

# Kentucky 2023

## Advertising ROI Research – Existing Markets

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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 **14 key markets** and received **1,000 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**

## 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)

Sant Louis (75)

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.

\*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.



# [ADVERTISING AWARENESS]



# AWARENESS\* OF THE AD CAMPAIGN

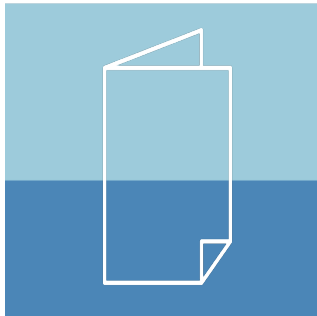
Base: Existing Markets

65%

Aware of  
Any Ad

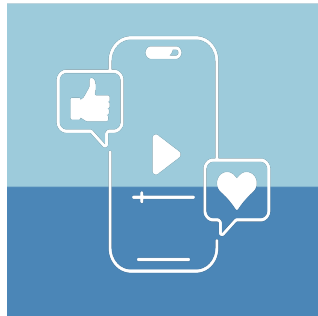
2022 Overall Awareness: 57%

PRINT AD AWARE



44%

SOCIAL AD AWARE



42%

DIGITAL AD AWARE



40%

VIDEO AD AWARE



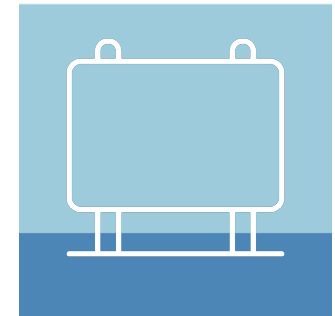
37%

RADIO AD AWARE



29%

OUT-OF-HOME  
AD AWARE

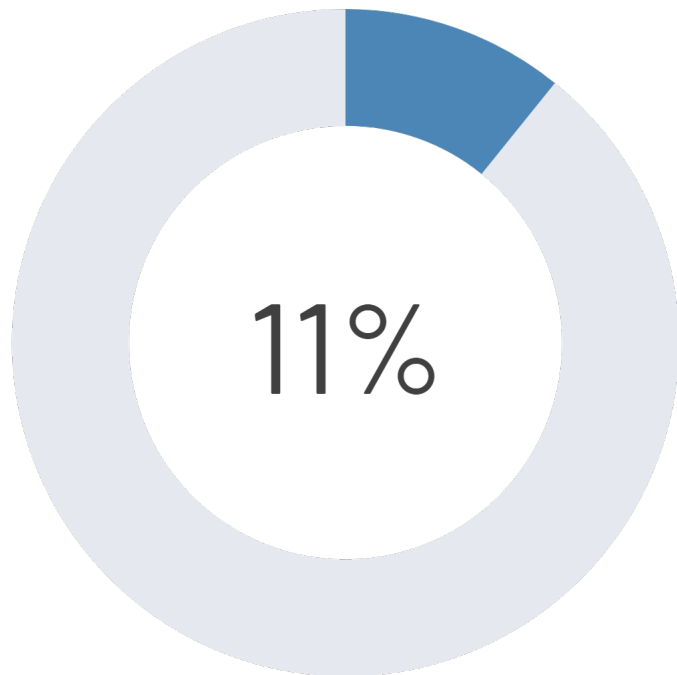


27%

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

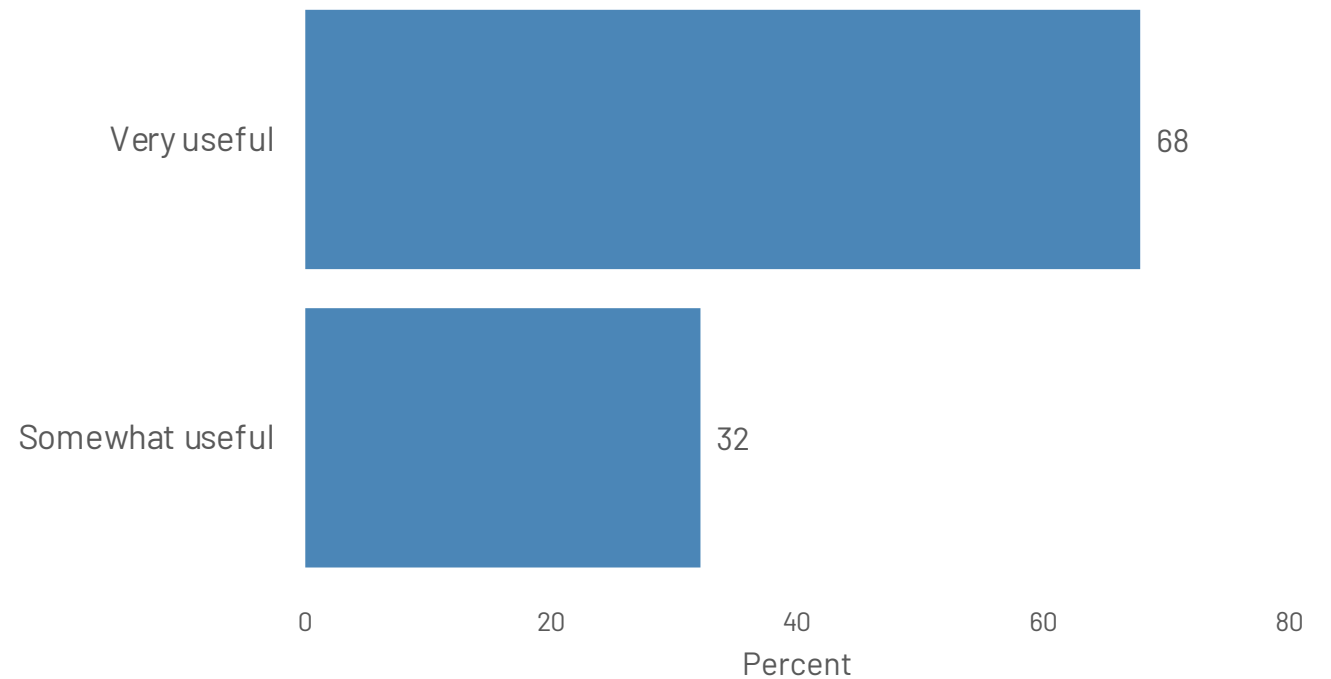
Base: Existing Markets

## Awareness of Website



2022 Awareness of Website: 14%

## How useful was the Tourism Kentucky website?\*

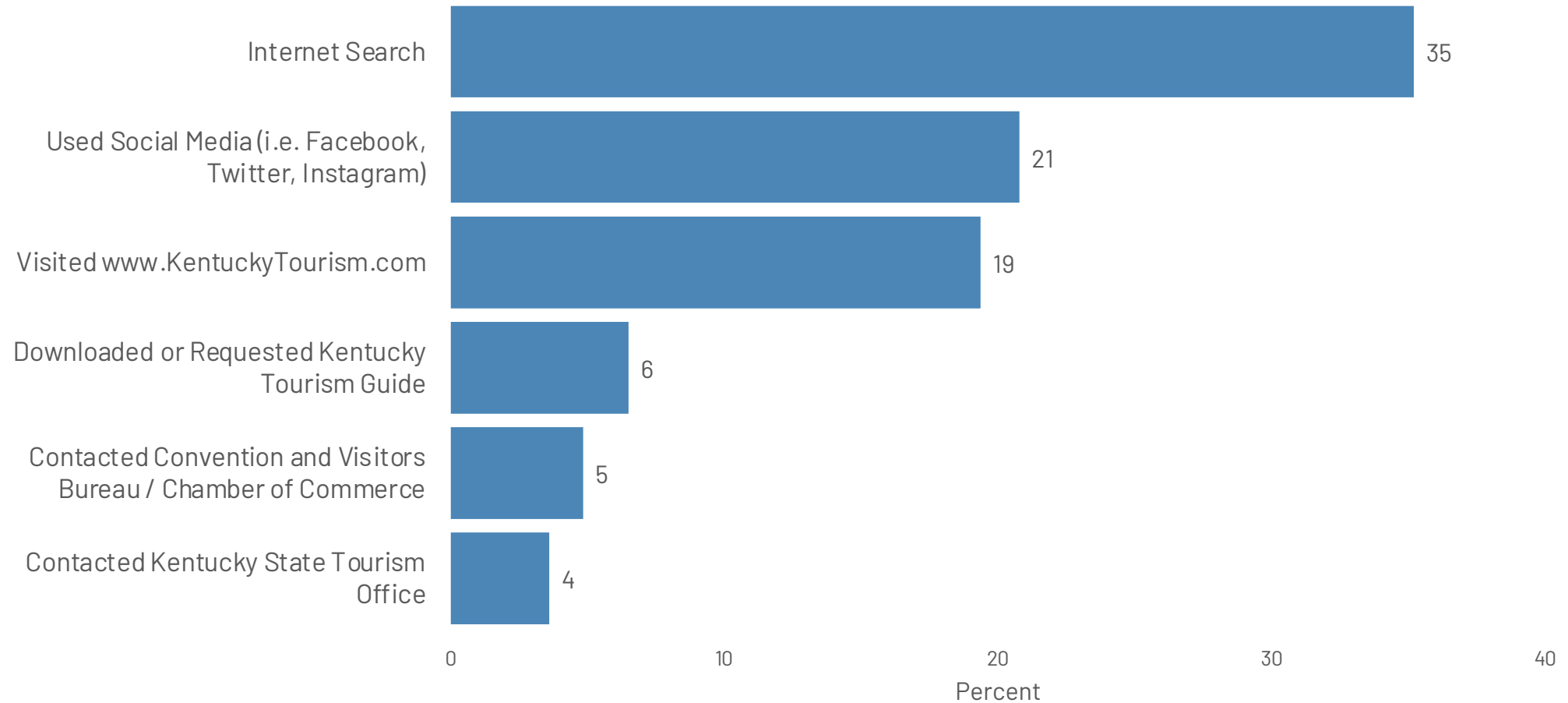


\*No responses for 'Not very useful' and 'Not at all useful'



# ACTIONS TAKEN TO OBTAIN INFORMATION ABOUT TRAVELING TO KENTUCKY

Base: Existing Markets



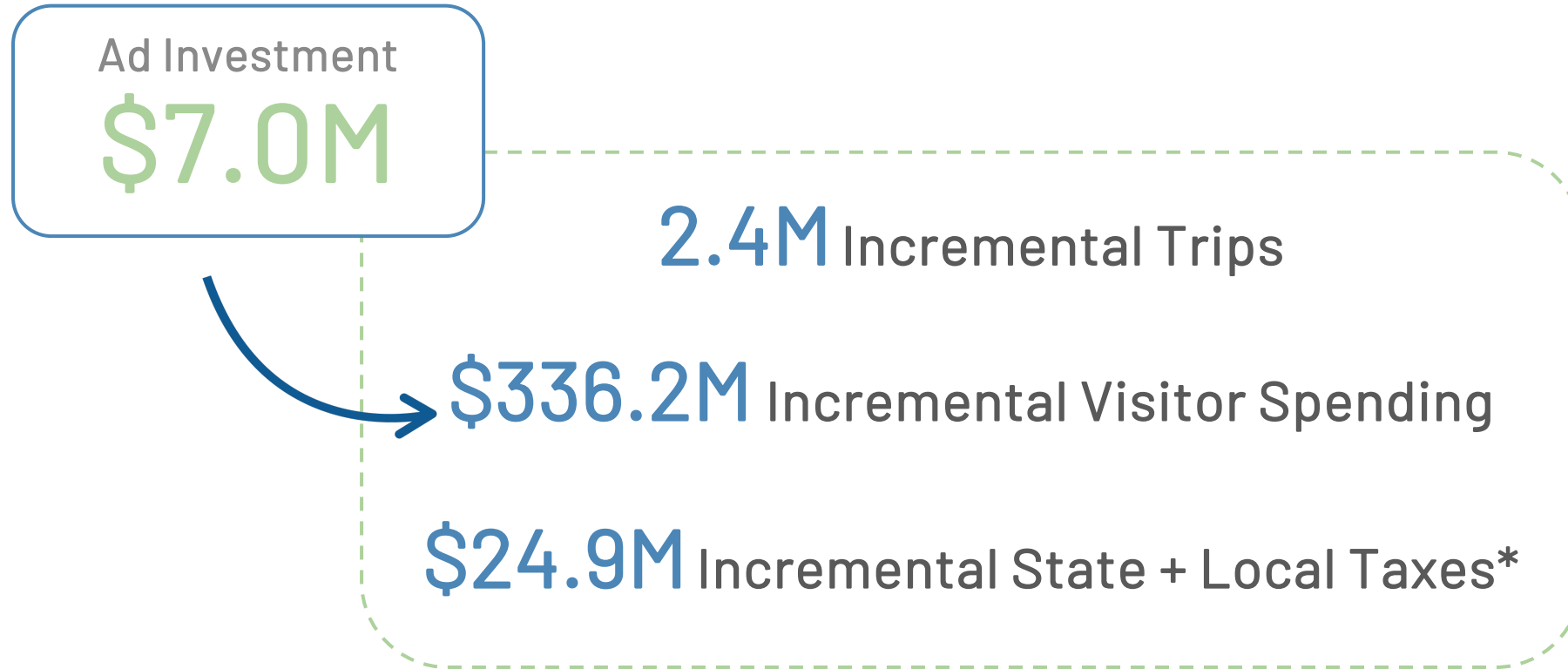


[RETURN ON INVESTMENT]



