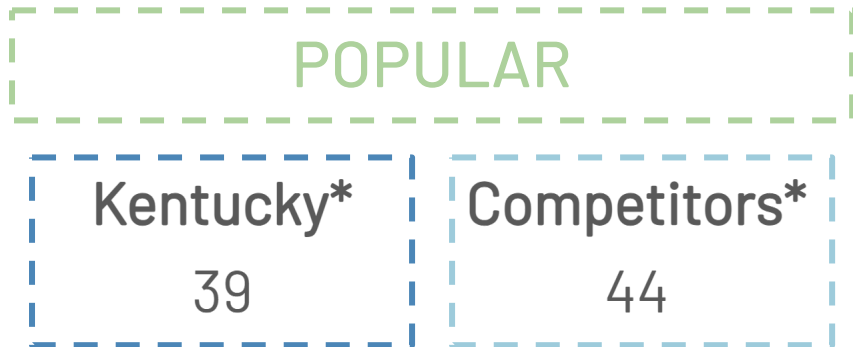
# IMAGE VS. COMPETITION - ENTERTAINMENT

Base: Total Markets



# IMAGE VS. COMPETITION - POPULAR

Base: Total Markets

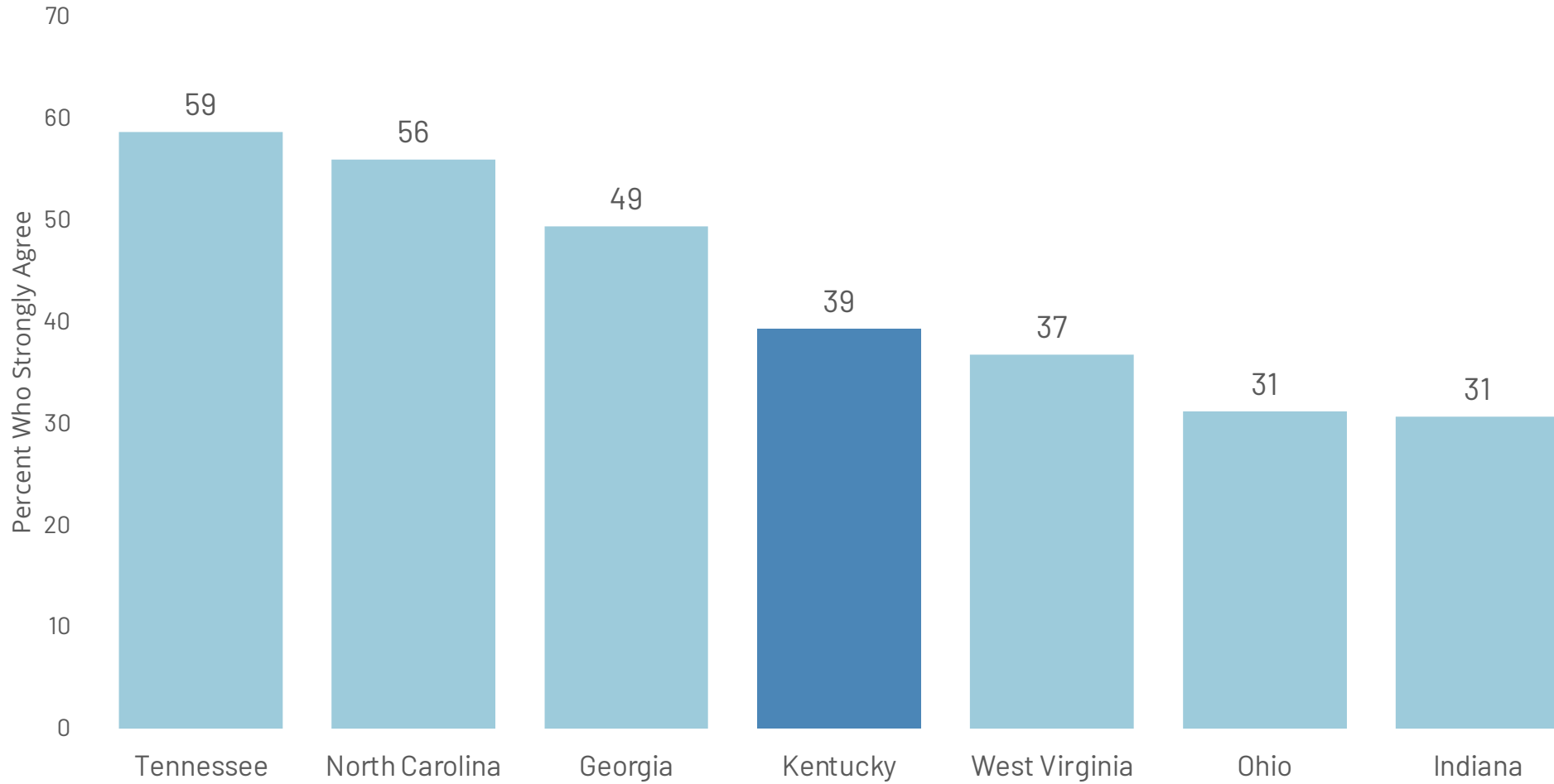


Hot Button

\*Percent who strongly agree

# IMAGE VS. COMPETITION - POPULAR

Base: Total Markets



# IMAGE VS. COMPETITION - WORRY-FREE

Base: Total Markets



WORRY-FREE

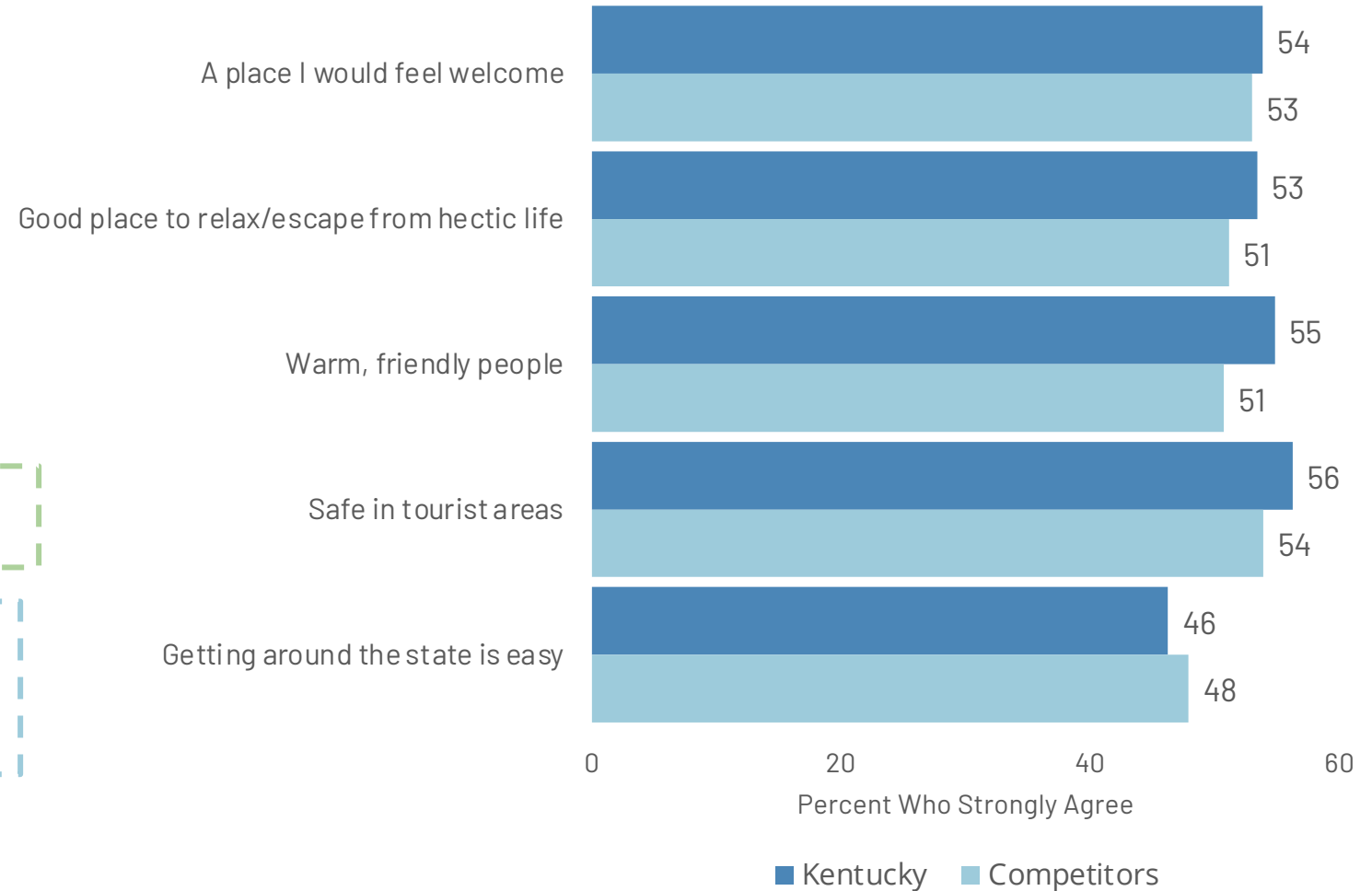
Kentucky\*

53

Competitors\*

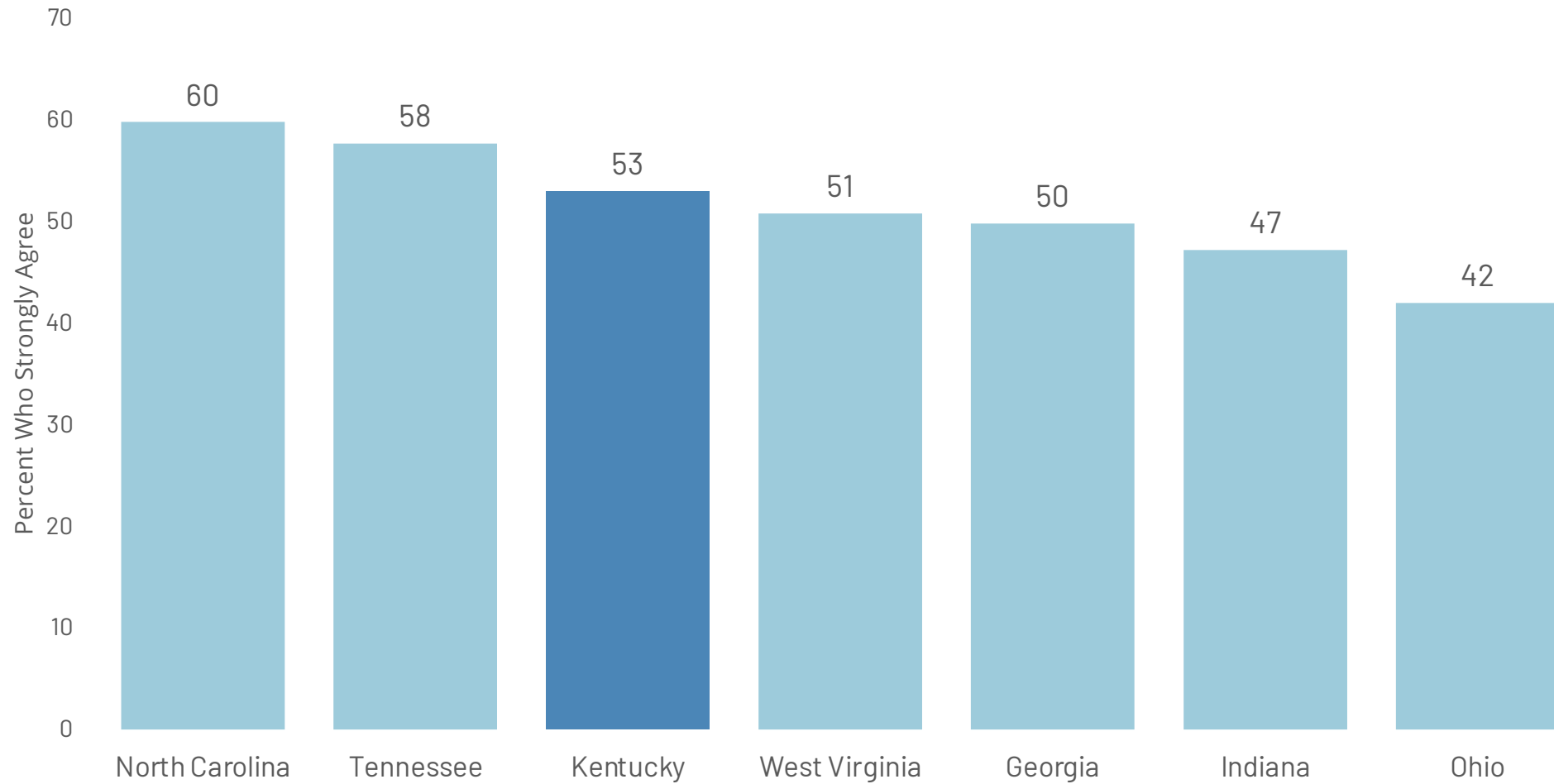
51

\*Percent who strongly agree



# IMAGE VS. COMPETITION - WORRY-FREE

Base: Total Markets



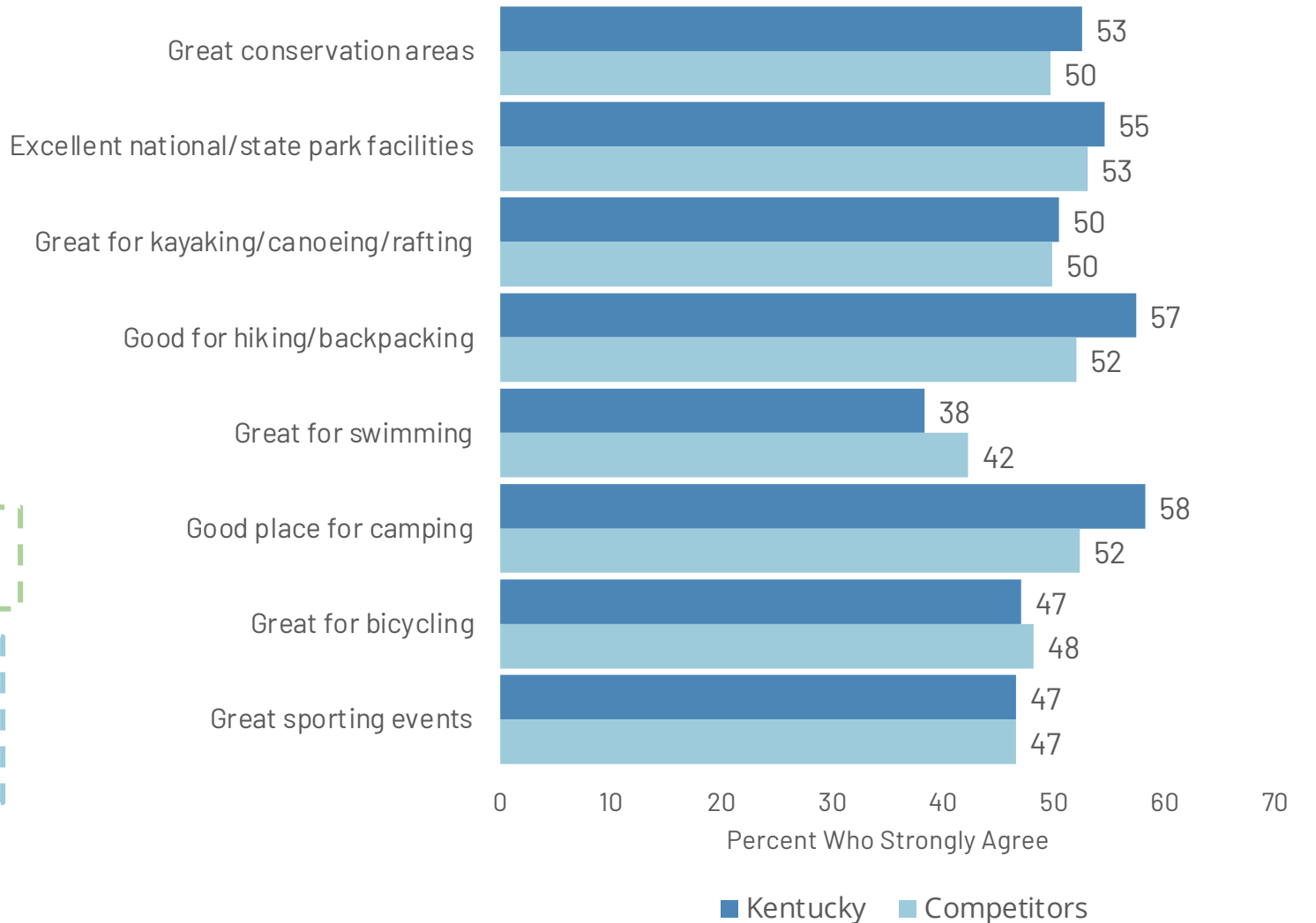
# IMAGE VS. COMPETITION - SPORTS AND RECREATION



## SPORTS AND RECREATION

<b>Kentucky*</b>	<b>Competitors*</b>
51	49

Base: Total Markets

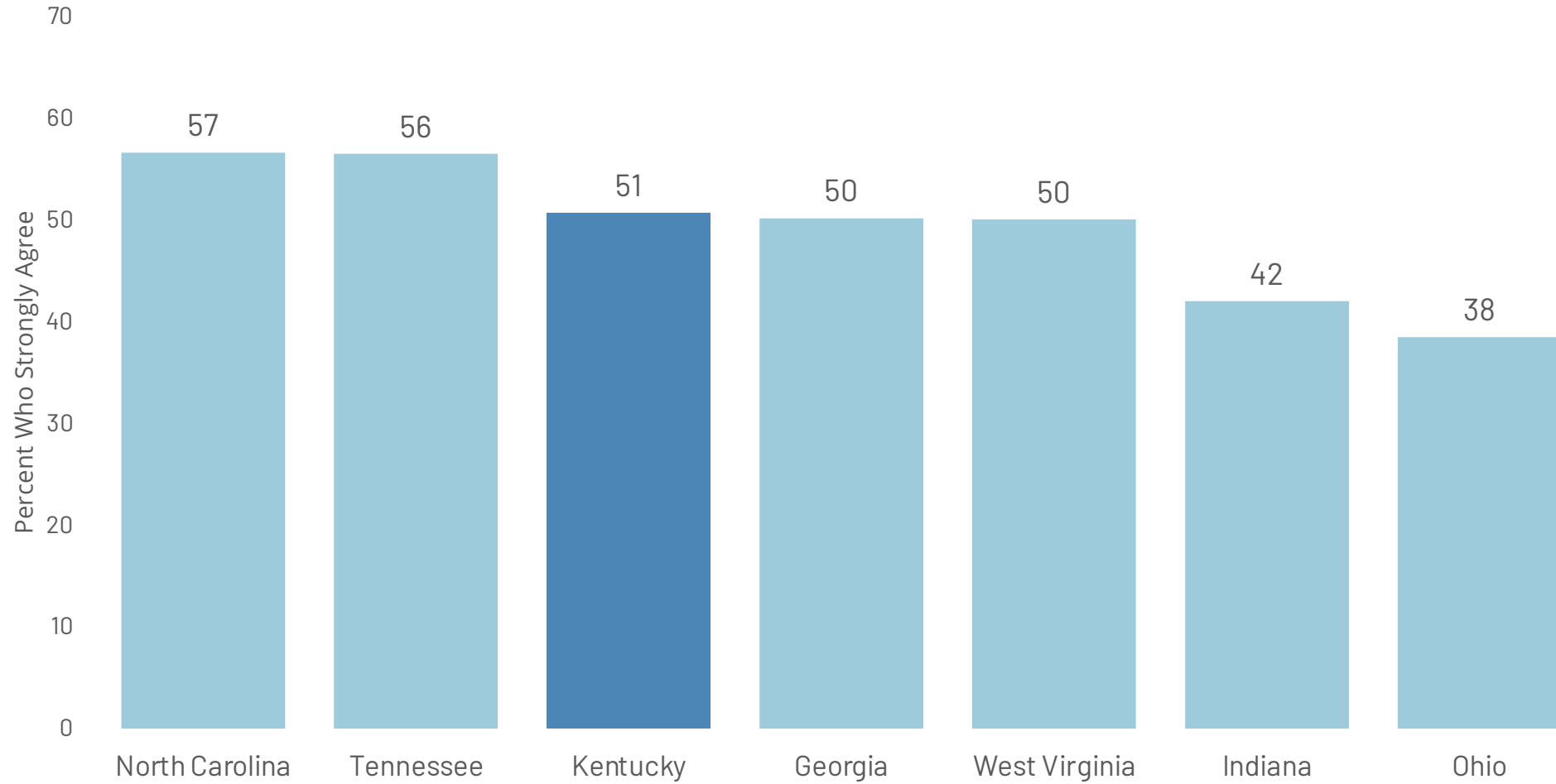


\*Percent who strongly agree



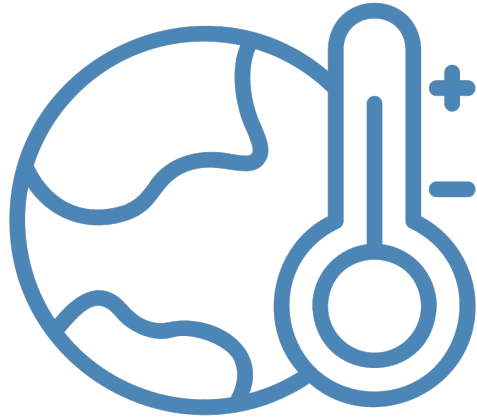
# IMAGE VS. COMPETITION - SPORTS AND RECREATION

Base: Total Markets



# IMAGE VS. COMPETITION - CLIMATE

Base: Total Markets



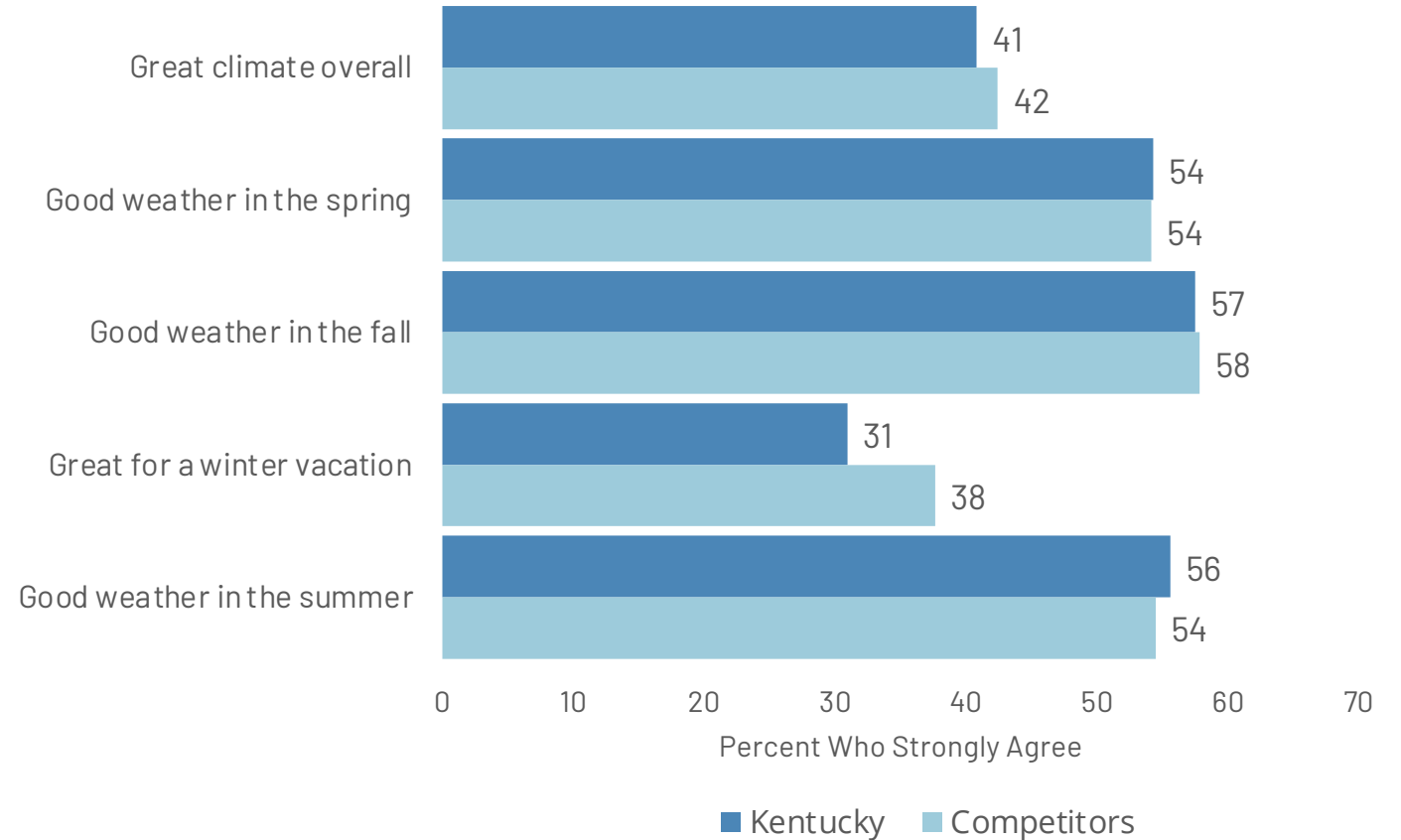
## CLIMATE

Kentucky\*

48

Competitors\*

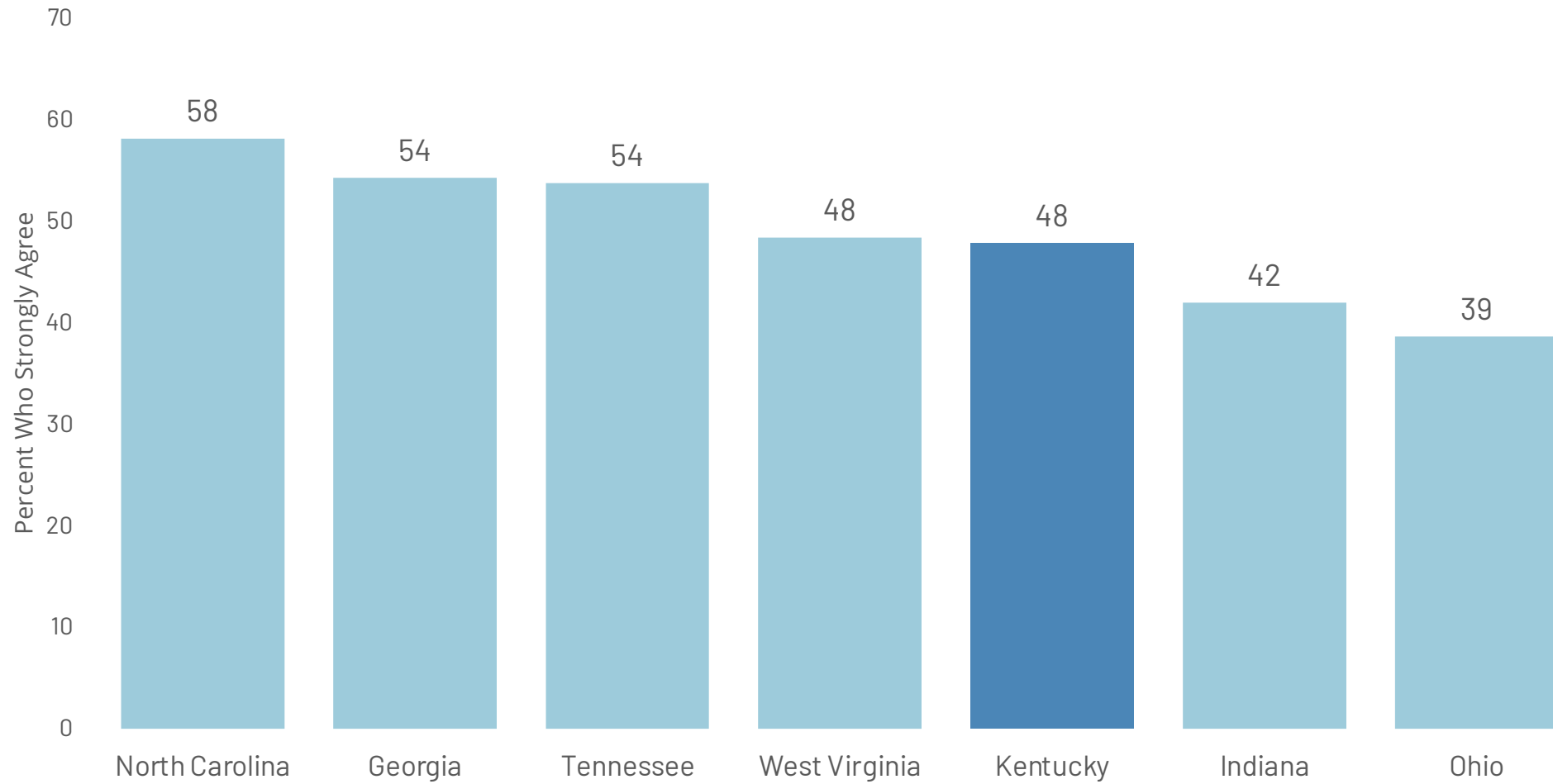
49



\*Percent who strongly agree