# RETURN ON INVESTMENT: 2023

Base: Existing Markets



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

Base: Existing Markets

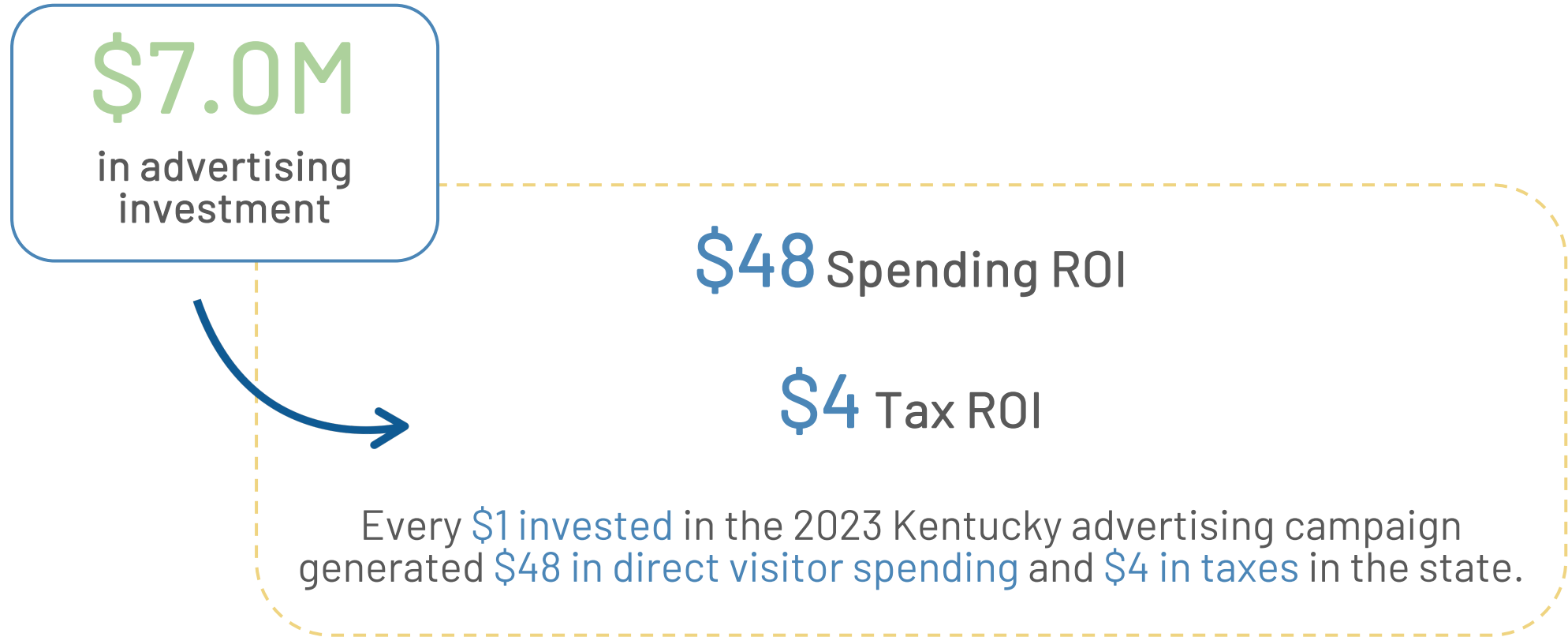
## CAMPAIGN EFFICIENCY

Ad \$'s Per Trip: **\$2.93**

Trips Per Ad \$: **0.34**

# THE BOTTOM LINE: 2023

Base: Existing Markets



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

Base: Existing Markets

## Existing Markets

	2021	2022*	2023*
Spending ROI	\$53	\$63	\$48
Tax ROI	\$4	\$5	\$4

\*2022 Existing Markets: *Compared to 2021, fielding this study in fewer markets resulted in a 21% decline in the number of existing market travelers potentially exposed to the campaign.*

\*\*2023 Existing Markets: *Compared to 2022 Markets - Existing Markets excludes Tri-Cities DMA Counties & Detroit.*



DESTINATION VISITATION  
& INTEREST



# PAST VISITATION

Base: Existing Markets



	Ever Visited	Visited in Past 2 Years*
Tennessee	67%	62%
Kentucky	55%	61%
Indiana	47%	59%
Georgia	53%	59%
Ohio	49%	58%
North Carolina	47%	44%
West Virginia	23%	41%

\*Among those who have ever visited respective destination



# INTENT TO VISIT IN NEXT 12 MONTHS

Base: Existing Markets

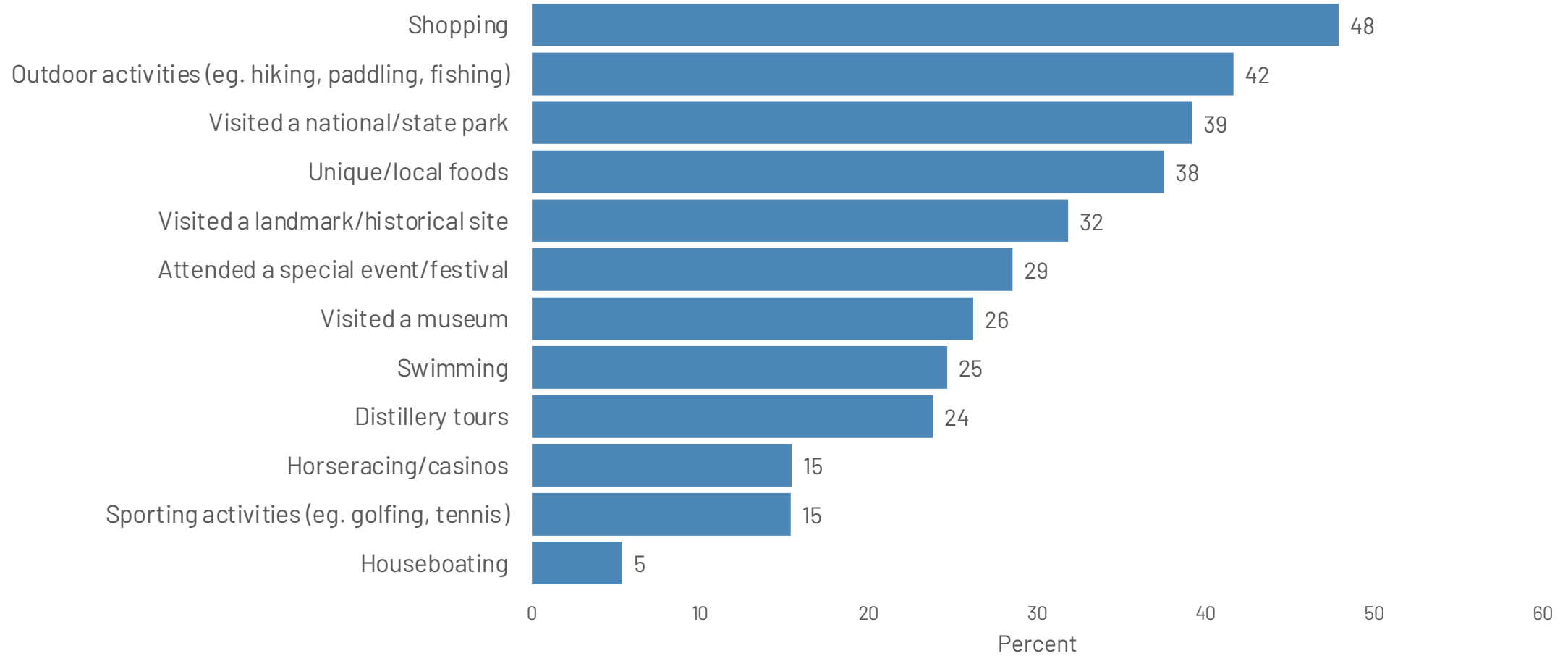


	Probably or Definitely Will Visit Destination in Next 12 Months*
Tennessee	58%
Georgia	48%
Kentucky	47%
Indiana	43%
North Carolina	41%
Ohio	41%
West Virginia	28%

\*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]

TEAM  KENTUCKY®

# 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

Family Atmosphere

Unique

Popular

Entertainment

Luxurious

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

A fun place

Must see destination

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

Great shopping

Well-known landmarks

Beautiful gardens and parks

Interesting historic sites

Excellent museums/galleries

Great place for walking/strolling about

Interesting architecture

Interesting small towns/villages

## Family Atmosphere

Children would enjoy

Good for families

## Unique

Unique travel experience

Truly unique scenery

Interesting local people/cultures

Interesting/notable culinary scene

Interesting customs/traditions

Unique distillery tours

## Popular

Popular with travelers

Well-known destination

Often notice advertising

## Entertainment

Interesting festivals/fairs/events

Exciting nightlife/entertainment

Great live music

Great for theatre and the performing arts

## Luxurious

- Great place to experience fine dining
- First-class hotels/resorts
- Offers a variety of dining options
- Offers a variety of accommodations
- Noted for innovative, unique cuisine
- Great spas

## 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

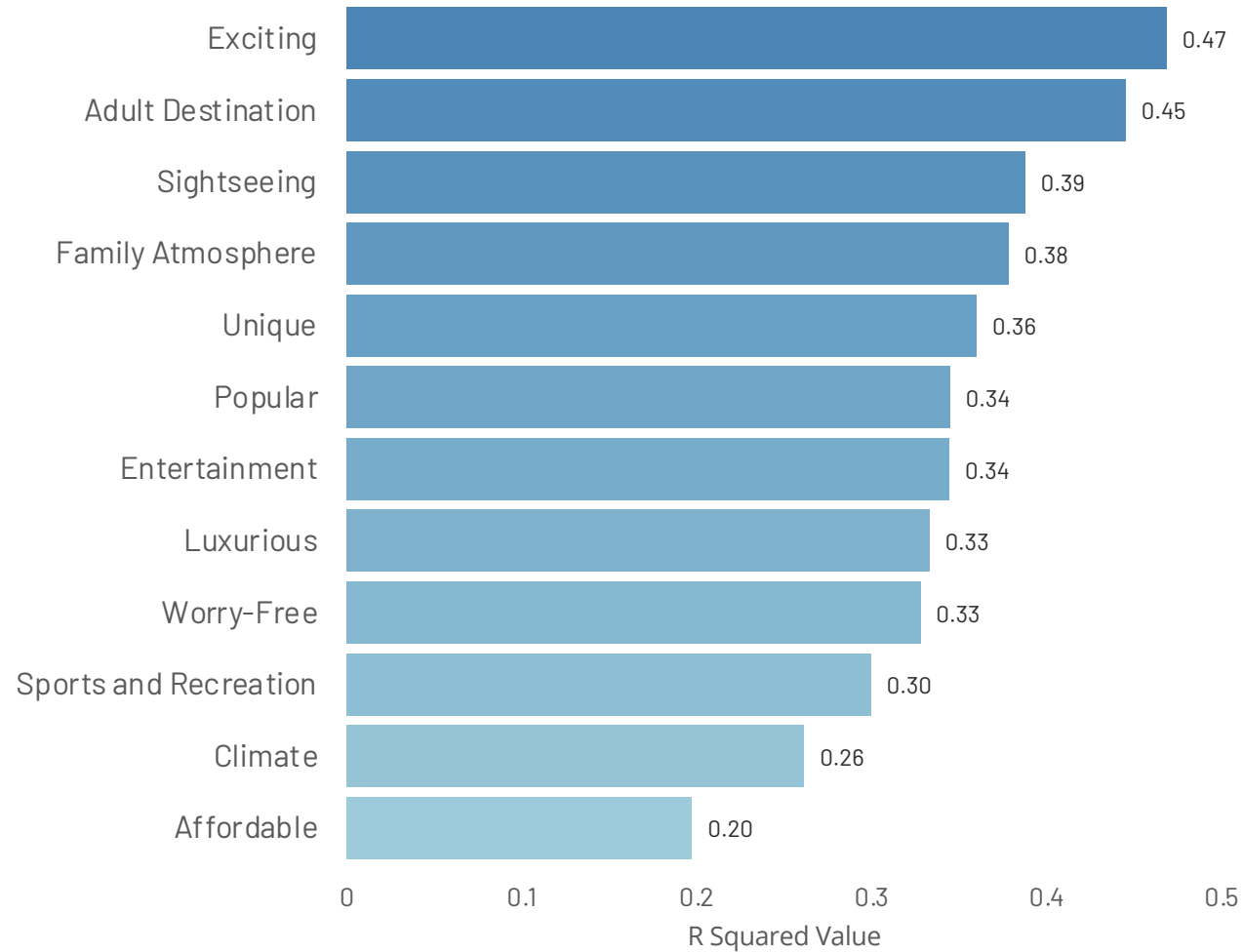
- Great climate overall
- Good weather in the spring
- Good weather in the fall
- Great for a winter vacation
- Good weather in the summer

## Affordable

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

# TRAVEL MOTIVATORS

Base: Existing 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: Existing 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

A fun place

Must see destination

Is an interesting place

An exciting place

Lots to see and do

Good for an adult vacation

Interesting cities

Great for sightseeing

Good for couples

Unique travel experience

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





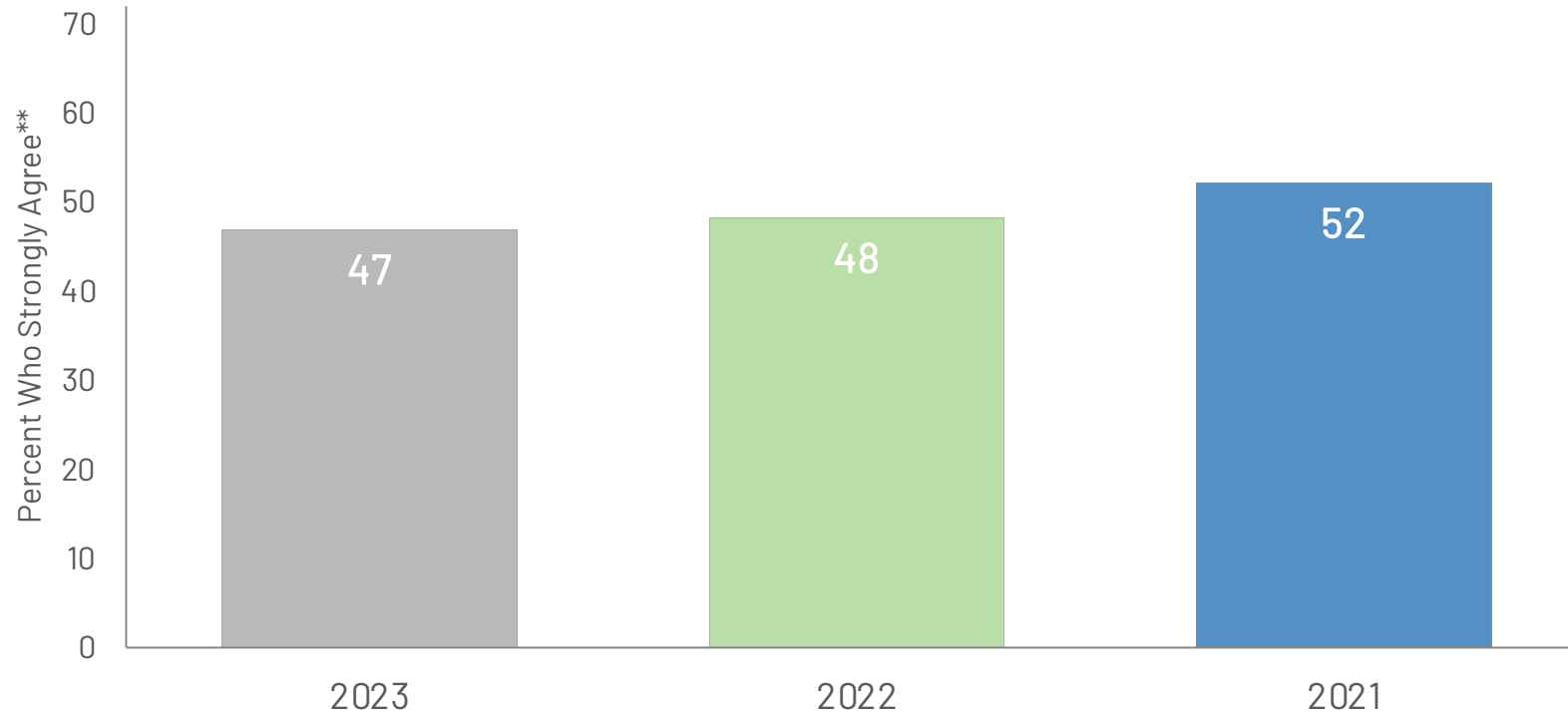
[ KENTUCKY IMAGE  
2023 vs 2022 vs 2021 ]



# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021

Base: Existing Markets

"A Place I'd Really Enjoy Visiting"

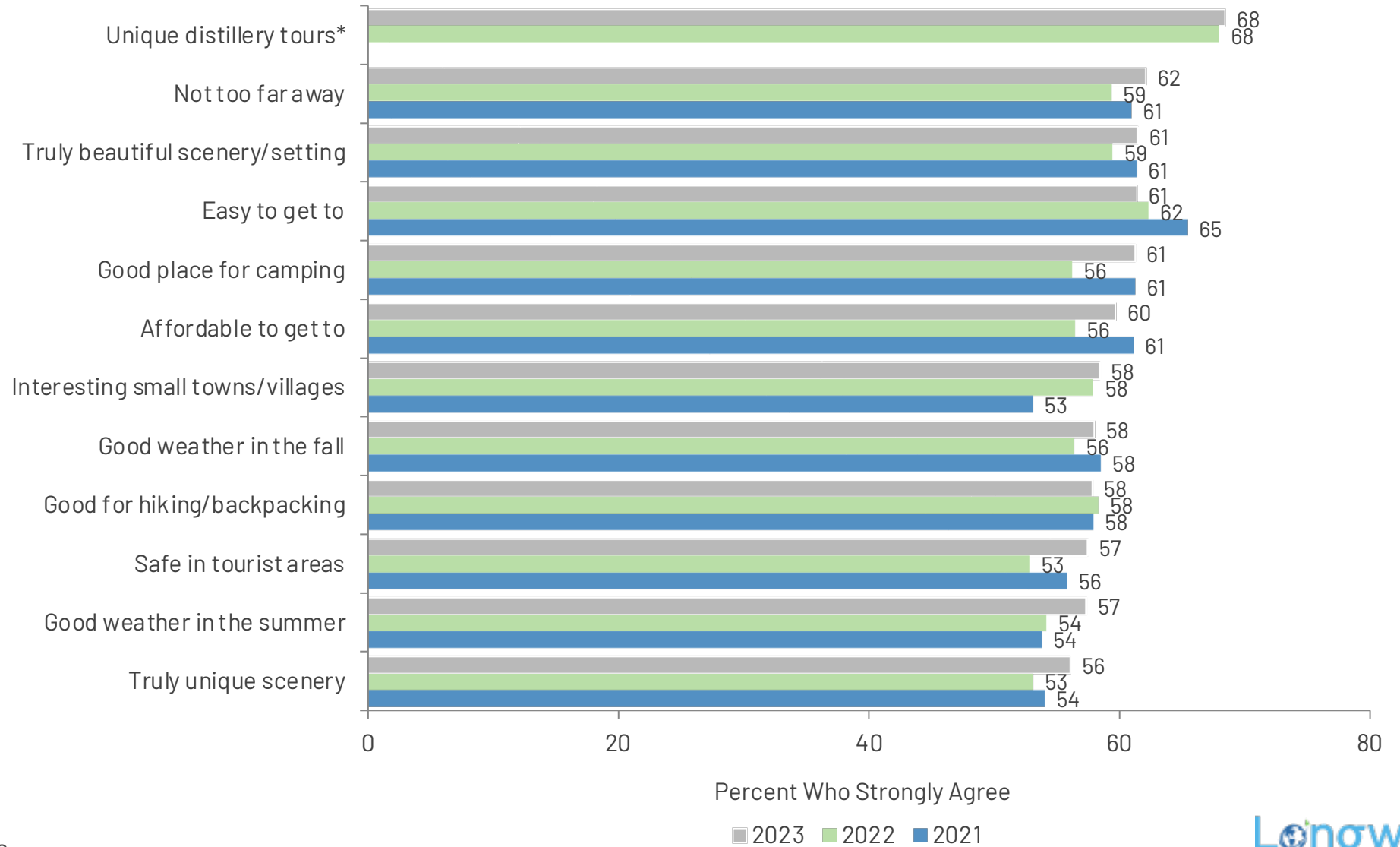


\*Saw at least one ad

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

# KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021

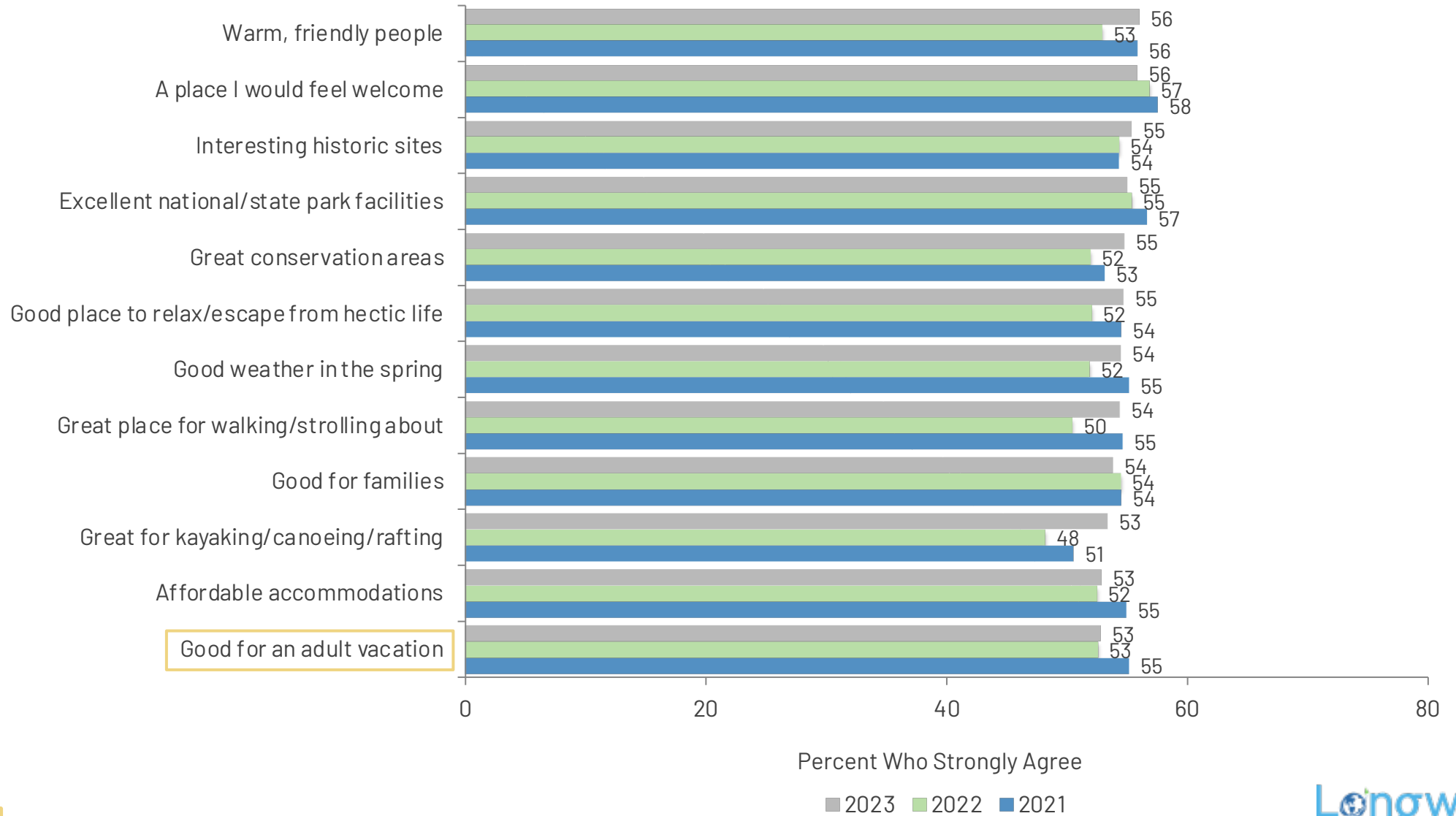
Base: Existing Markets



\*Attribute added in 2022

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

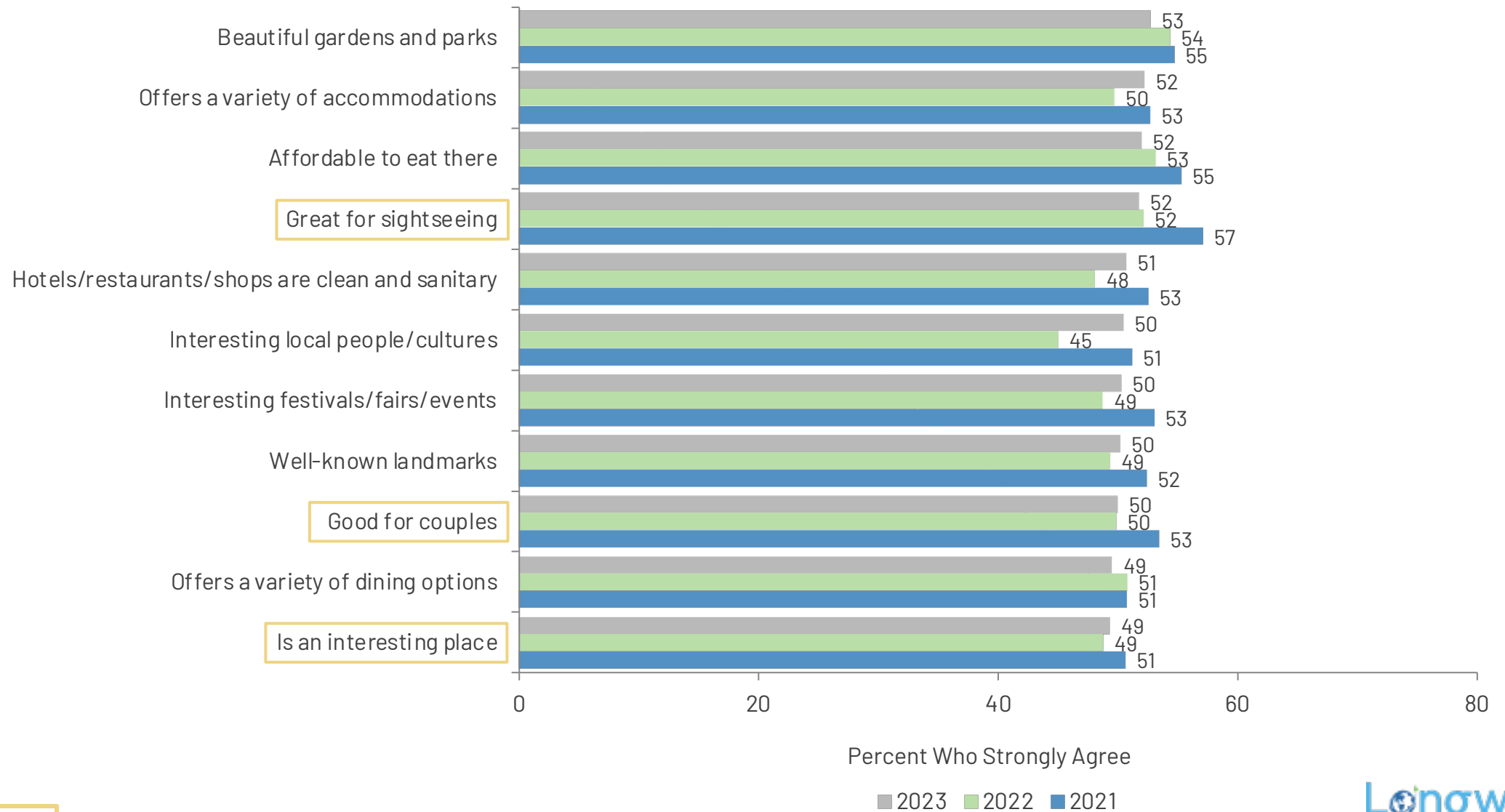
Base: Existing Markets



2023 Hot Button

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

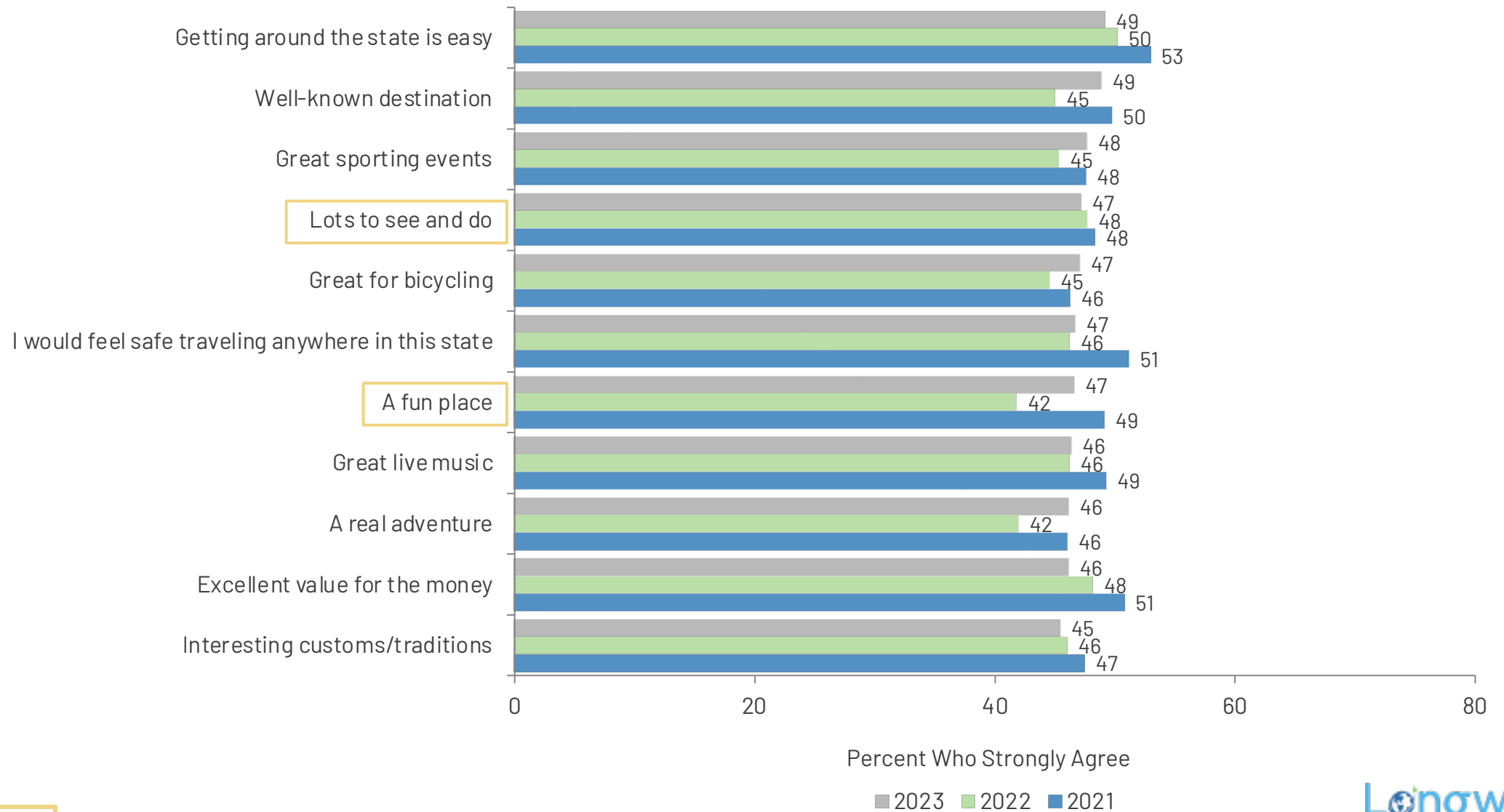
Base: Existing Markets



2023 Hot Button