# IMAGE VS. COMPETITION - CLIMATE

Base: Total Markets



# IMAGE VS. COMPETITION - AFFORDABLE

Base: Total Markets



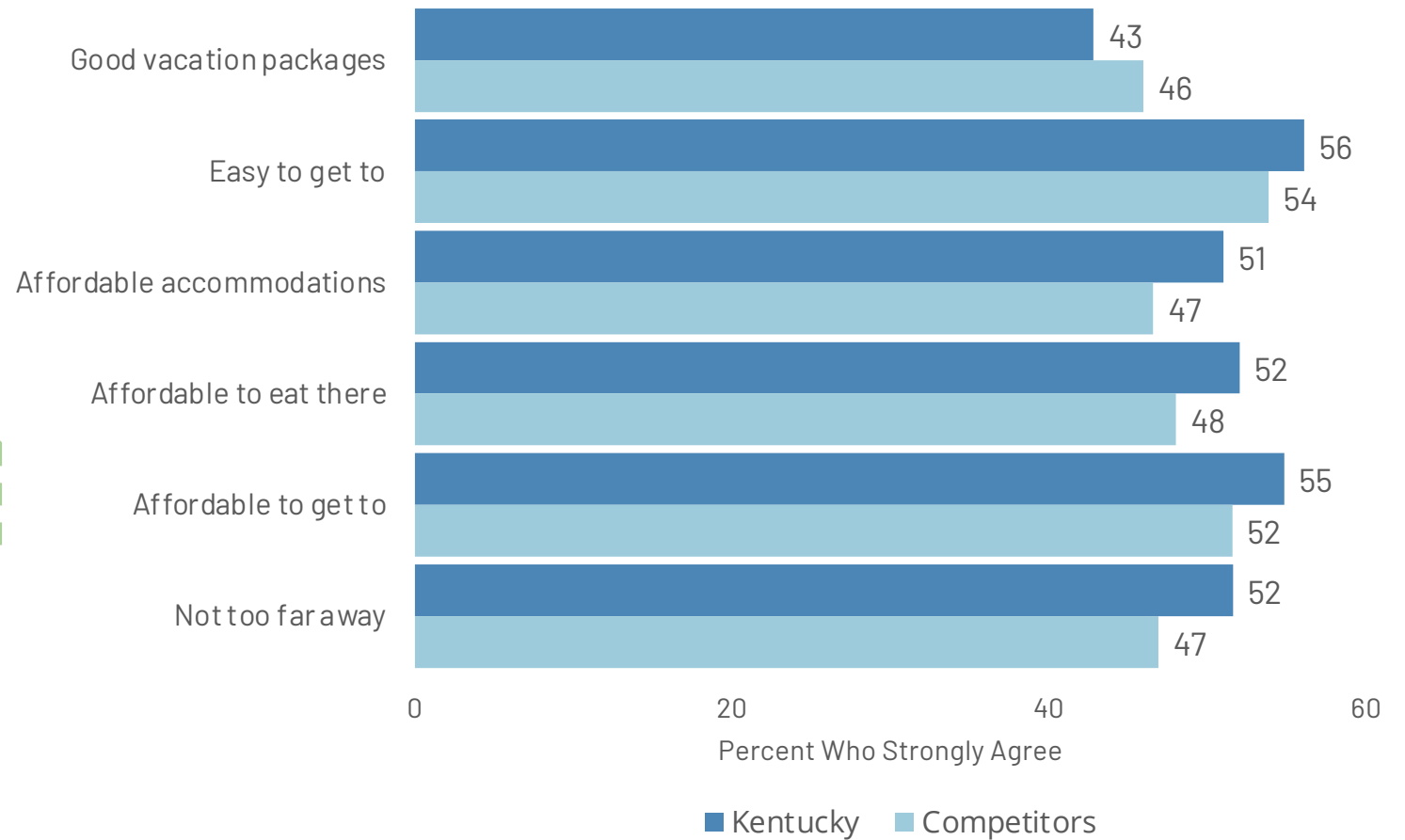
AFFORDABLE

Kentucky\*

51

Competitors\*

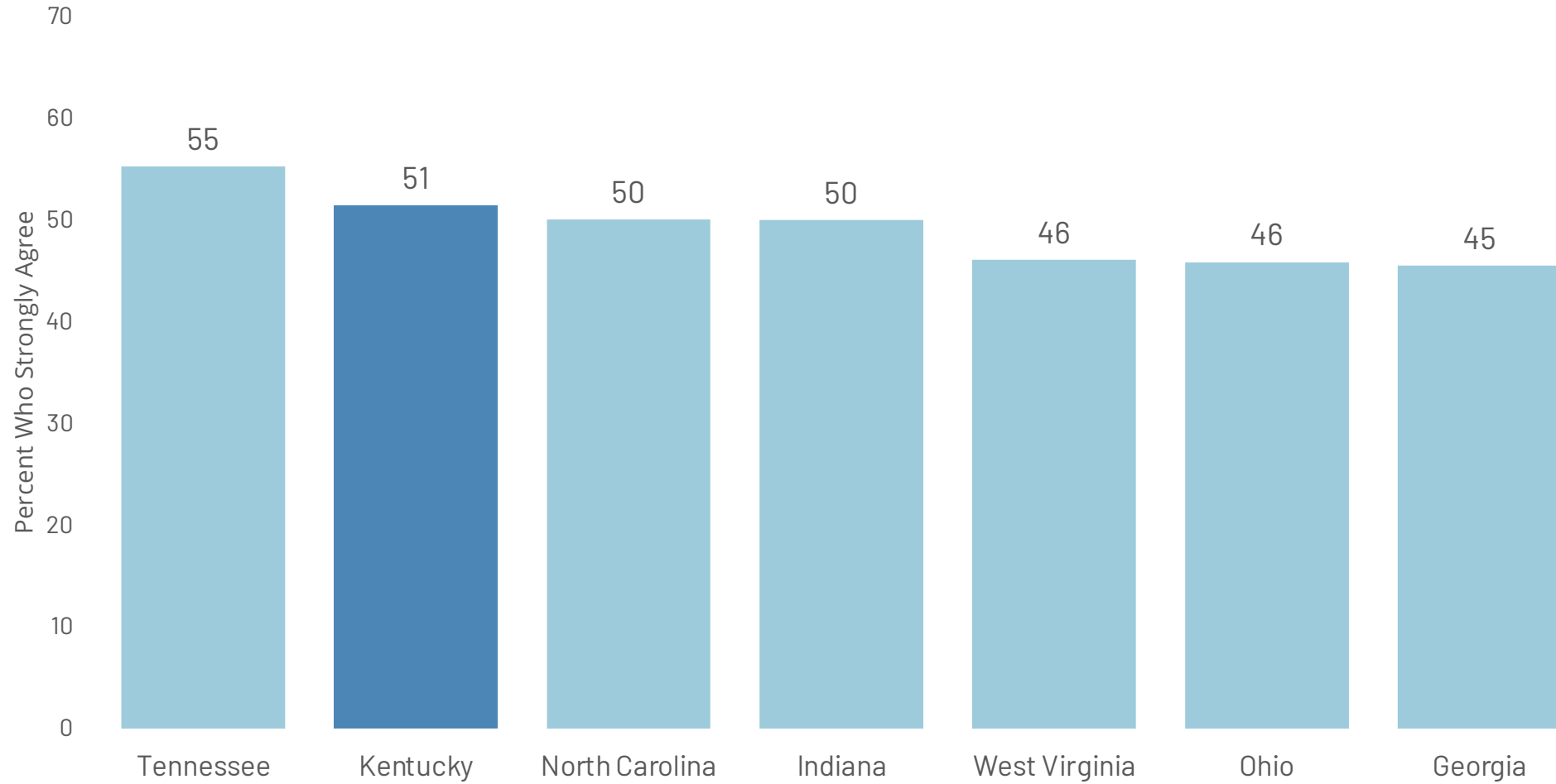
49



\*Percent who strongly agree

# IMAGE VS. COMPETITION - AFFORDABLE

Base: Total Markets

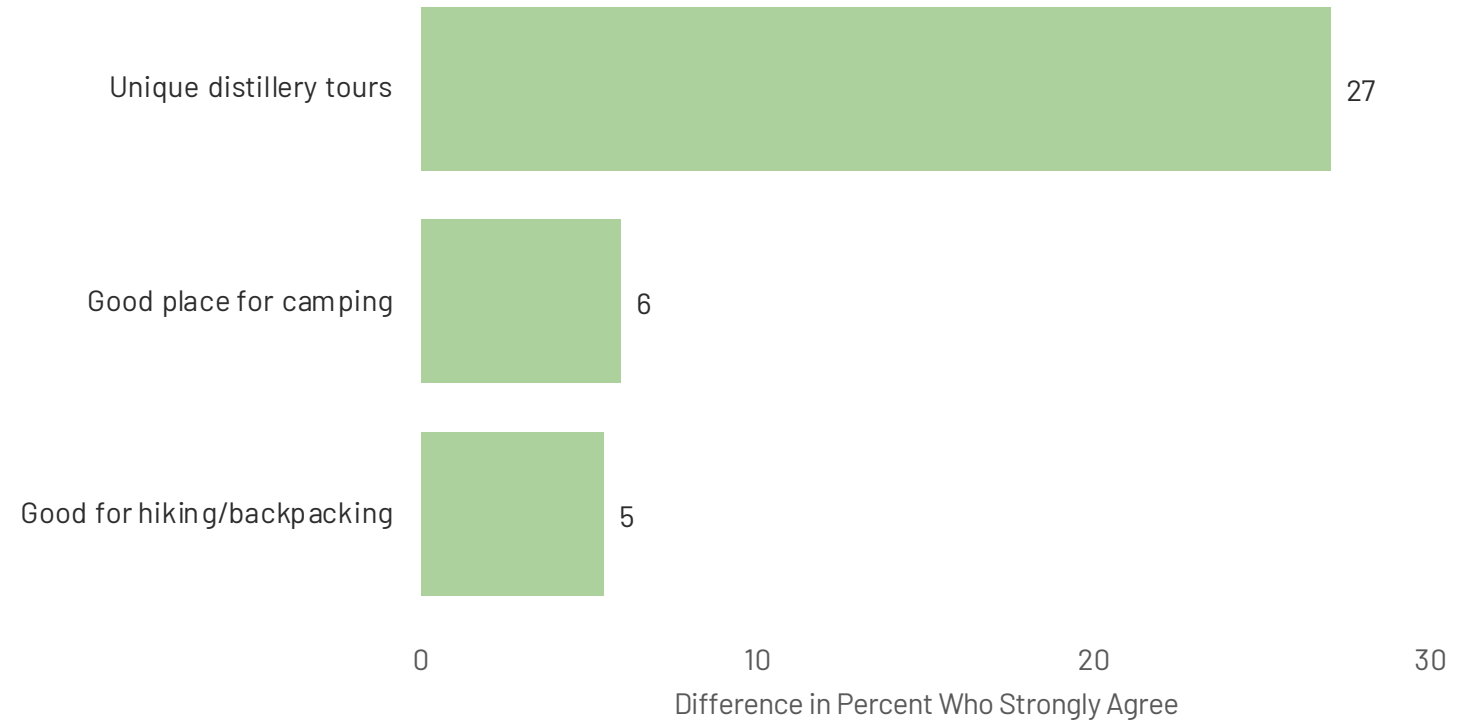


# IMAGE STRENGTHS VS. COMPETITION

Base: Total Markets

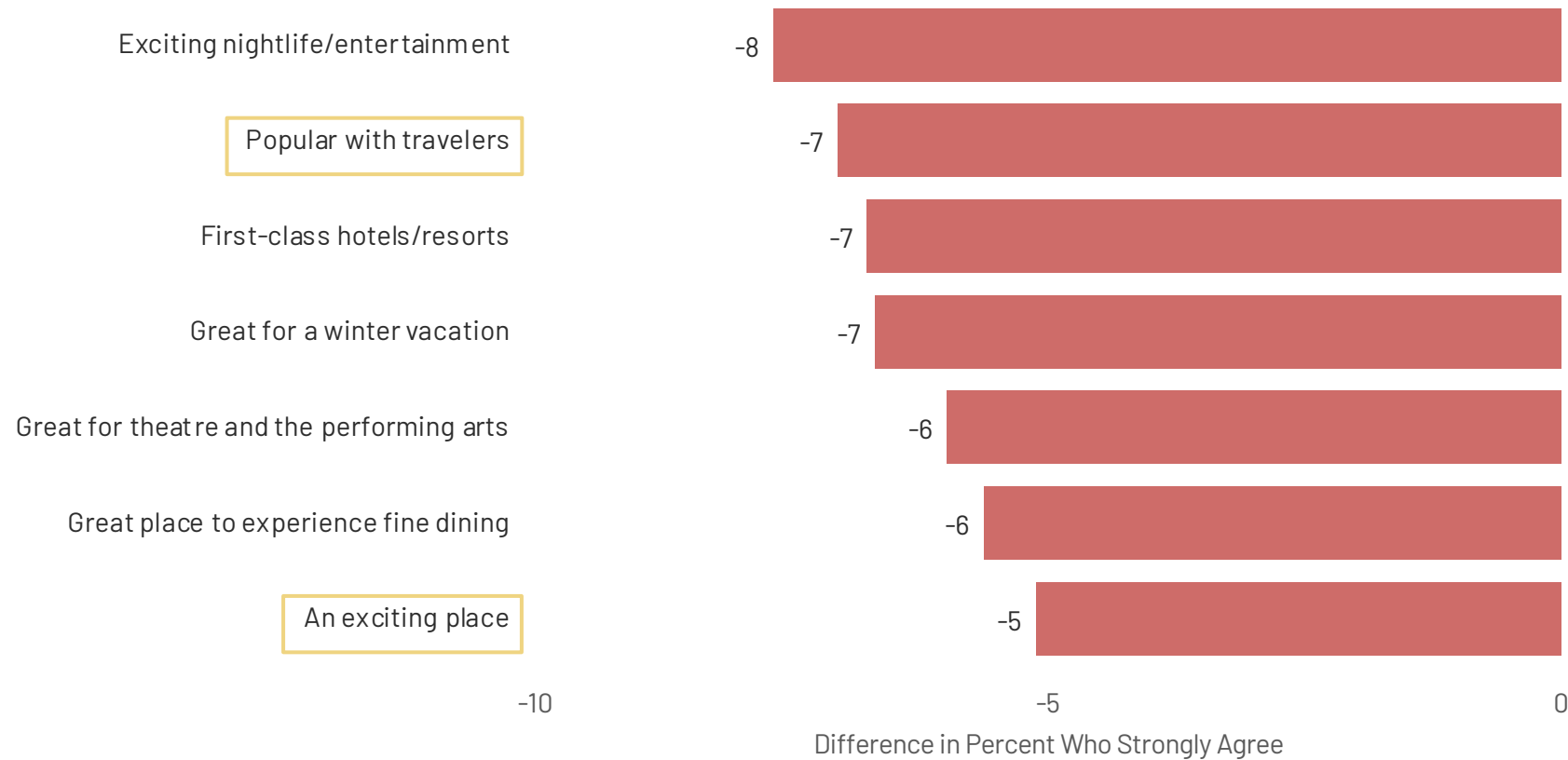


Kentucky has 3 image attribute strengths when compared to the competitive set, around distilleries and the outdoors.



# IMAGE WEAKNESSES VS. COMPETITION

Base: Total Markets



However, there are 7 image attributes where Kentucky lags the competitive set, around urban-associated attributes as well as two Hot Buttons – popular with vacationers and an exciting place.

Hot Button



"HALO EFFECT" ON  
ECONOMIC DEVELOPMENT





## THE "HALO EFFECT"

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

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

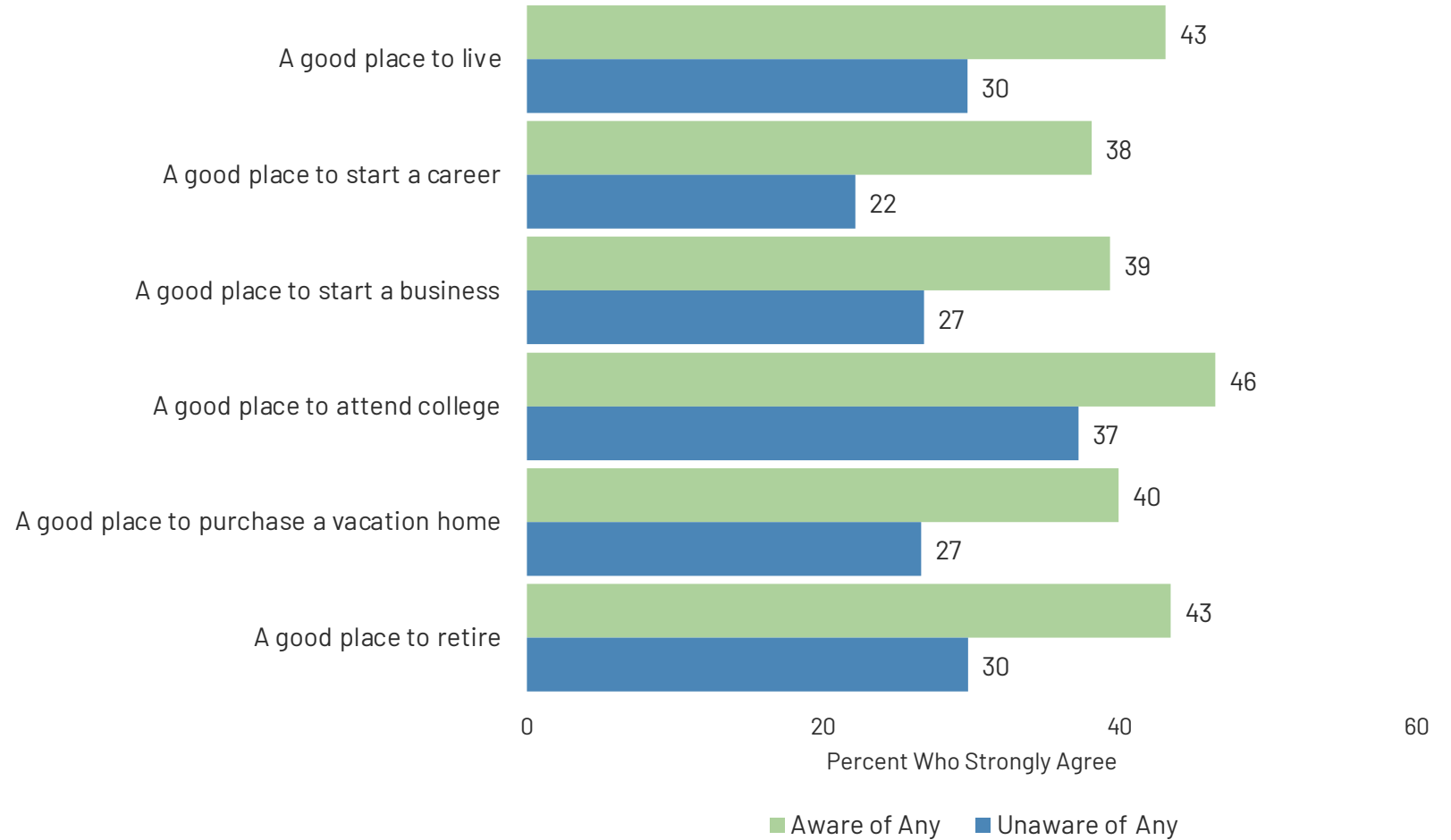


# IMPACT OF *TOURISM AD AWARENESS* ON ECONOMIC DEVELOPMENT IMAGE

Base: Out-of-State Total Markets

In every case studied, Kentucky's tourism advertising significantly improved the image of the state for a wide range of economic development objectives.

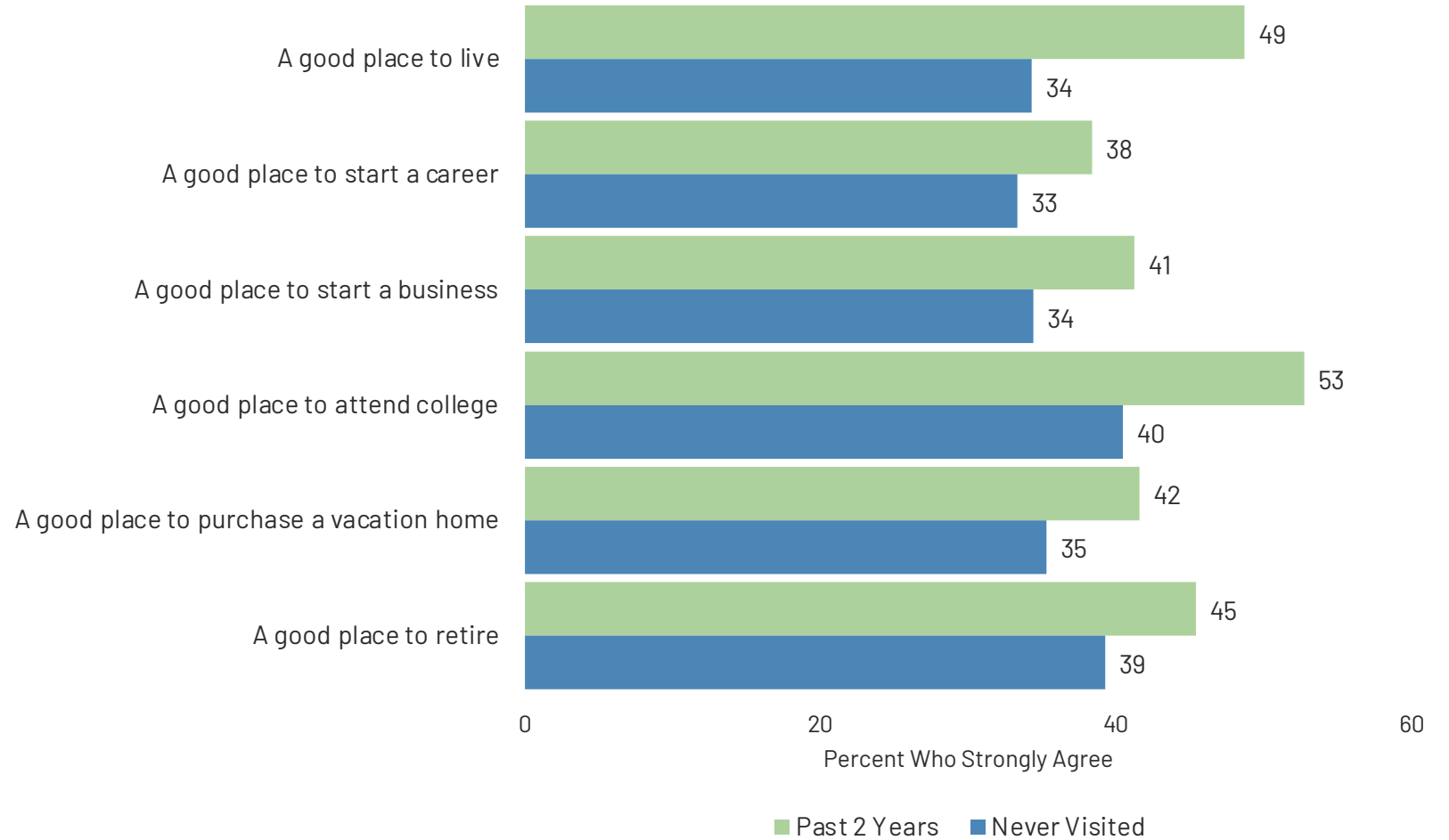
Those who saw the advertising rated Kentucky higher on all economic development indicators.



# IMPACT OF *VISITATION* ON ECONOMIC DEVELOPMENT IMAGE

Base: Out-of-State Total Markets

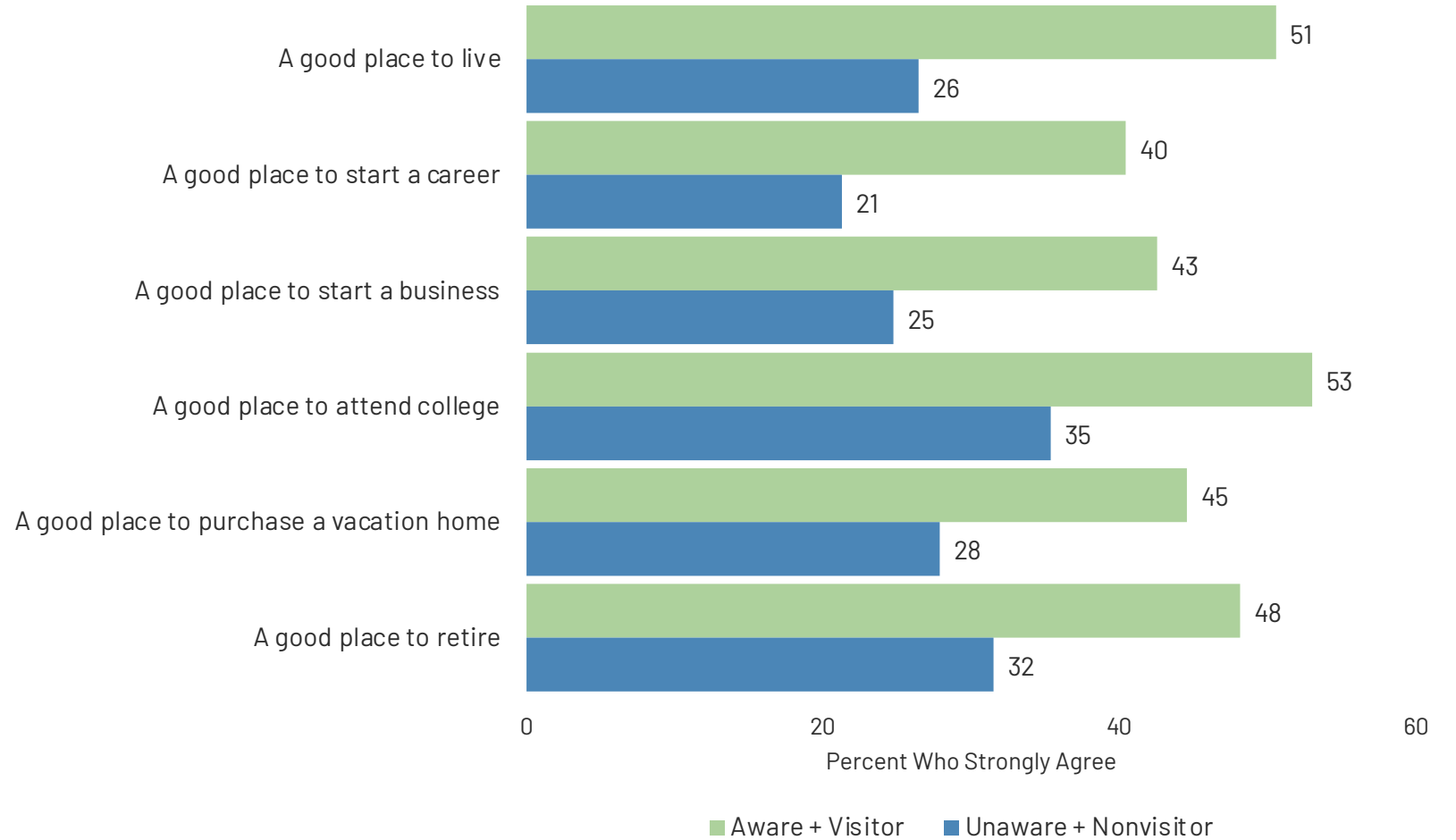
Travelers who visited Kentucky during the past two years consistently rated the state higher for all economic development indicators than those who have never visited.