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

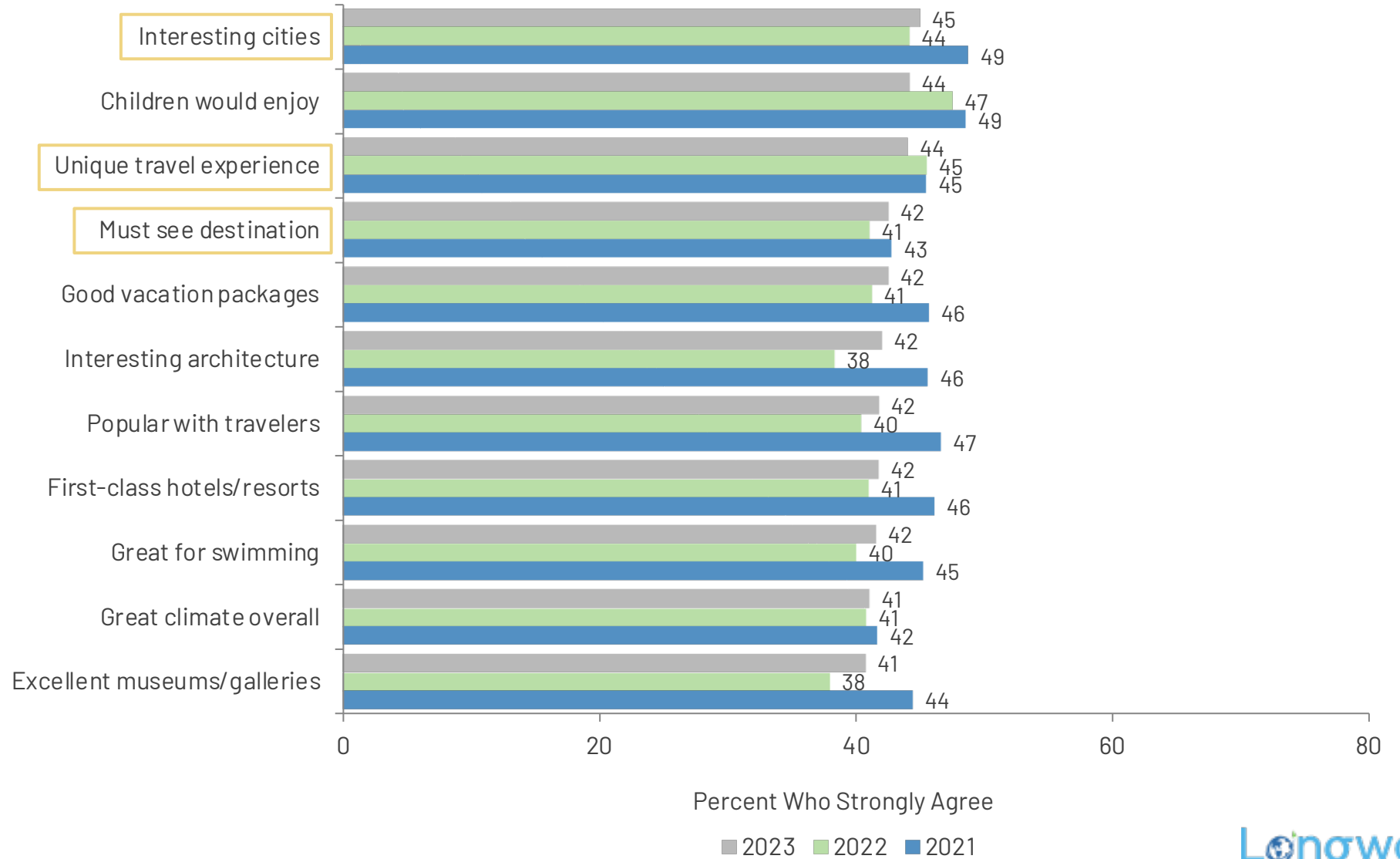
Base: Existing Markets



2023 Hot Button

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

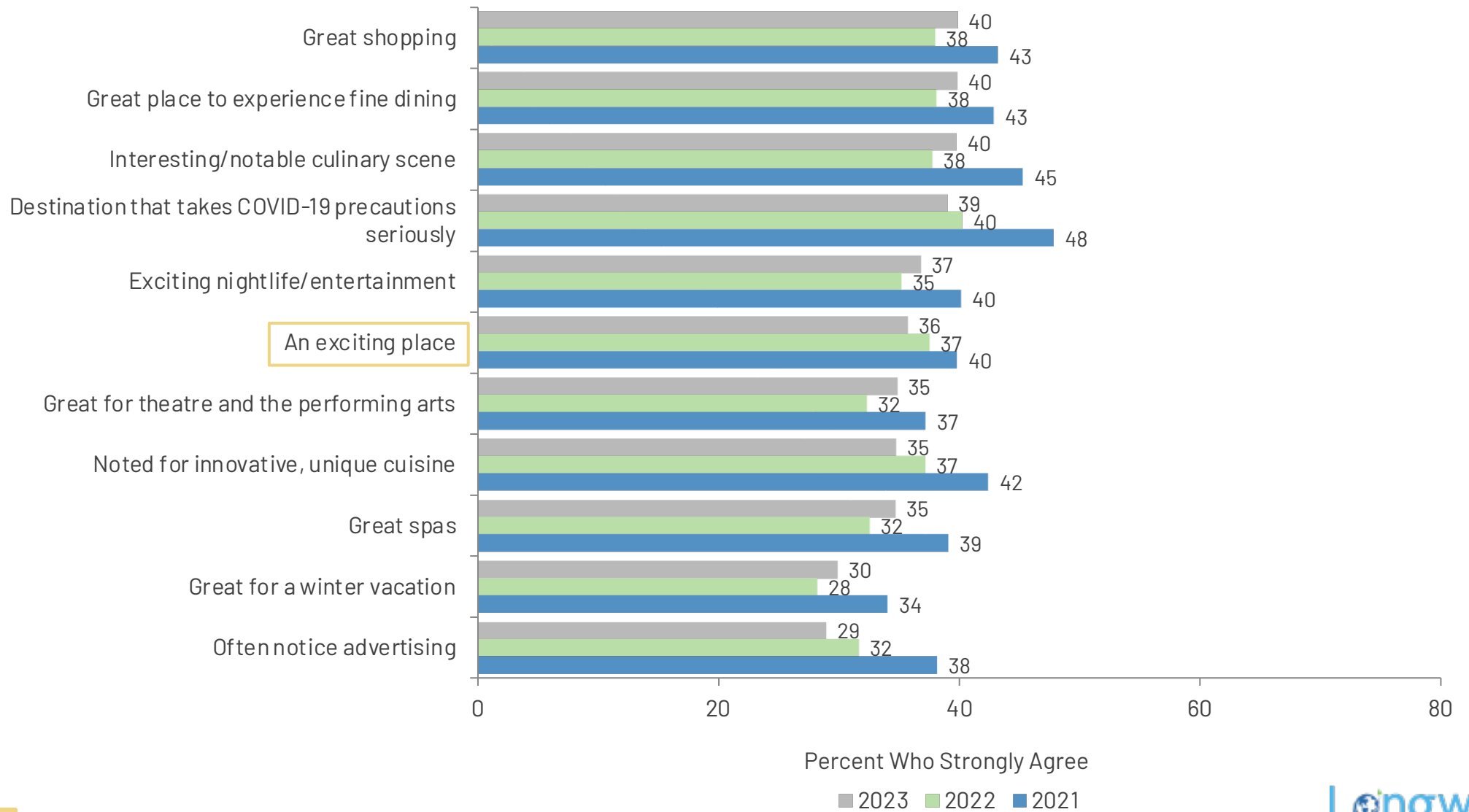
Base: Existing Markets



2023 Hot Button

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

Base: Existing Markets



2023 Hot Button





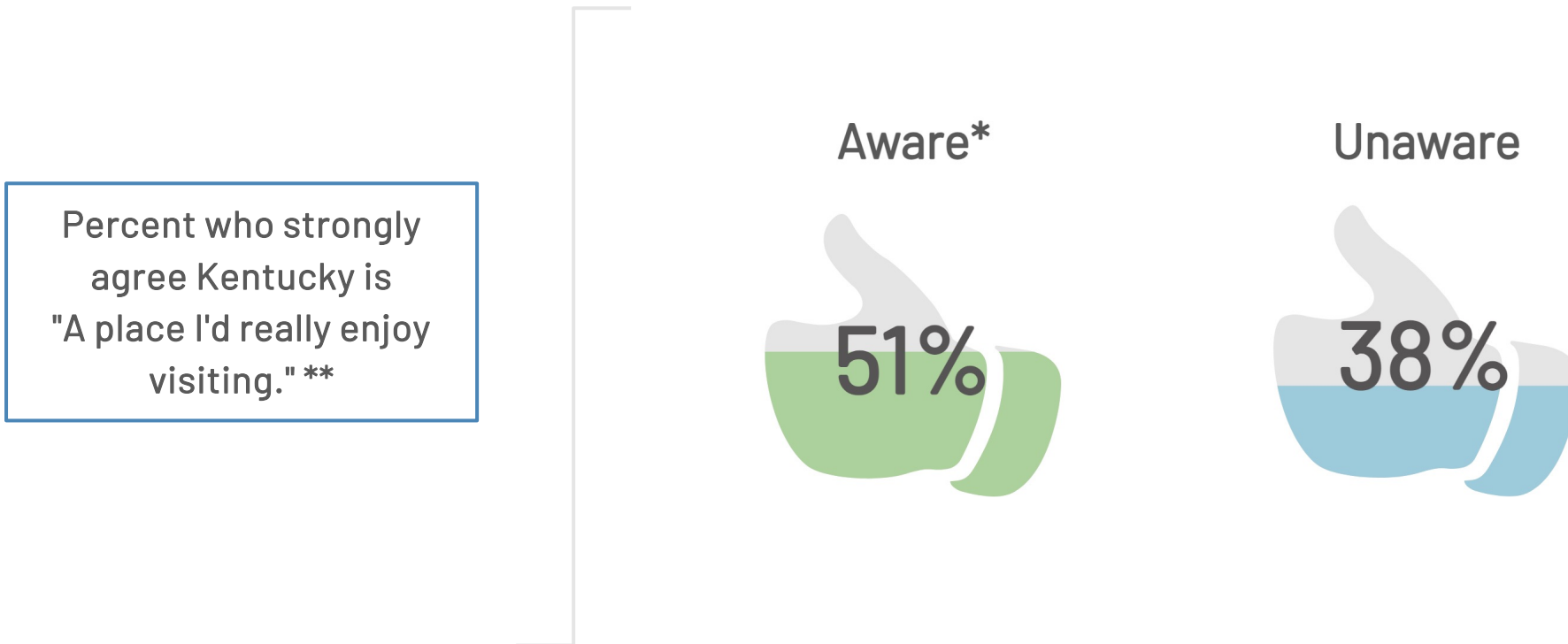
# [ ADVERTISING IMPACT ON IMAGE ]



# ADVERTISING IMPACT ON OVERALL IMAGE

Base: Existing 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

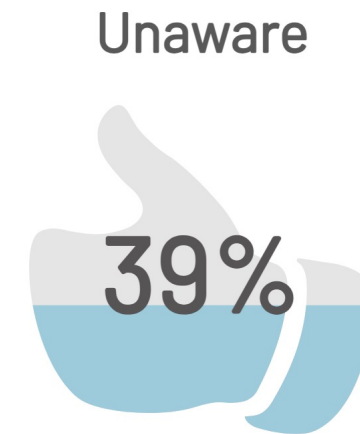
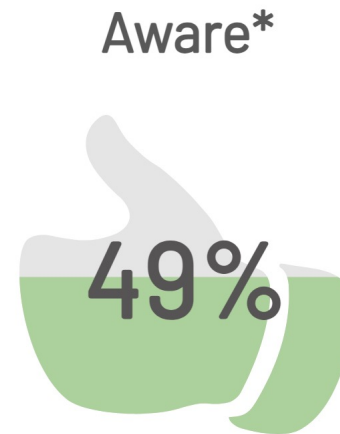
\*\*"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