# IMPACT OF AD AWARENESS + VISITATION ON ECONOMIC DEVELOPMENT IMAGE

Base: Out-of-State Total Markets

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





APPENDIX: IMAGE STRENGTHS AND  
WEAKNESSES VS. INDIVIDUAL COMPETITION





# KENTUCKY VS. TENNESSEE: IMAGE STRENGTHS AND WEAKNESSES

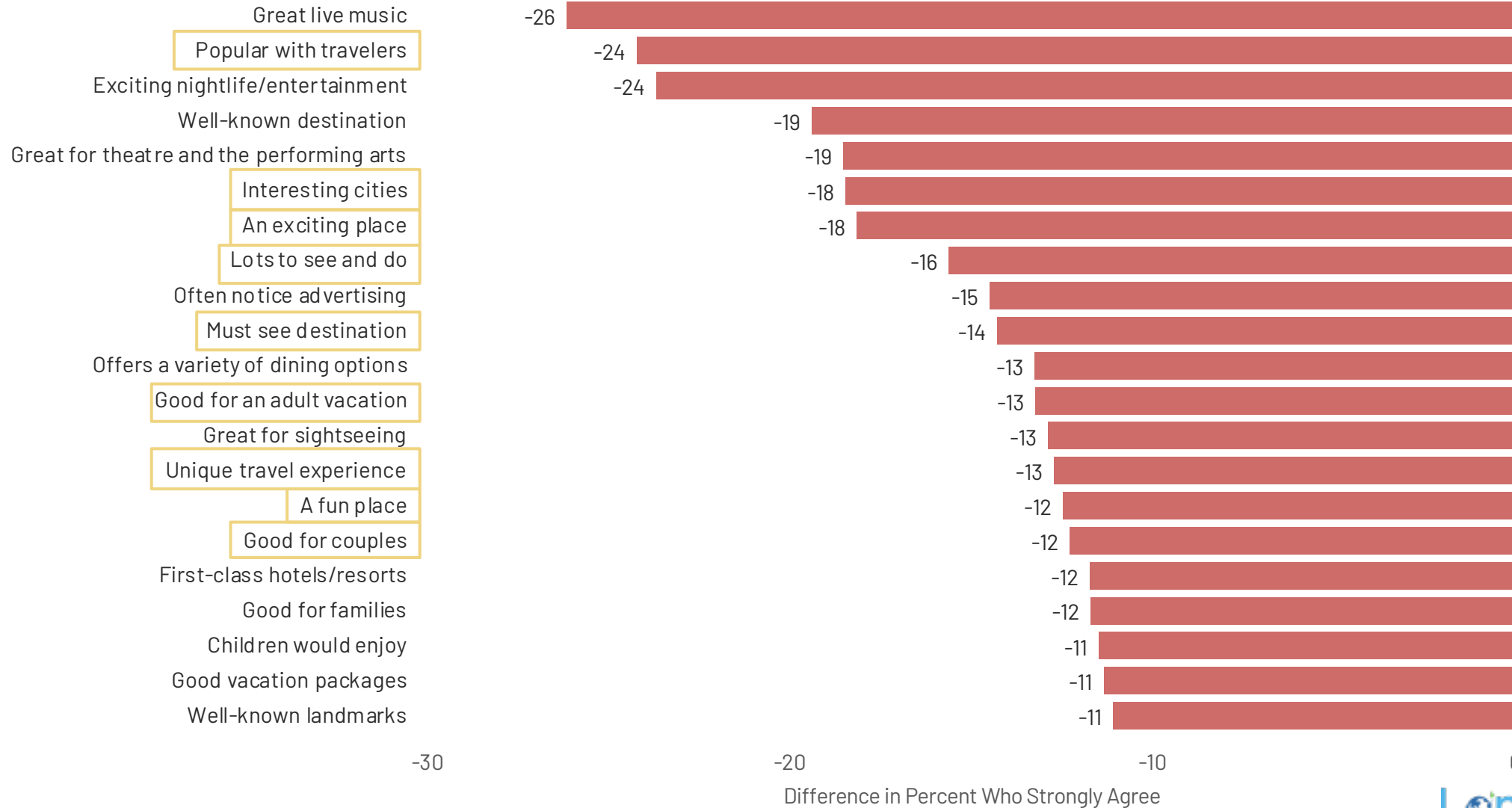


Base: Total Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE STRENGTHS  
VS. TENNESSEE