# ADVERTISING IMPACT ON OVERALL IMAGE

Base: Existing 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." \*\*

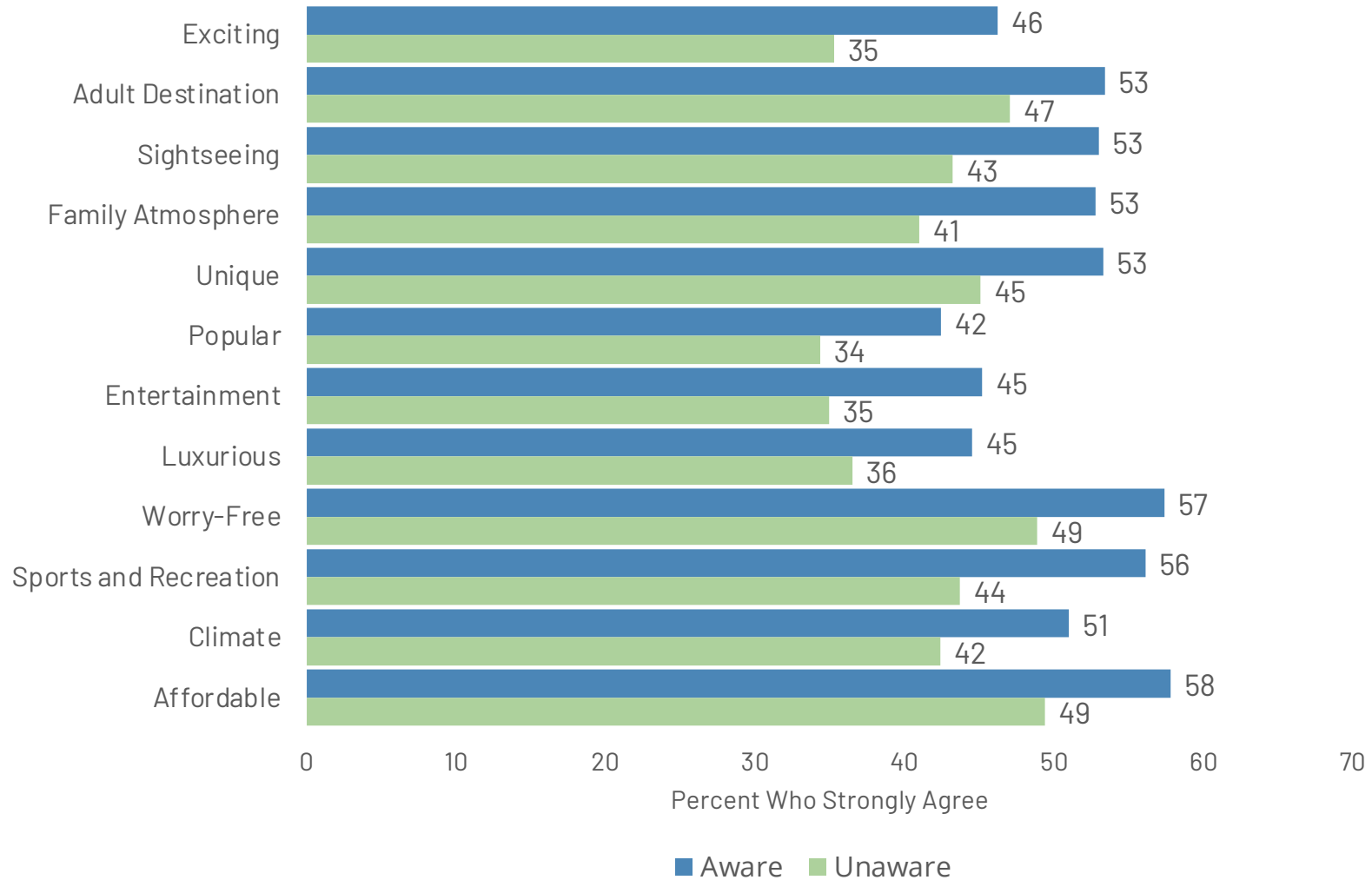


\*Saw at least one ad

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

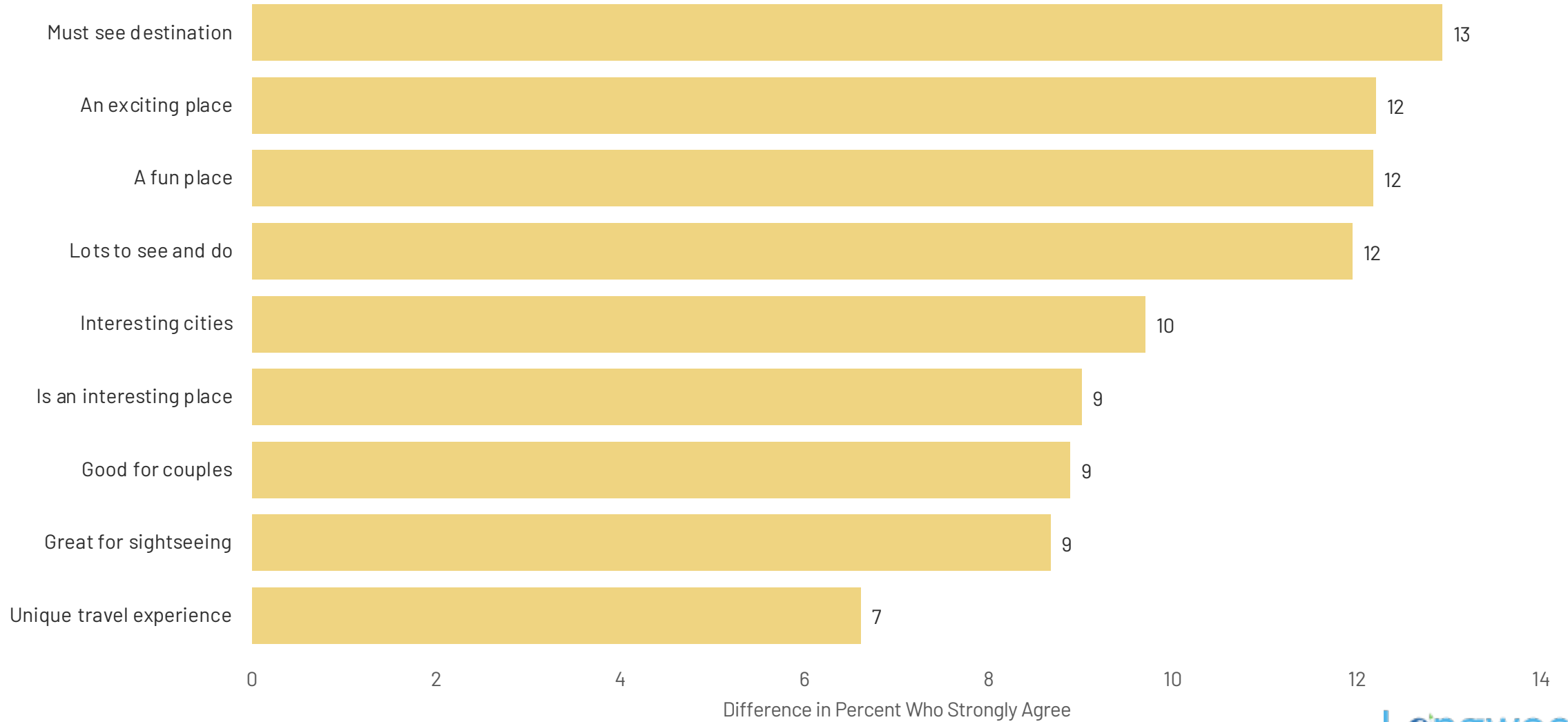
# ADVERTISING IMPACT ON IMAGE

Base: Existing Markets



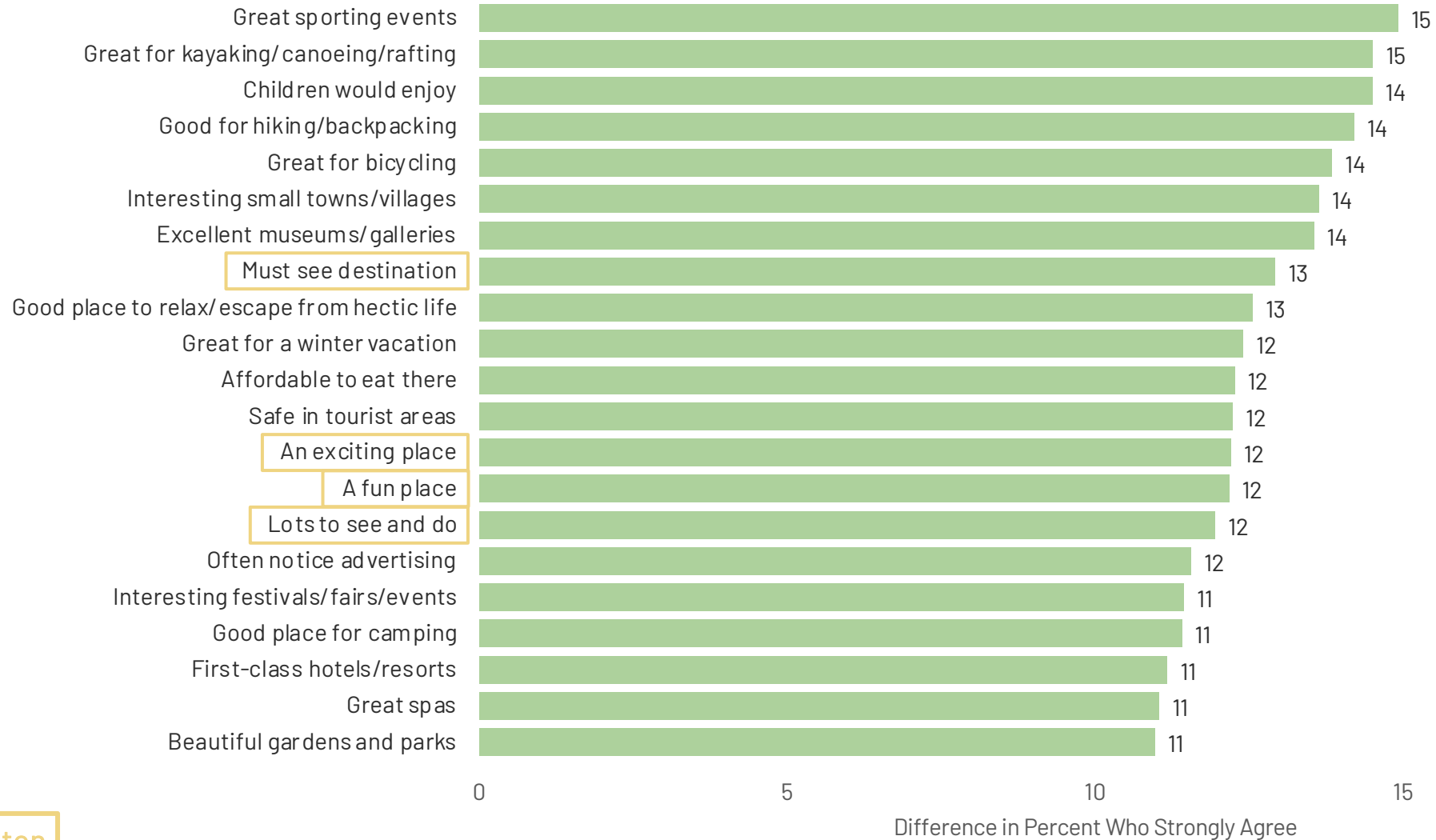
# HOT BUTTONS MOST IMPACTED BY ADVERTISING

Base: Existing Markets



# IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING

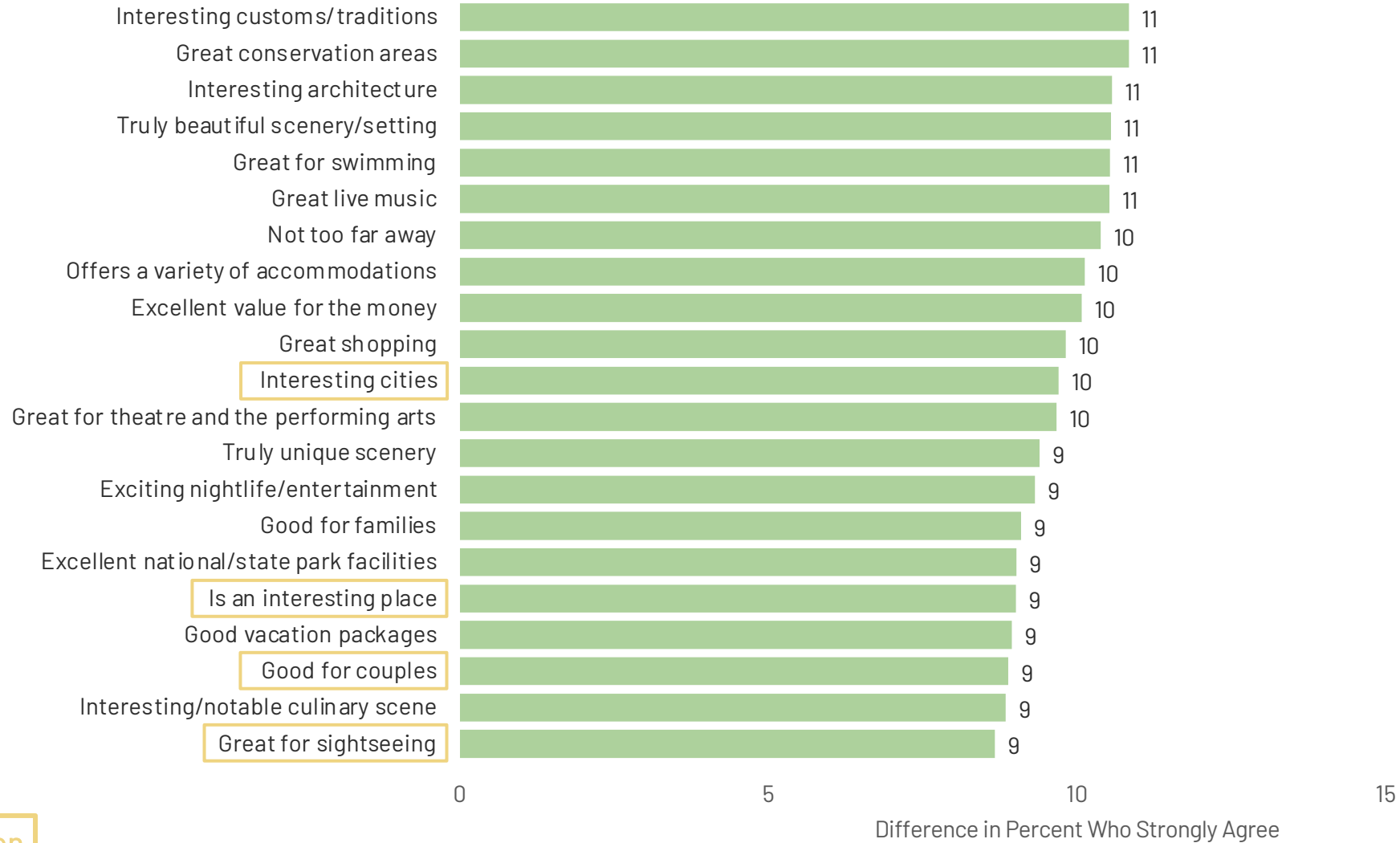
Base: Existing Markets



Hot Button