# IMAGE WEAKNESSES VS. TENNESSEE

Base: Total Markets

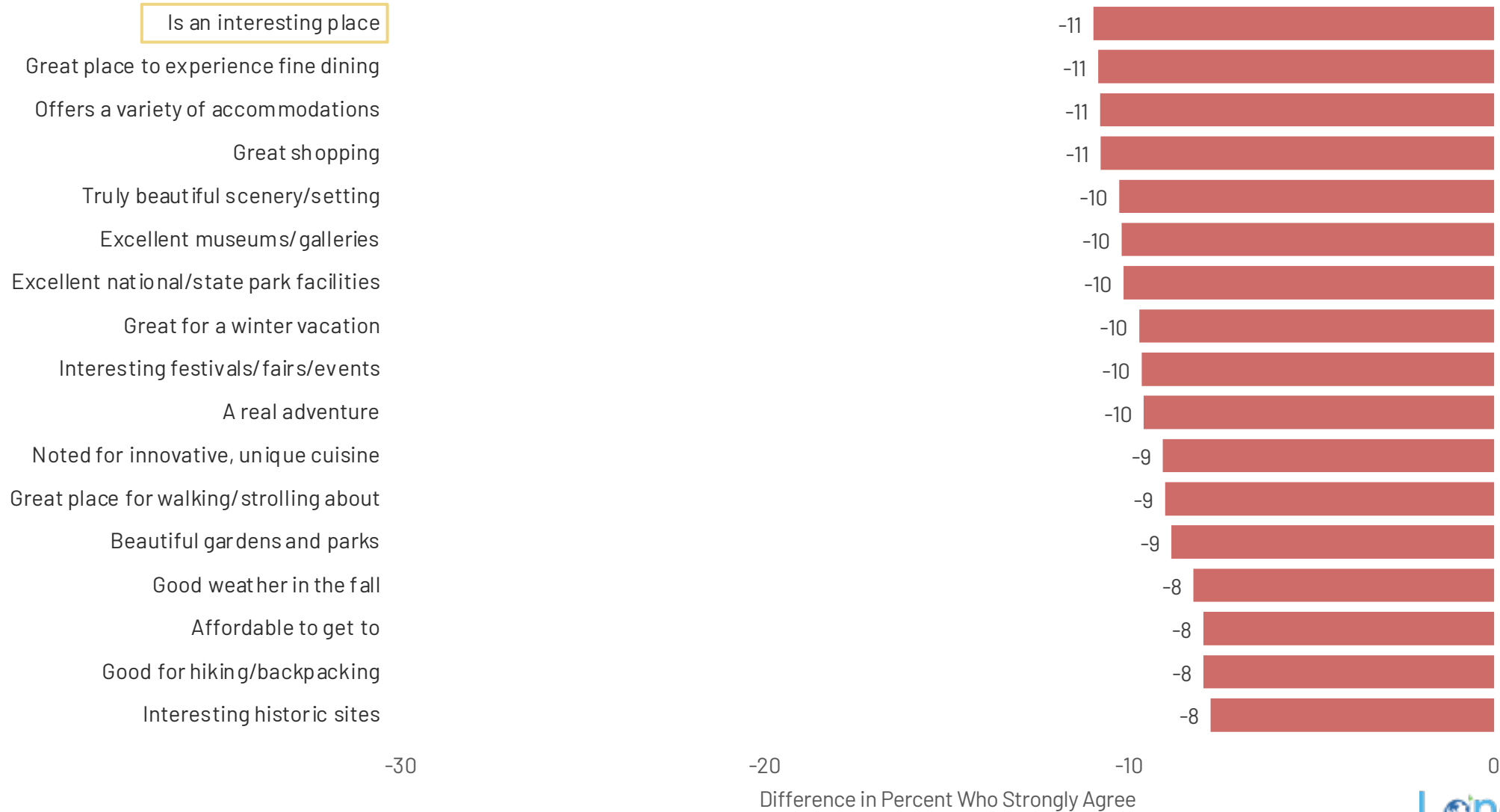


Hot Button



# IMAGE WEAKNESSES VS. TENNESSEE (CONT'D)

Base: Total Markets



Hot Button

# IMAGE WEAKNESSES VS. TENNESSEE (CONT'D)

Base: Total Markets



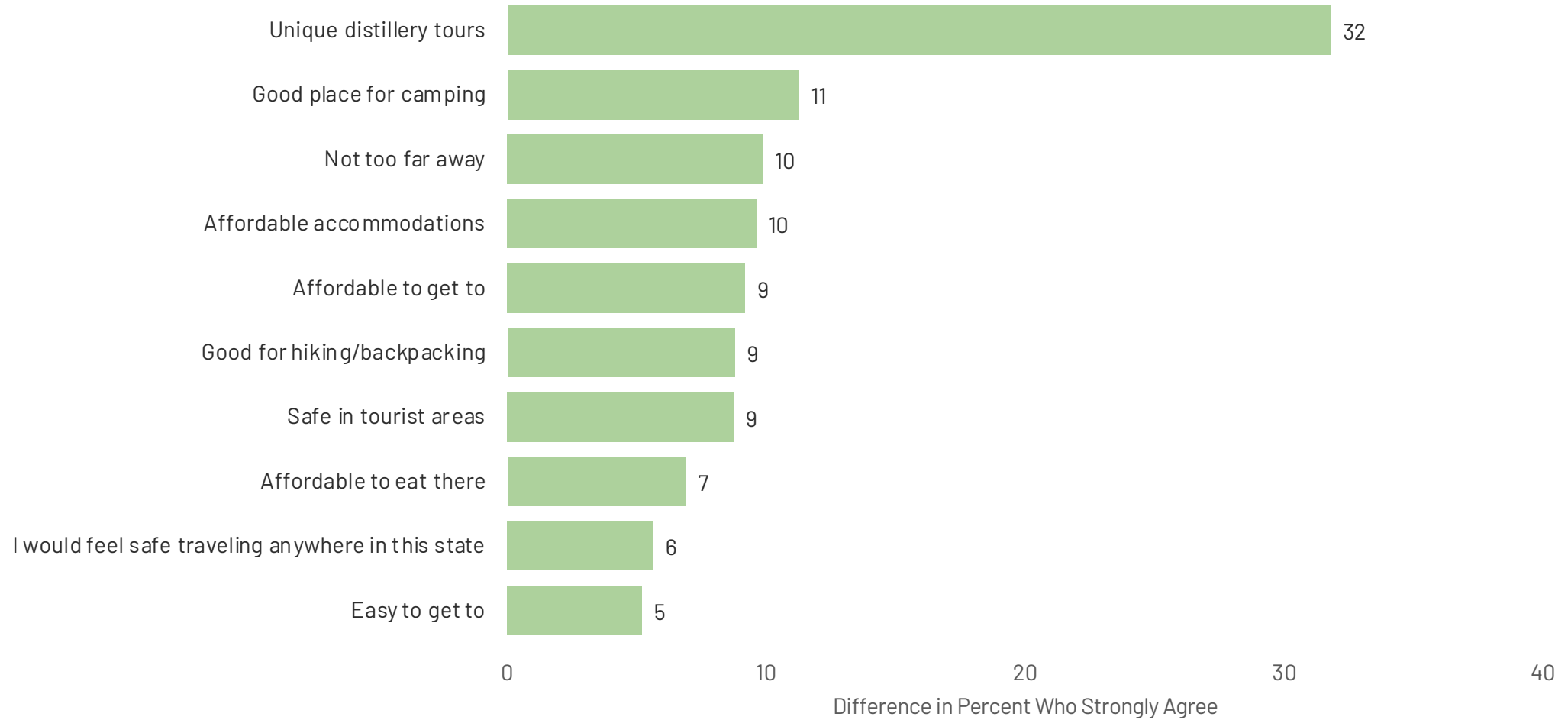


# KENTUCKY VS. GEORGIA: IMAGE STRENGTHS AND WEAKNESSES



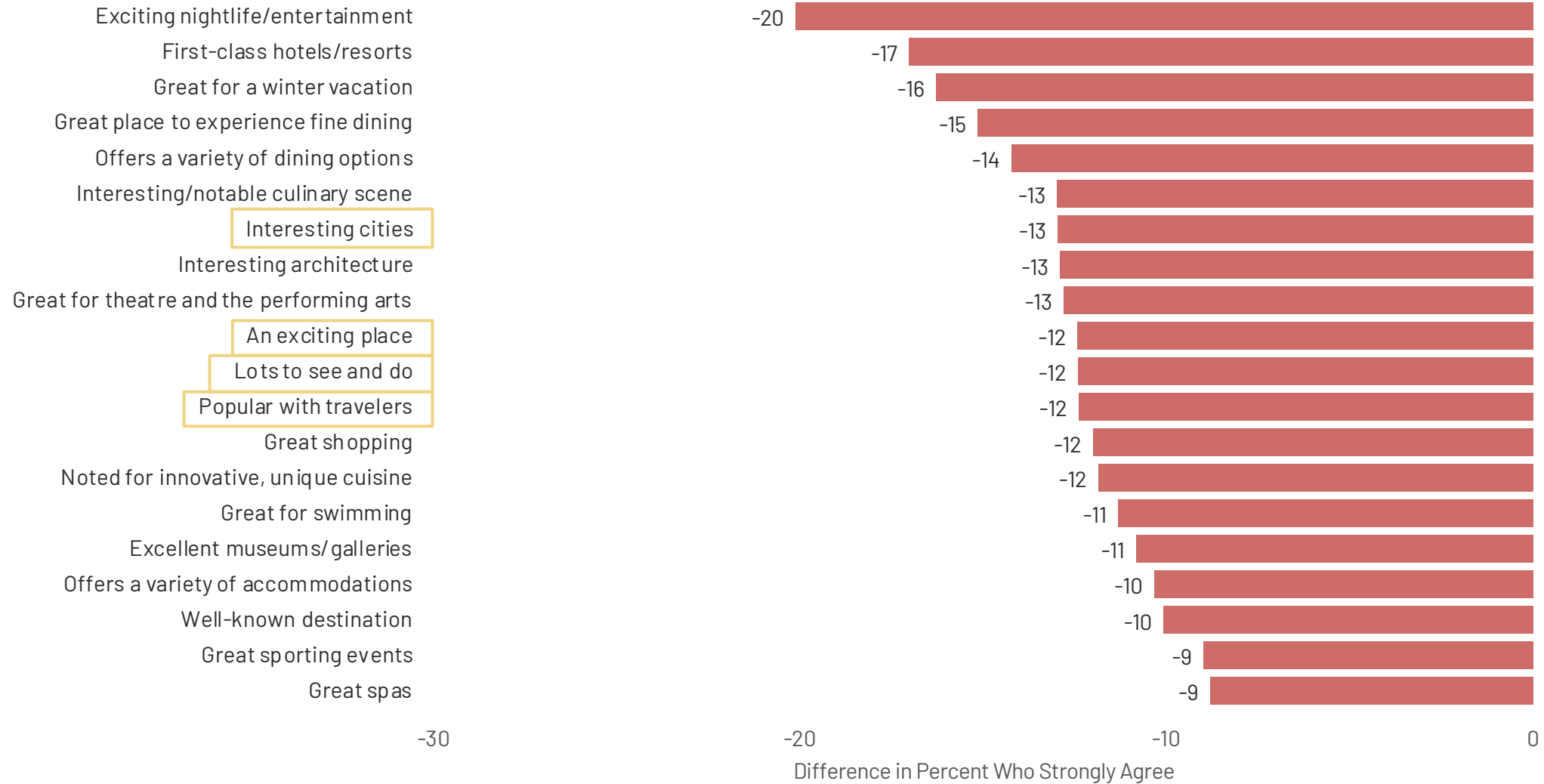
# IMAGE STRENGTHS VS. GEORGIA

Base: Total Markets



# IMAGE WEAKNESSES VS. GEORGIA

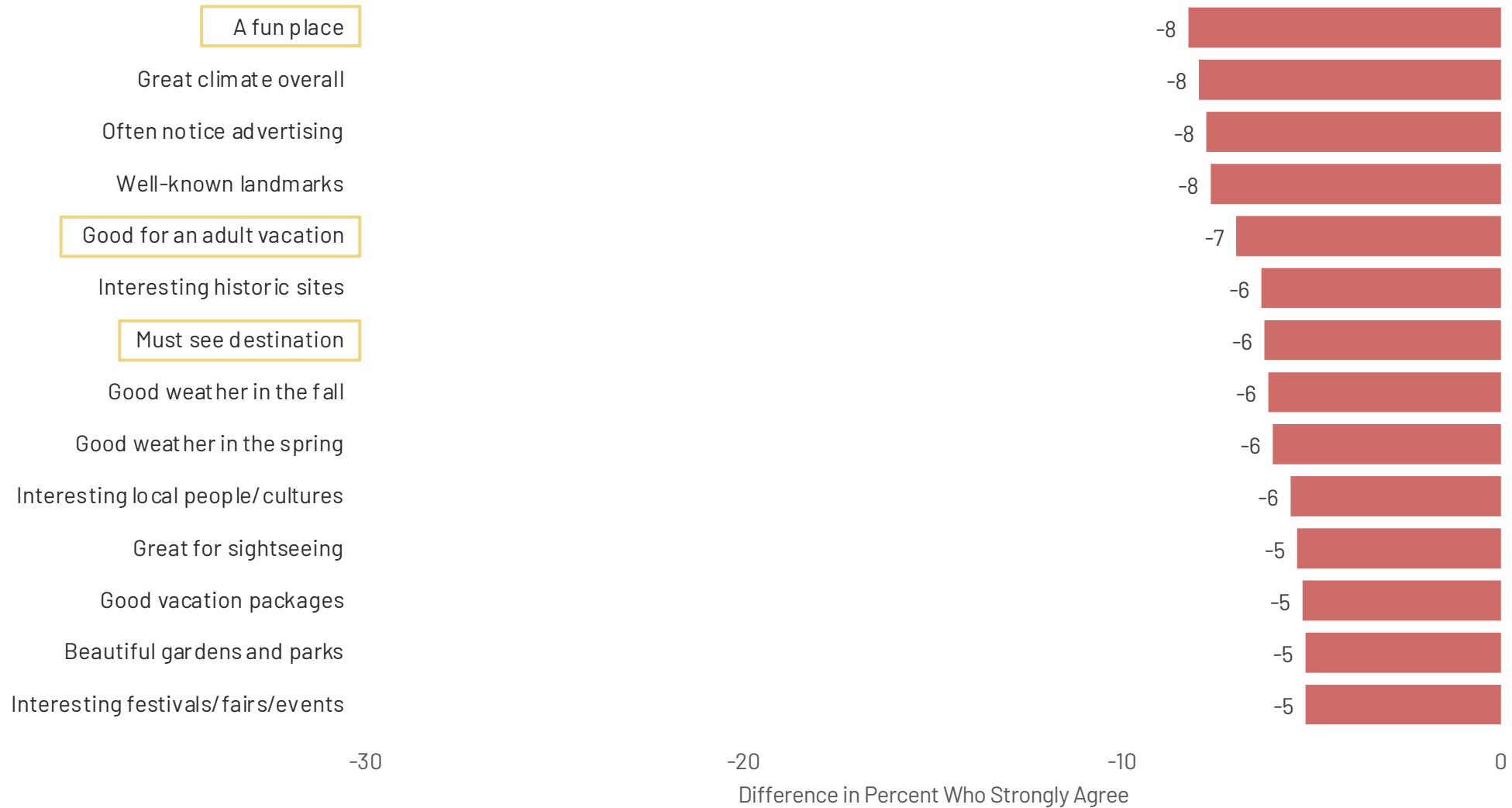
Base: Total Markets



Hot Button

# IMAGE WEAKNESSES VS. GEORGIA (CONT'D)

Base: Total Markets



Hot Button

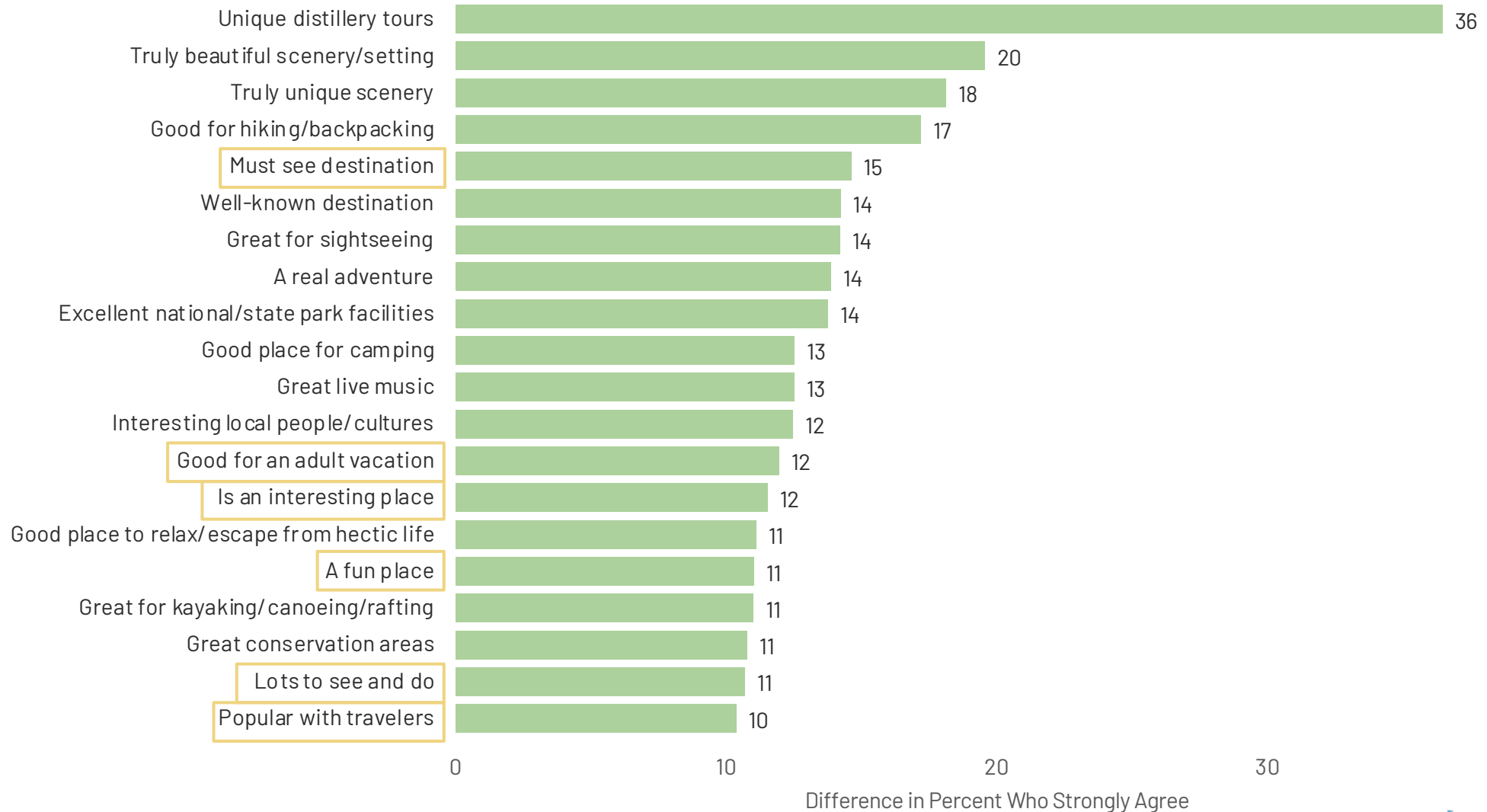


# KENTUCKY VS. INDIANA: IMAGE STRENGTHS AND WEAKNESSES



# IMAGE STRENGTHS VS. INDIANA

Base: Total Markets

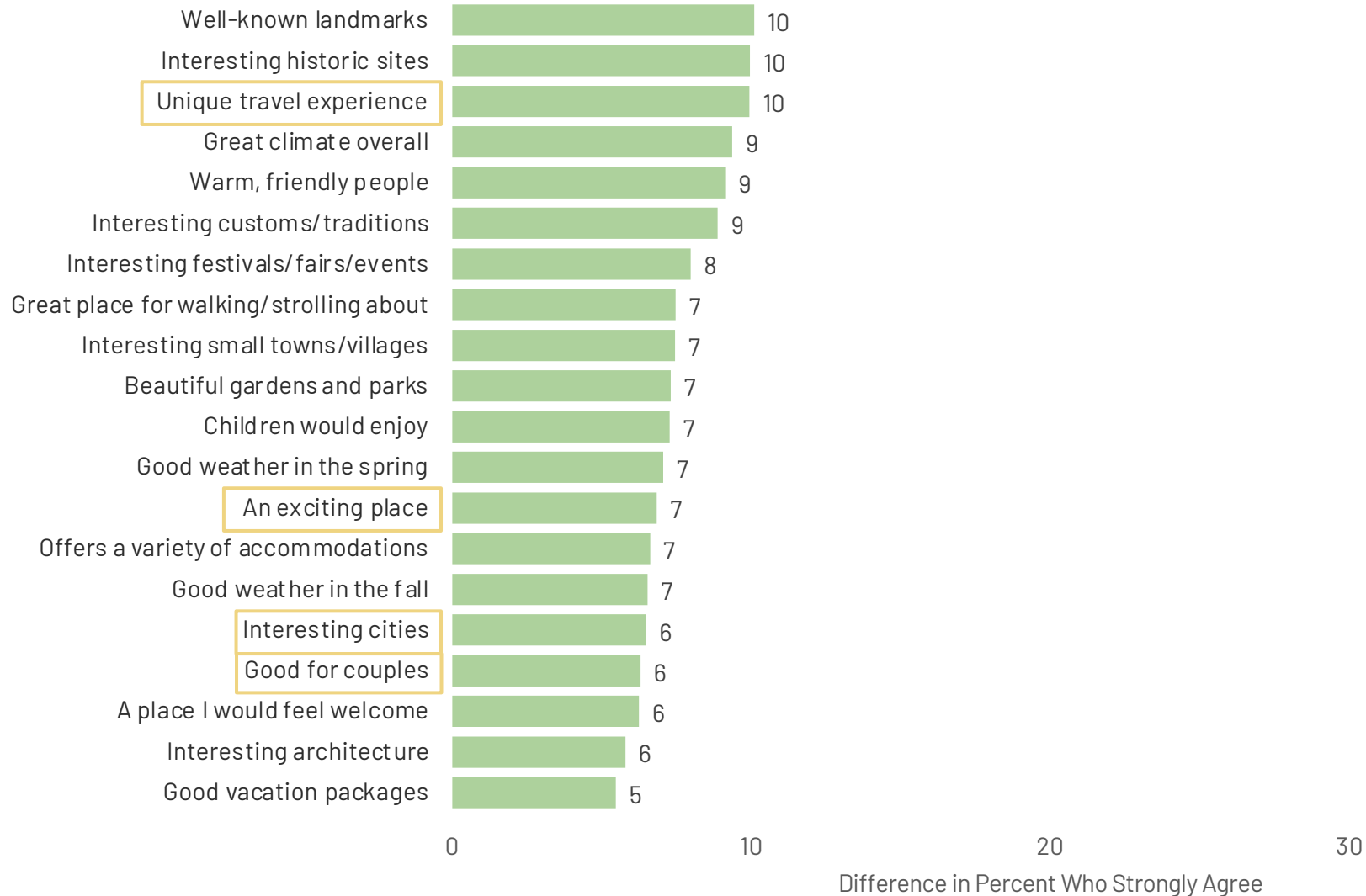


Hot Button



# IMAGE STRENGTHS VS. INDIANA (CONT'D)

Base: Total Markets



Hot Button

Base: Total Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE  
WEAKNESSES VS. INDIANA