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

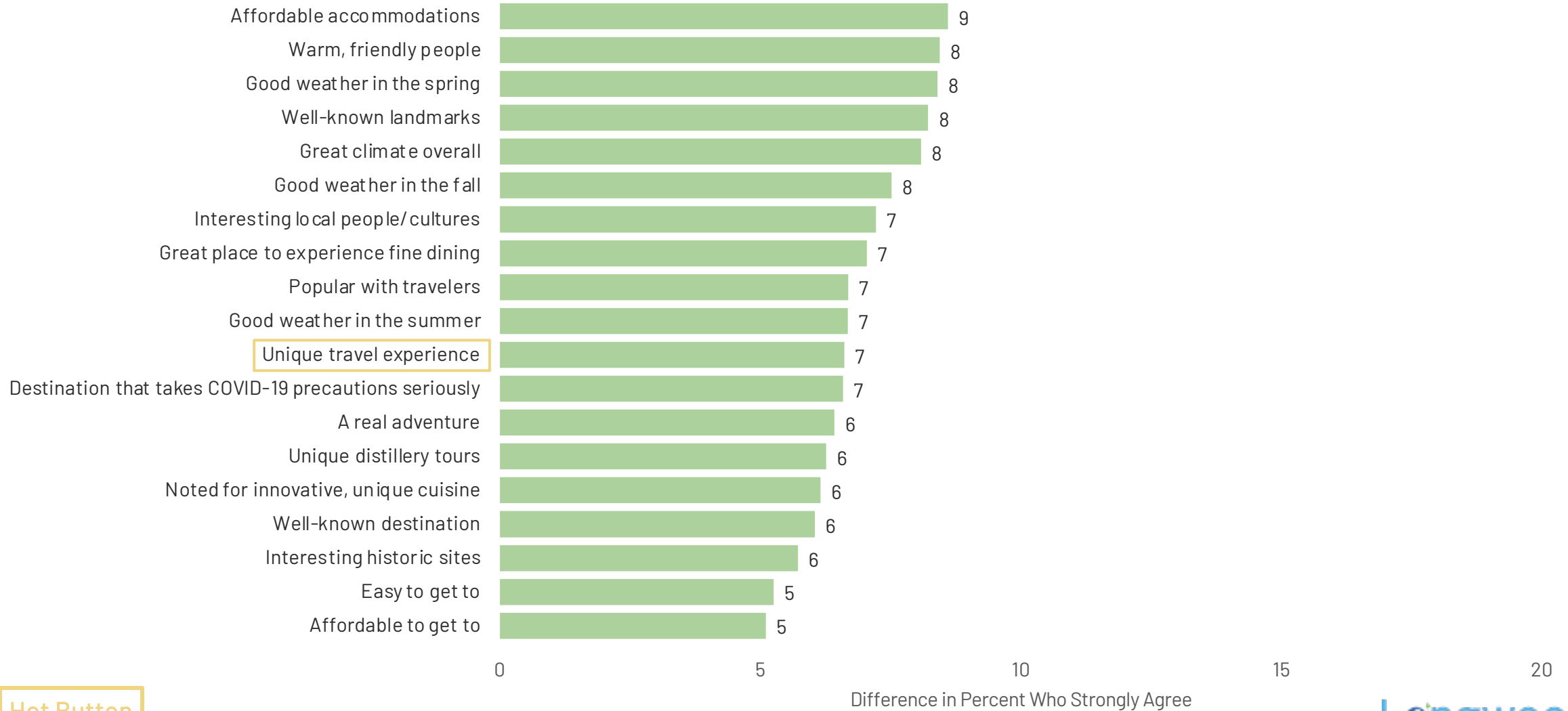
Base: Existing Markets



Hot Button

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

Base: Existing Markets



Hot Button



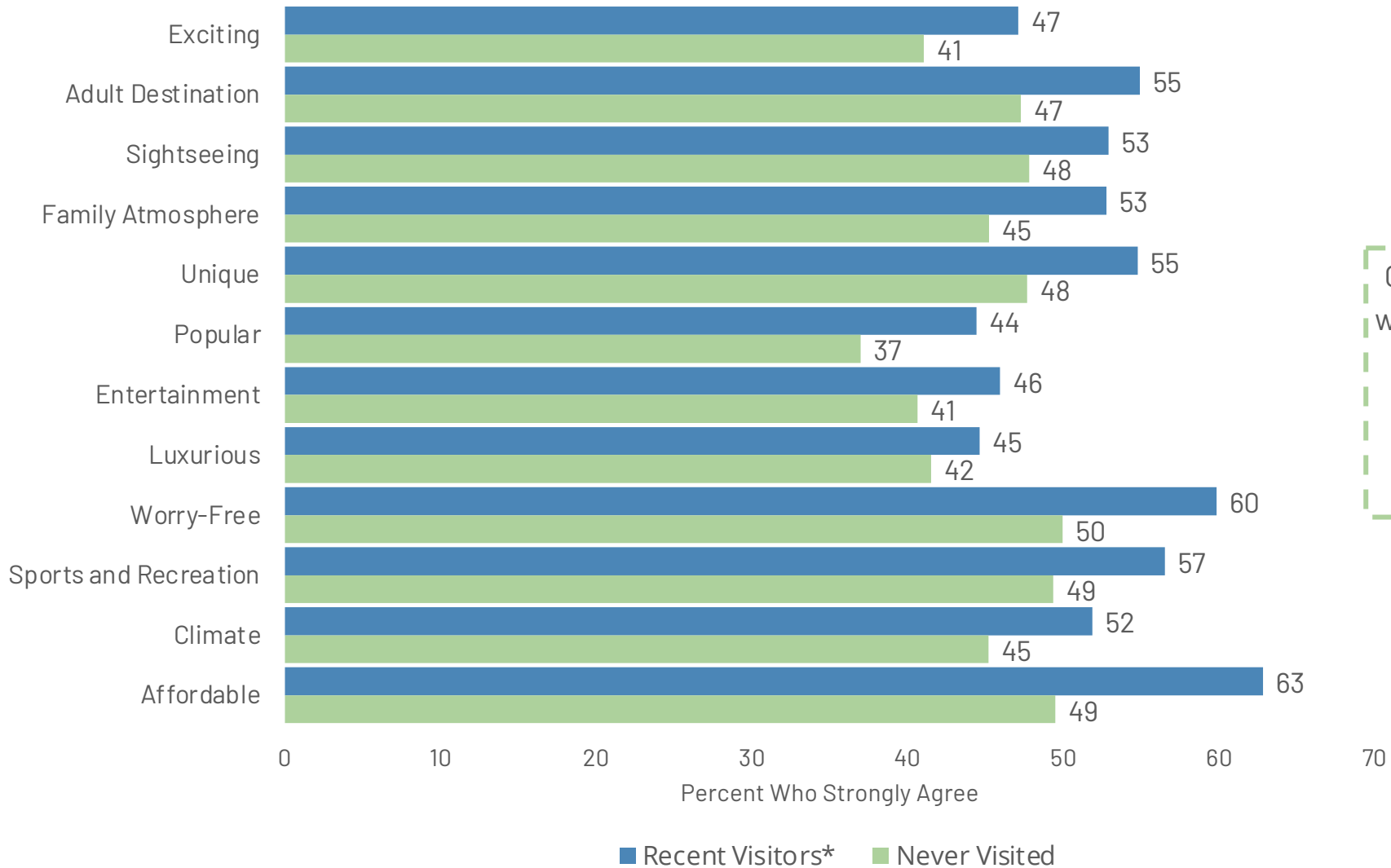


[PRODUCT DELIVERY]

TEAM  KENTUCKY®

# PRODUCT VS. IMAGE

Base: Existing Markets

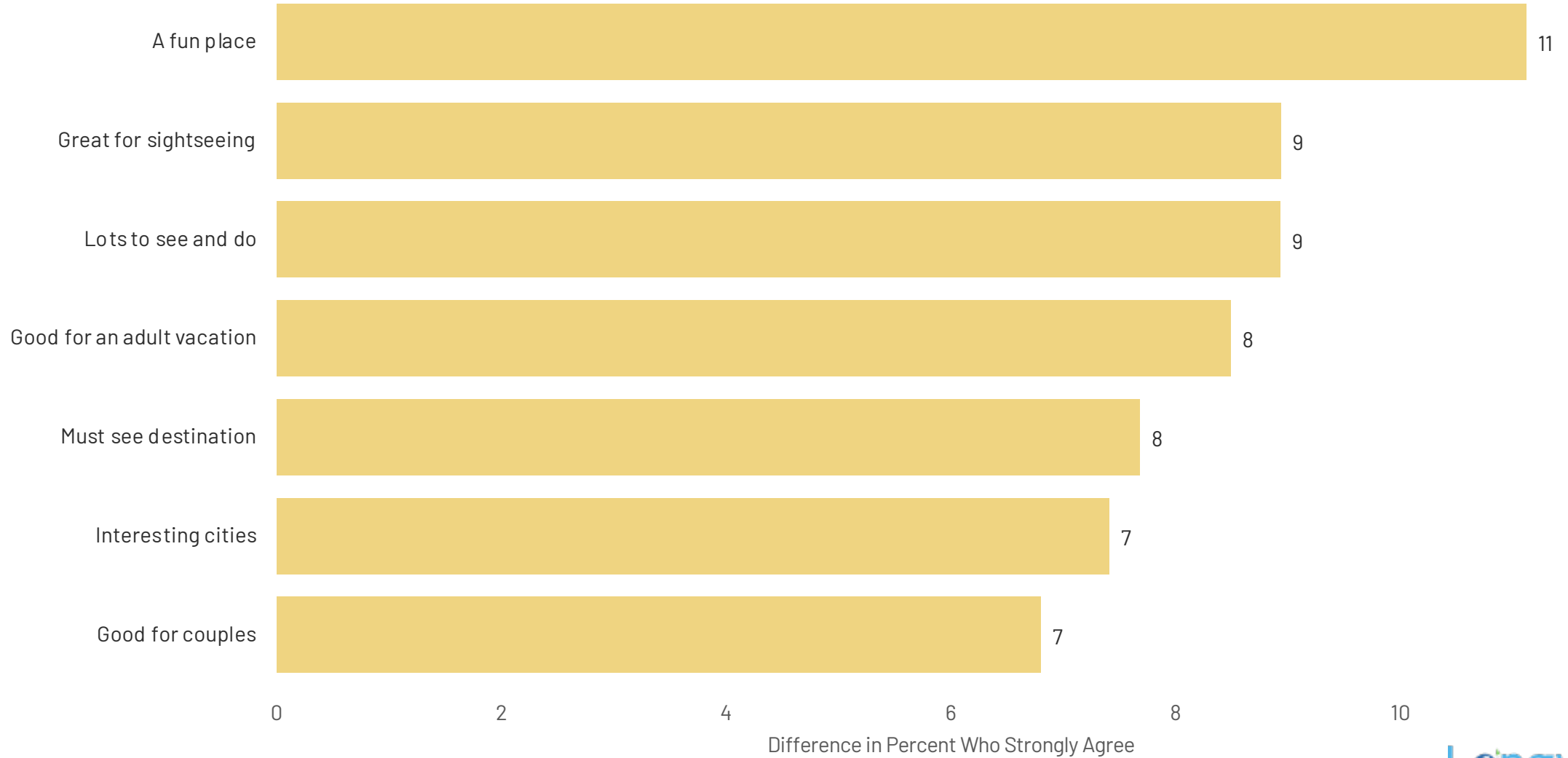


Comparing the image ratings of people who have **never visited** Kentucky versus that of those who have **visited in the past two years**, we have a measure of **“product delivery,”** the relative satisfaction of the two groups.

\* Visited in the past 2 years

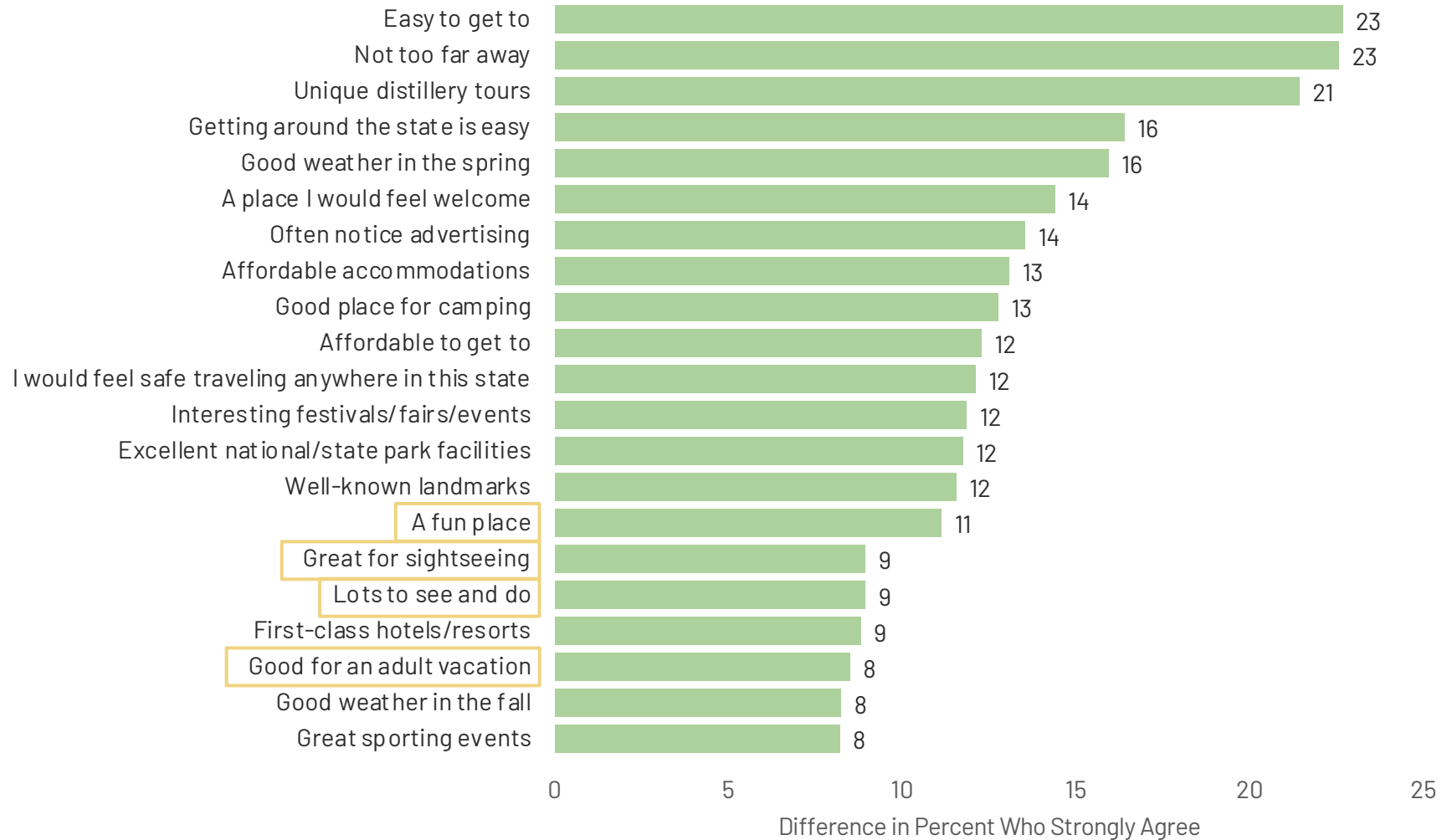
# TOP PRODUCT STRENGTHS VS IMAGE - HOT BUTTONS

Base: Existing Markets



# TOP PRODUCT STRENGTHS VS. IMAGE

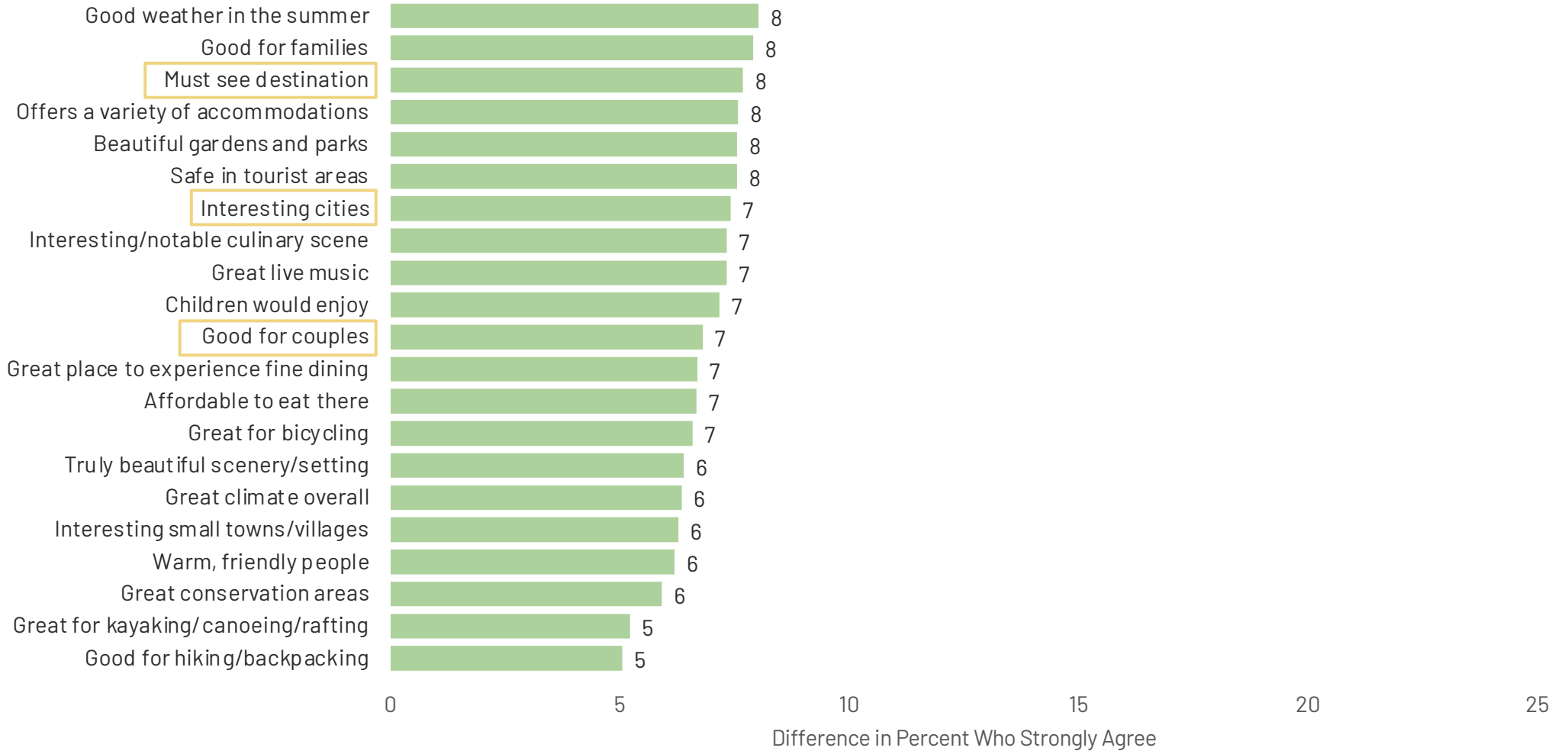
Base: Existing Markets



Hot Button

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

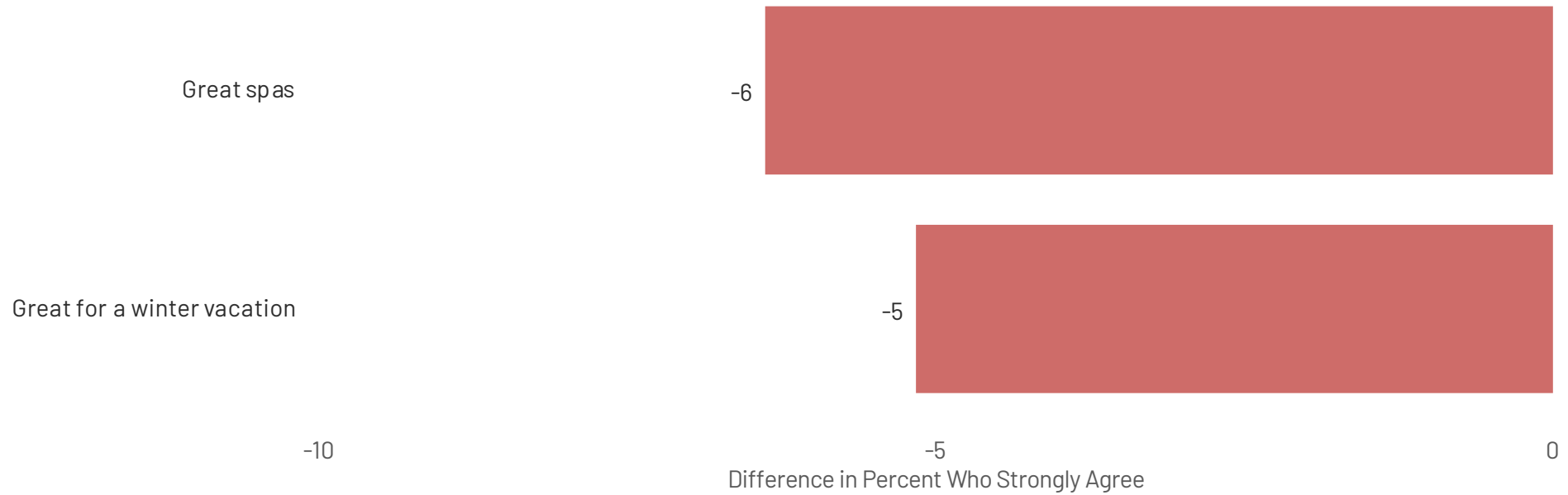
Base: Existing Markets



Hot Button

# TOP PRODUCT WEAKNESSES VS. IMAGE

Base: Existing Markets



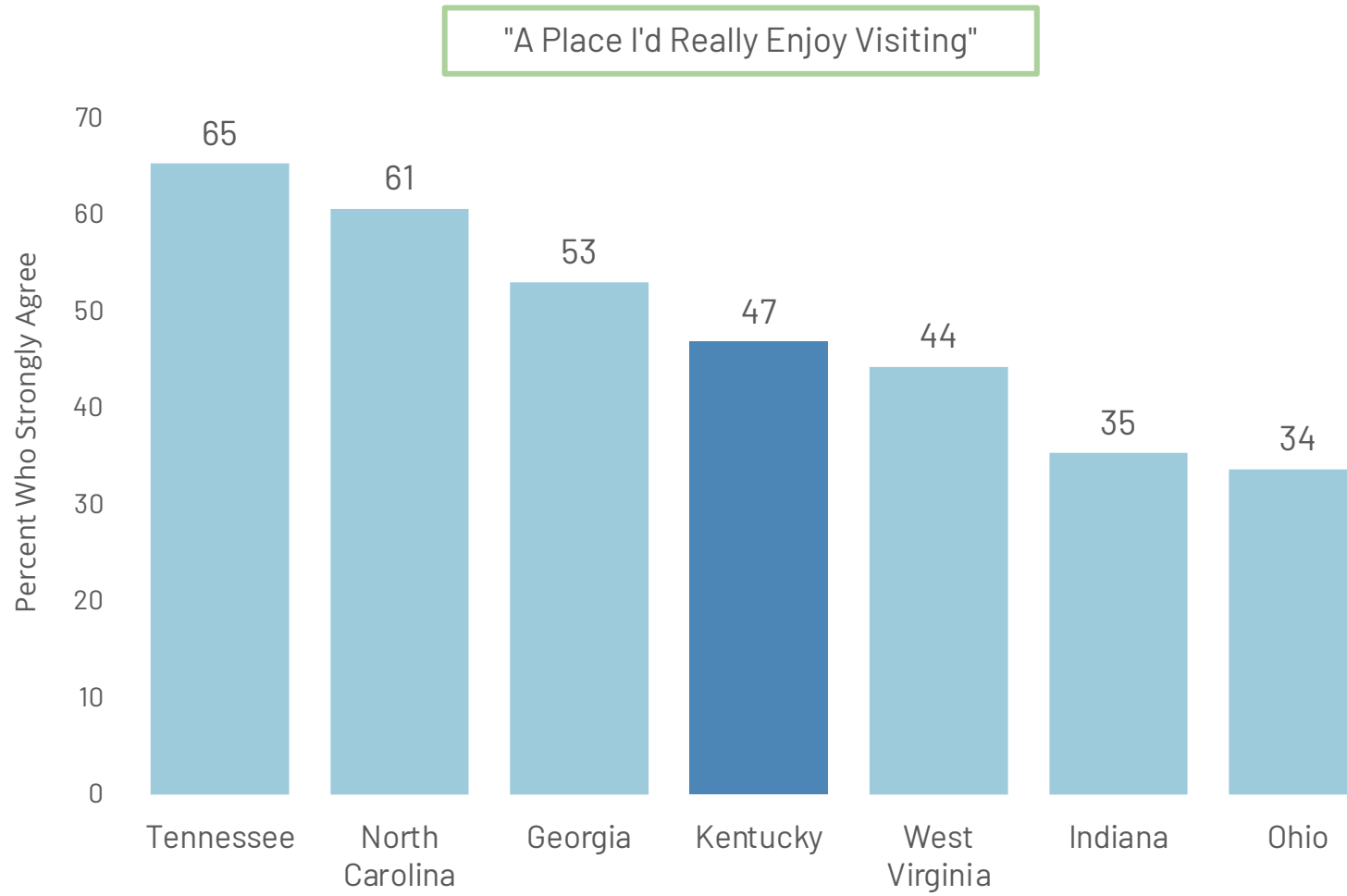


[IMAGE VS. THE COMPETITION]