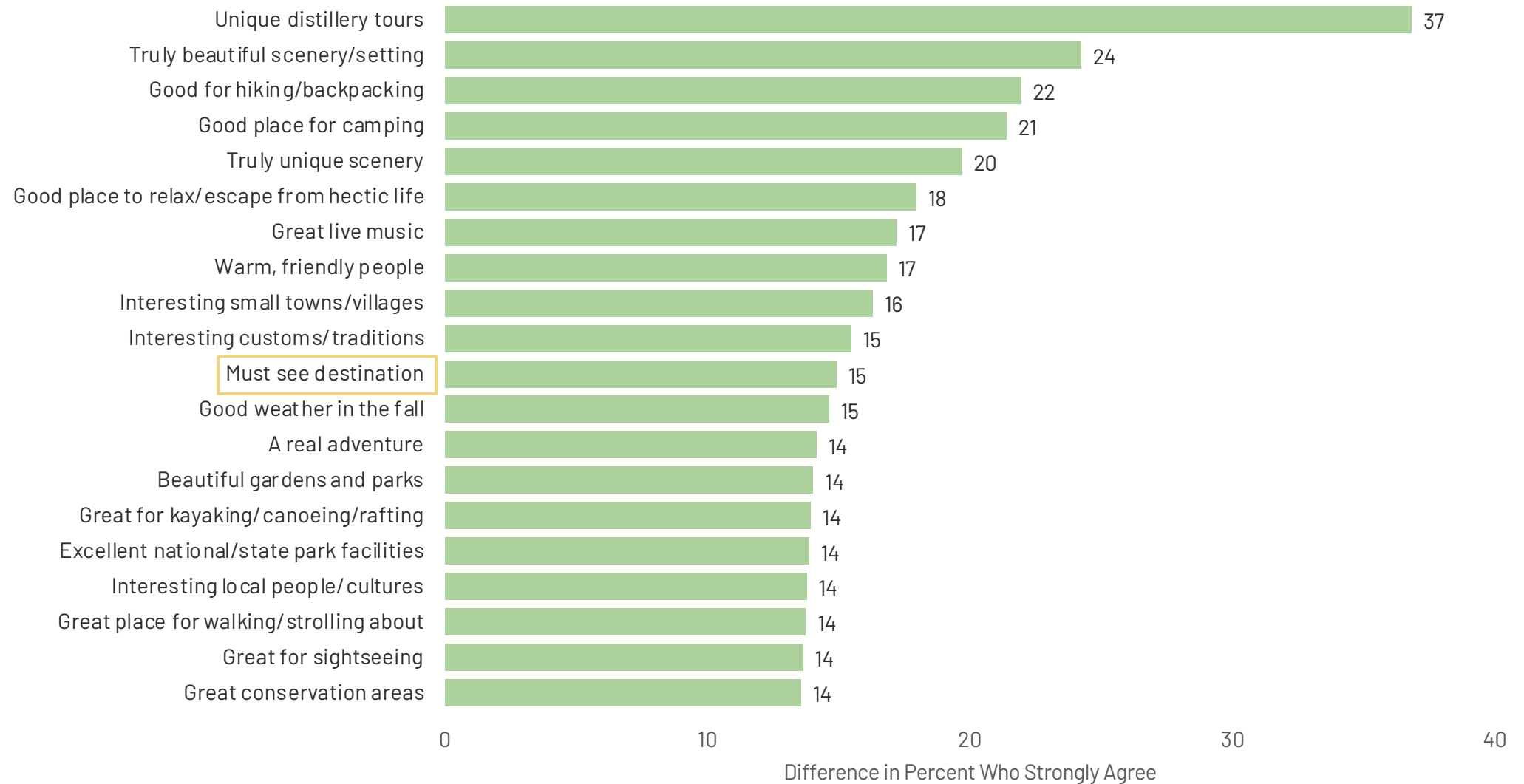


# KENTUCKY VS. OHIO: IMAGE STRENGTHS AND WEAKNESSES



# IMAGE STRENGTHS VS. OHIO

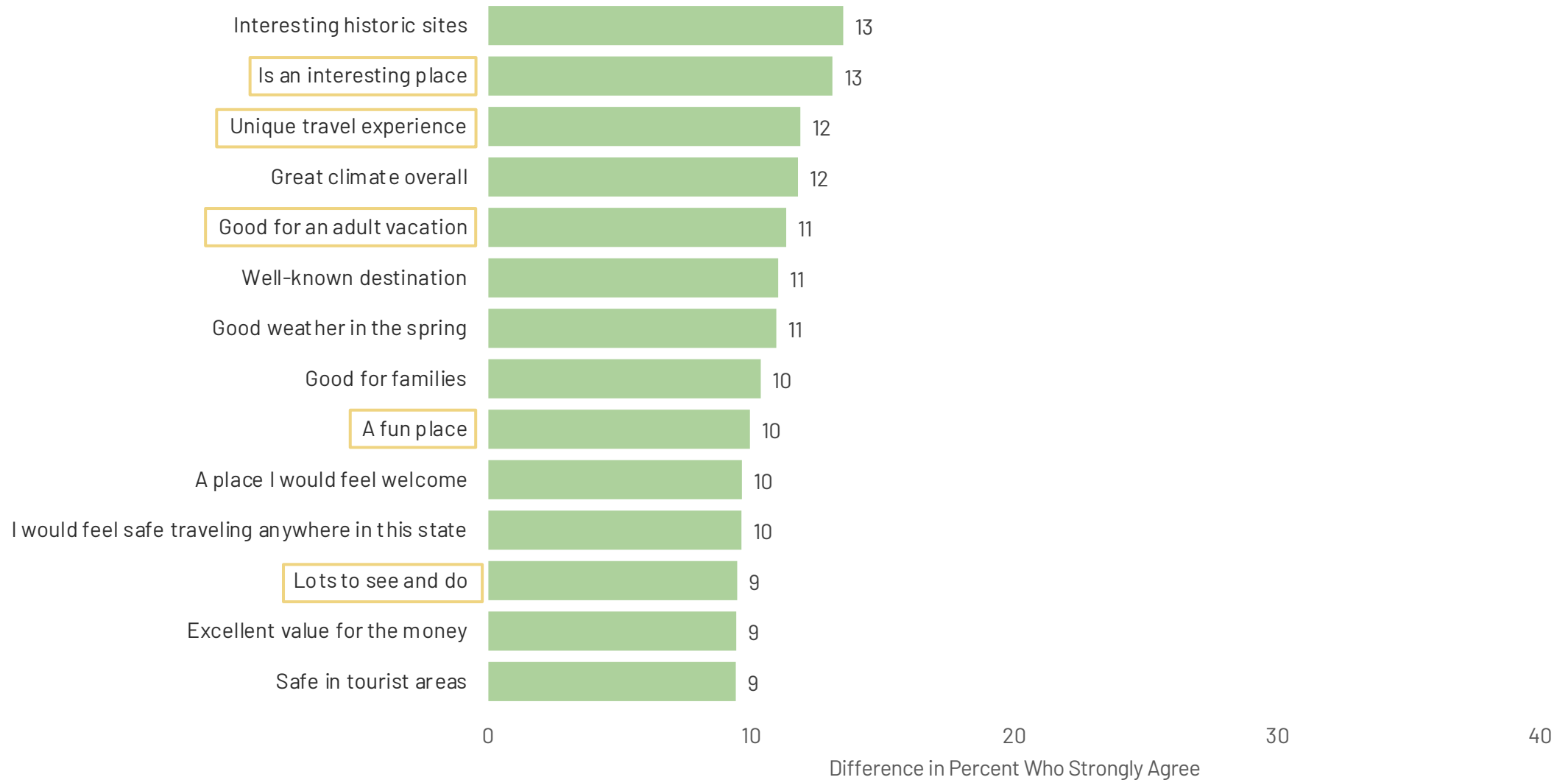
Base: Total Markets



Hot Button

# IMAGE STRENGTHS VS. OHIO

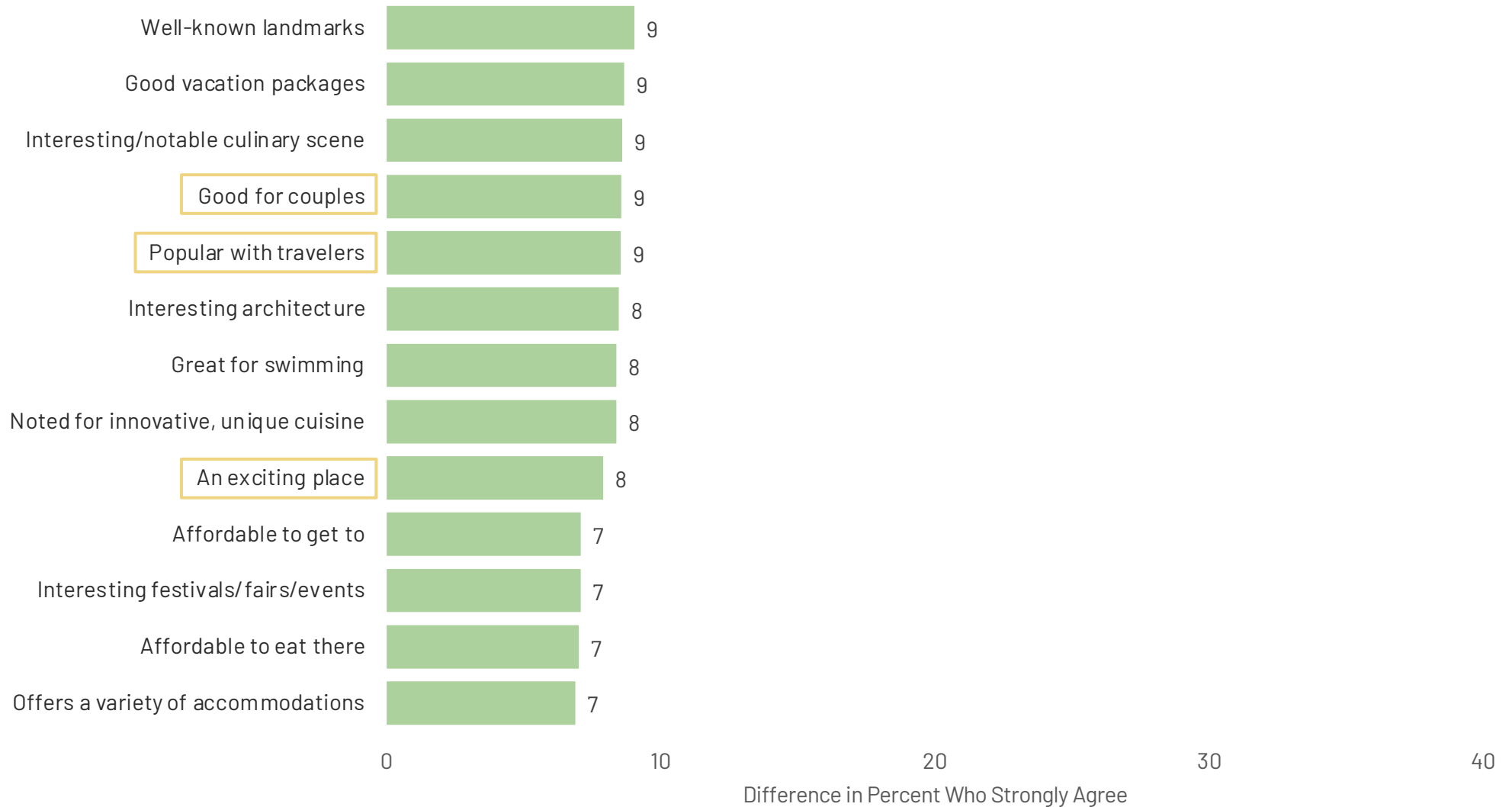
Base: Total Markets



Hot Button

# IMAGE STRENGTHS VS. OHIO

Base: Total Markets



Hot Button

Base: Total Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE  
WEAKNESSES VS. OHIO



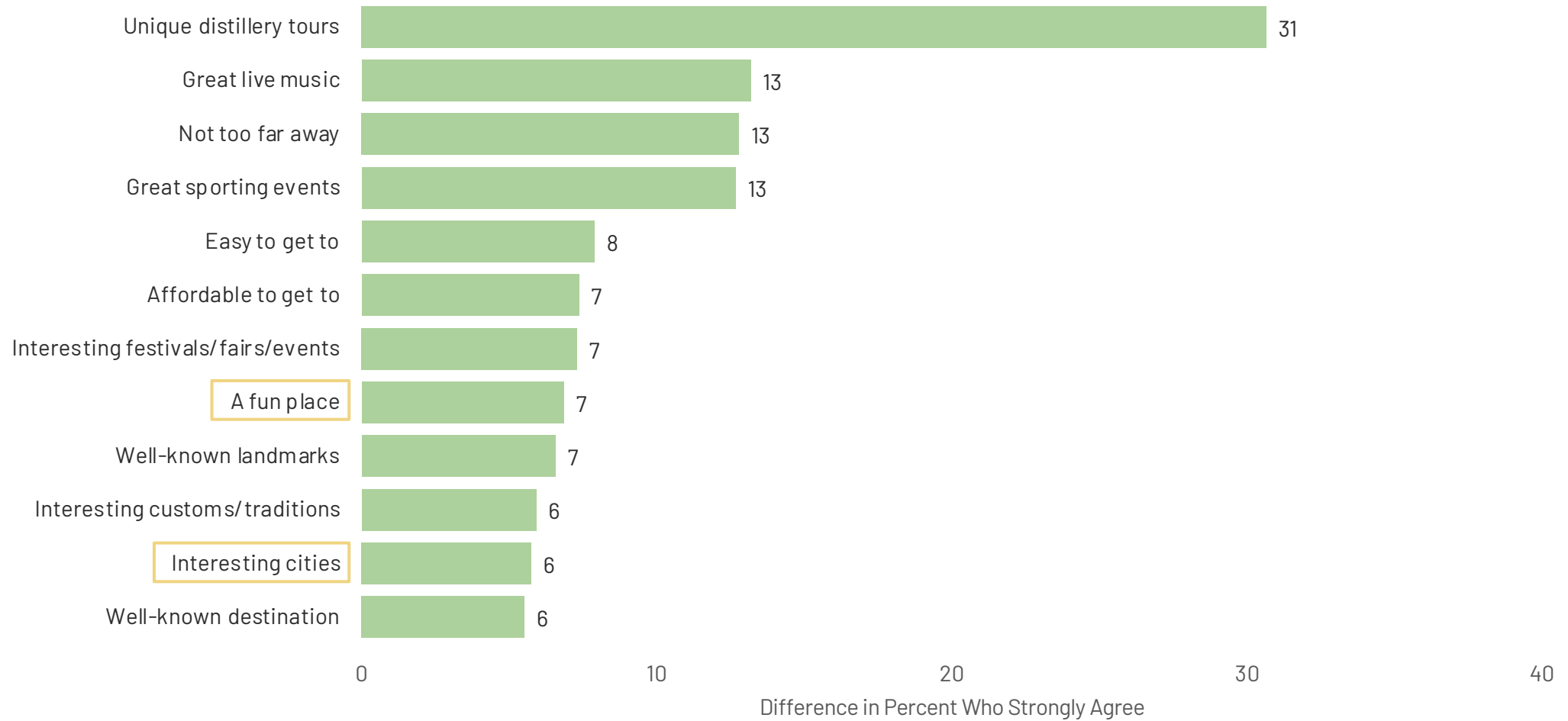
# KENTUCKY VS. WEST VIRGINIA: IMAGE STRENGTHS AND WEAKNESSES





# IMAGE STRENGTHS VS. WEST VIRGINIA

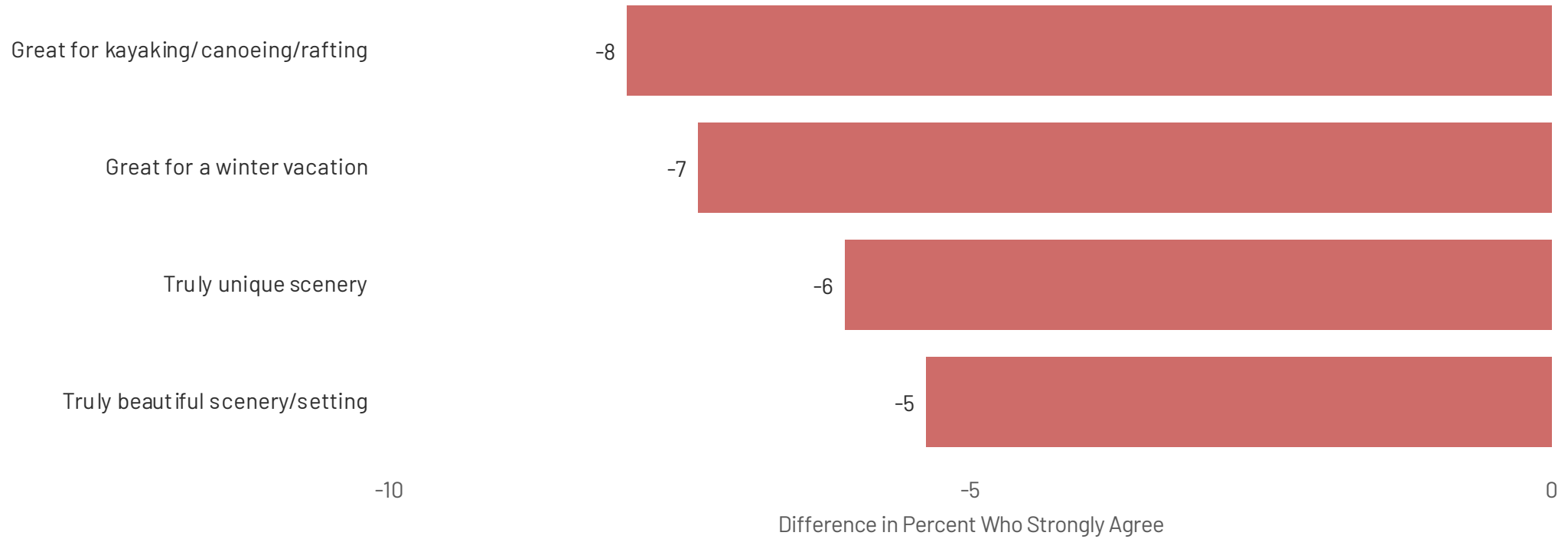
Base: Total Markets



Hot Button

# IMAGE WEAKNESSES VS. WEST VIRGINIA

Base: Total Markets



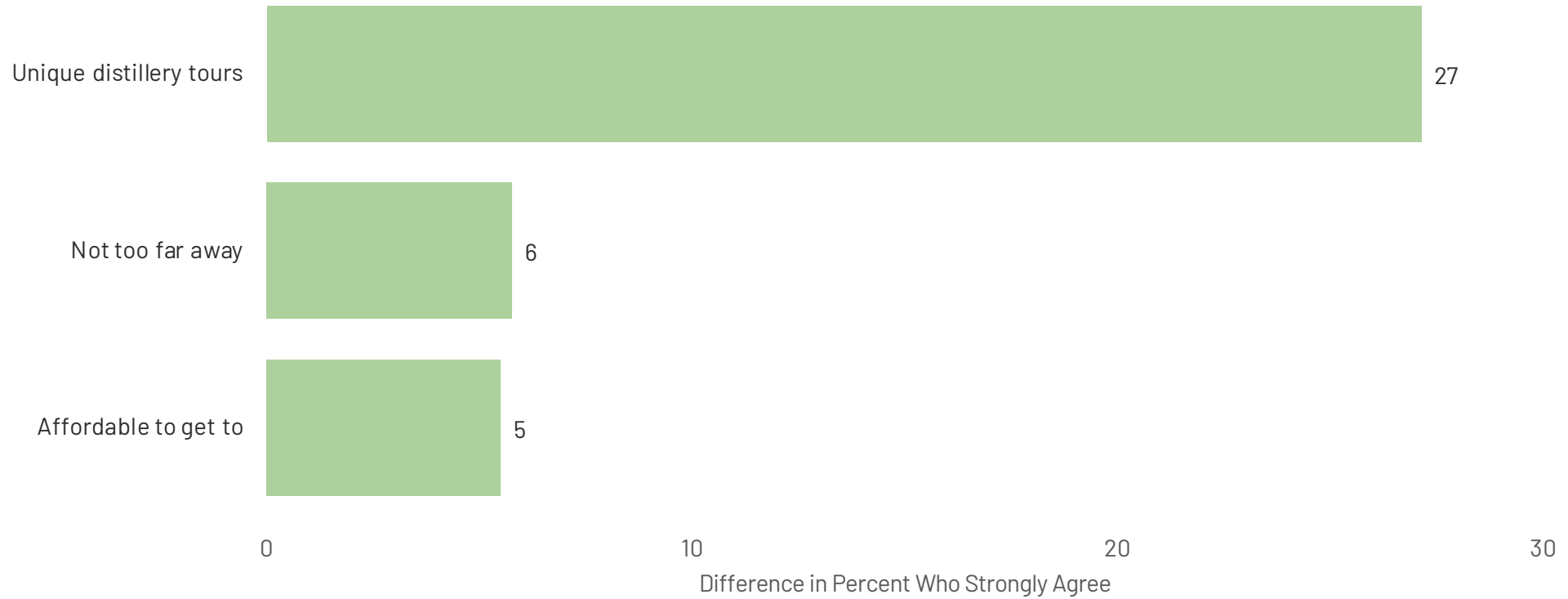


# KENTUCKY VS. NORTH CAROLINA: IMAGE STRENGTHS AND WEAKNESSES



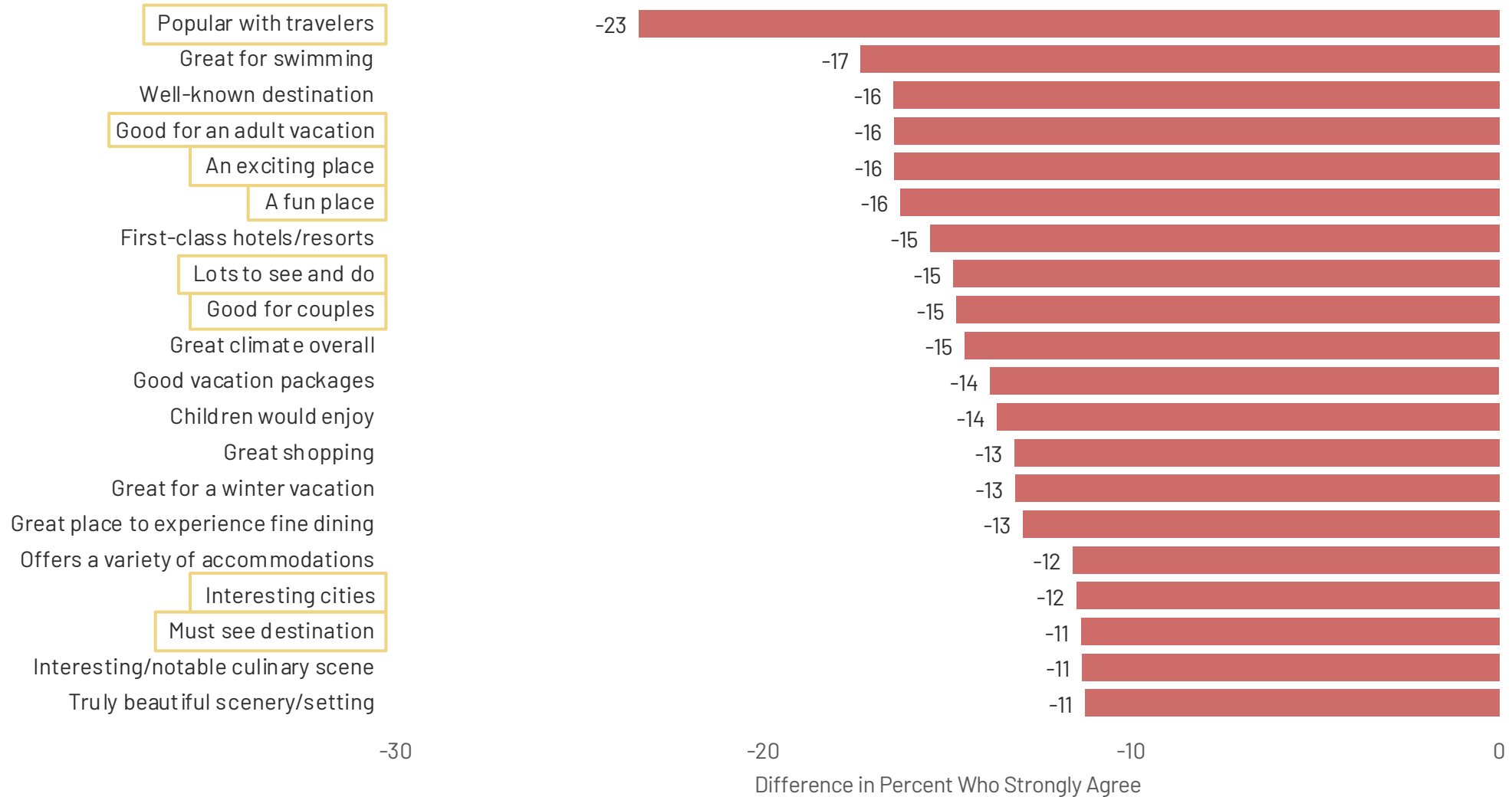
# IMAGE STRENGTHS VS. NORTH CAROLINA

Base: Total Markets



# IMAGE WEAKNESSES VS. NORTH CAROLINA

Base: Total Markets



Hot Button

# IMAGE WEAKNESSES VS. NORTH CAROLINA (CONT'D)

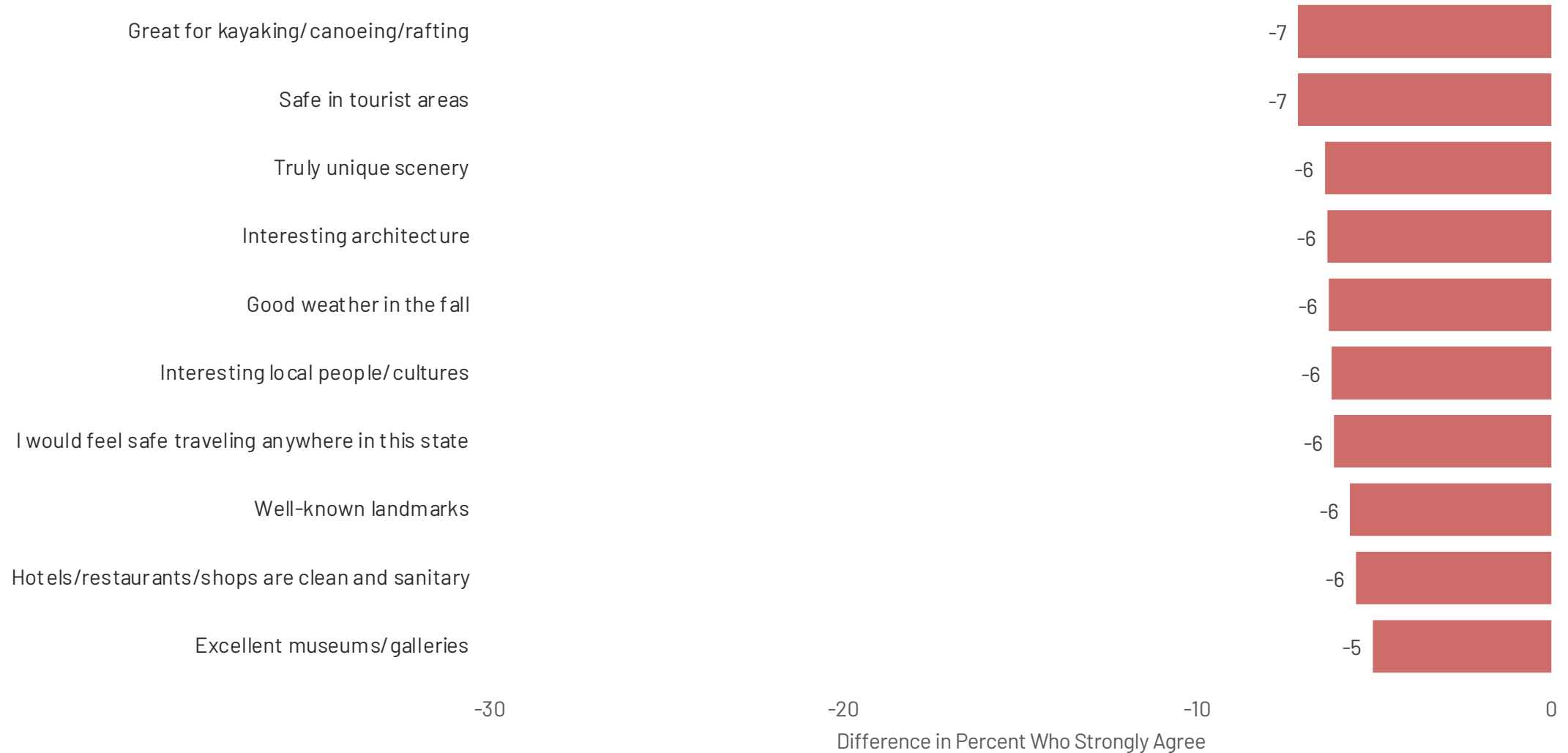
Base: Total Markets



Hot Button

# IMAGE WEAKNESSES VS. NORTH CAROLINA (CONT'D)

Base: Total Markets



TEAM   
KENTUCKY.®

Longwoods  
INTERNATIONAL