# OVERALL IMAGE VS. COMPETITION

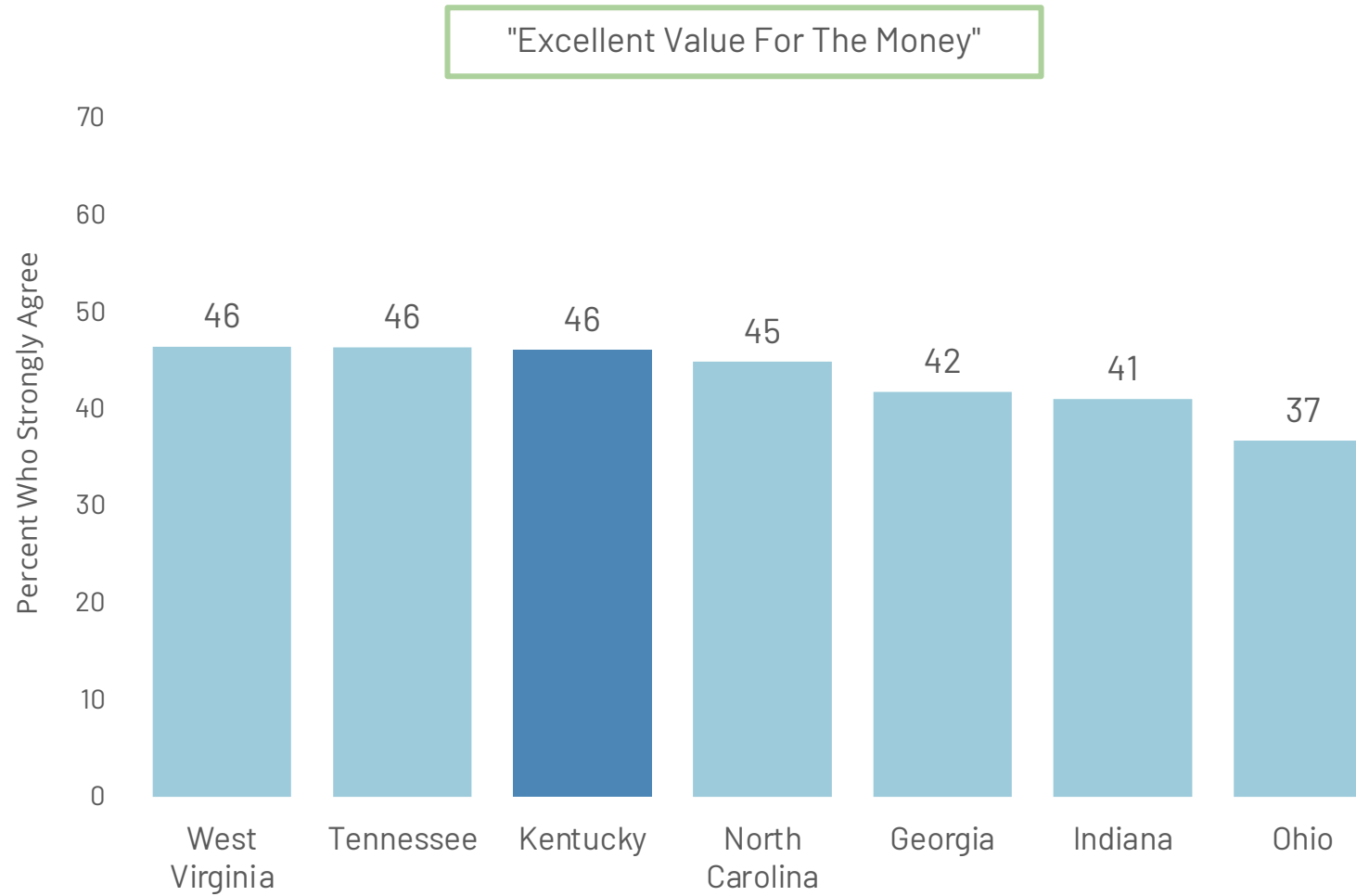
Base: Existing Markets





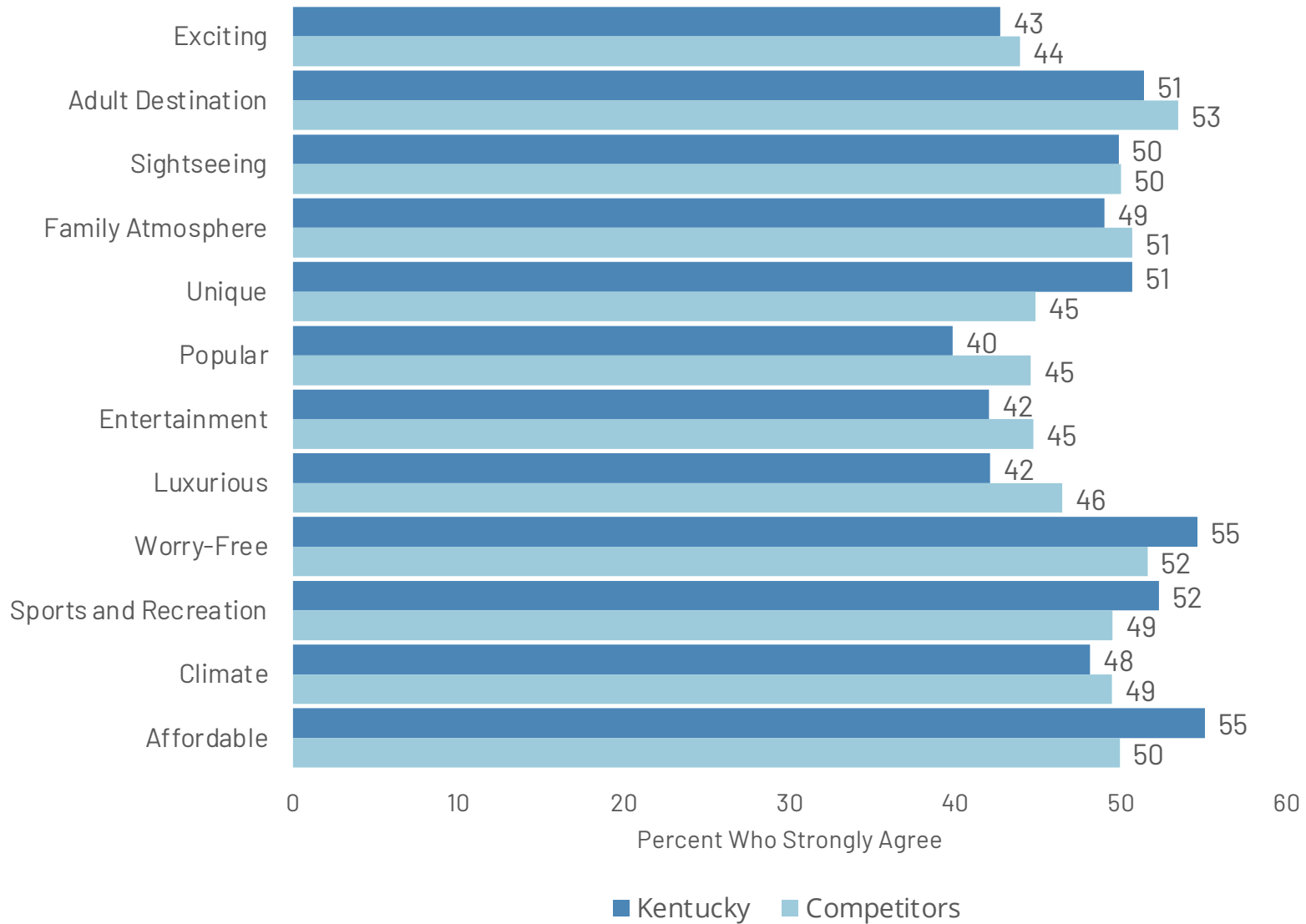
# OVERALL IMAGE VS. COMPETITION

Base: Existing Markets



# OVERALL IMAGE VS. COMPETITION

Base: Existing Markets



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

# IMAGE VS. COMPETITION - EXCITING

Base: Existing Markets



EXCITING

Kentucky\*

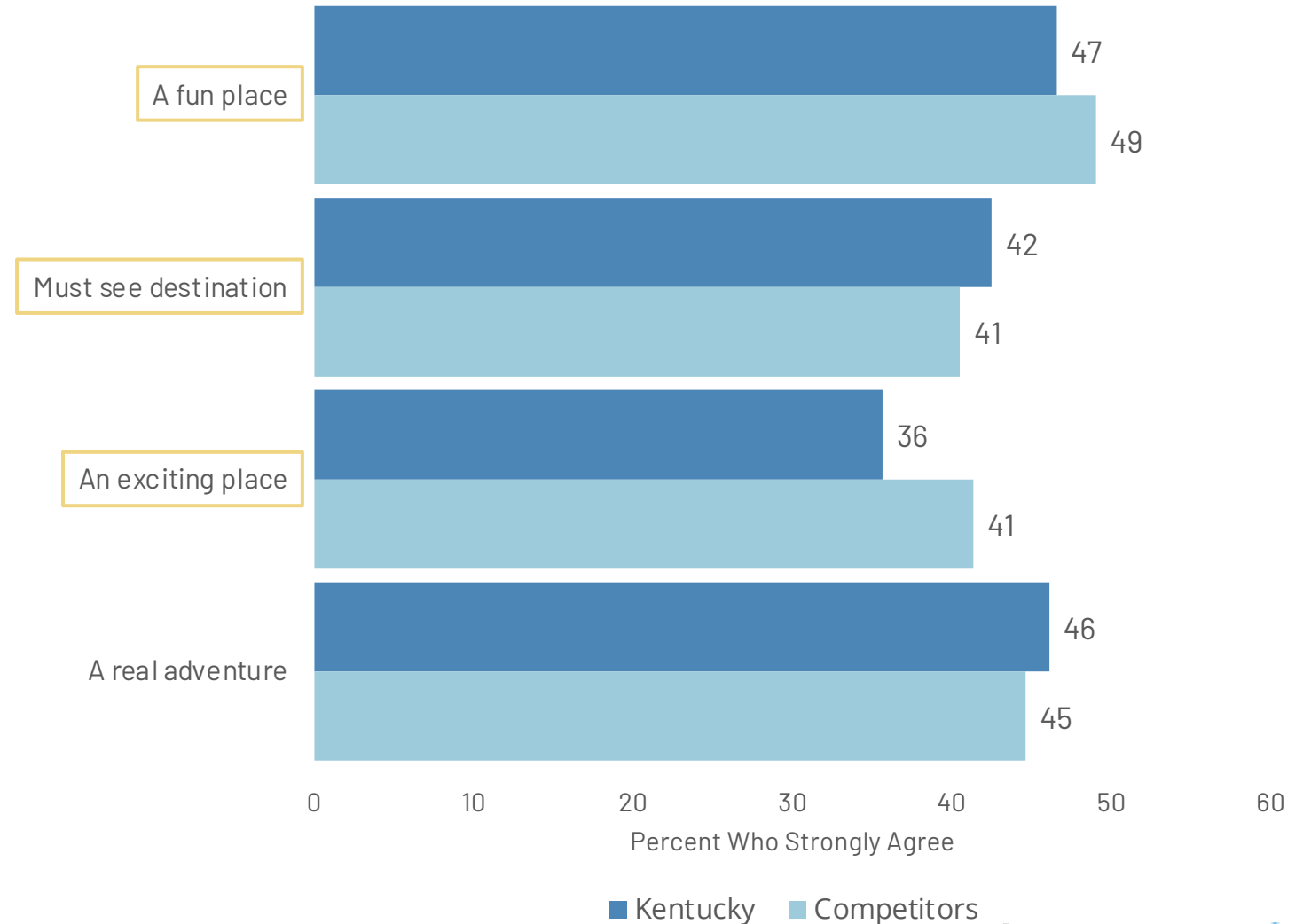
43

Competitors\*

44

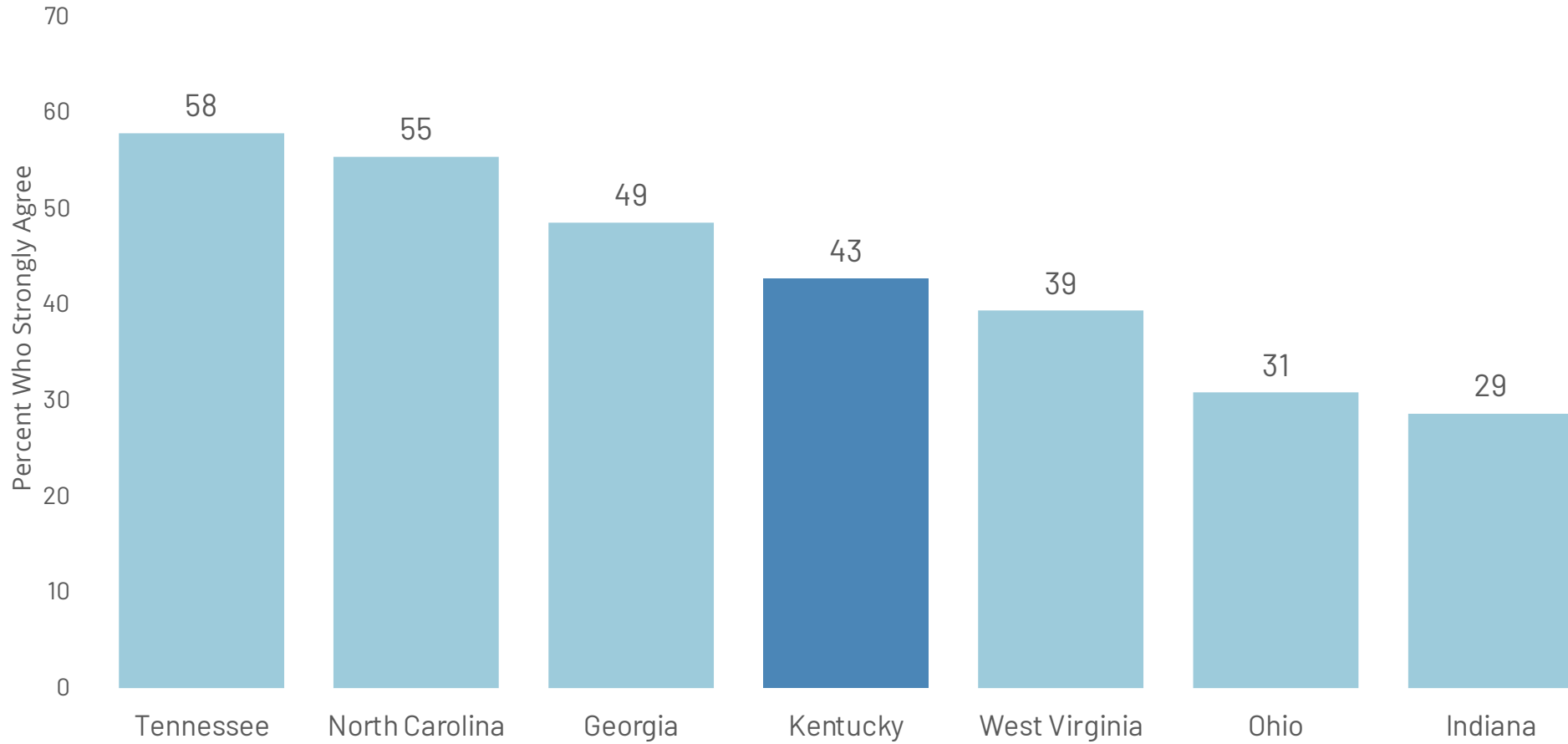
Hot Button

\*Percent who strongly agree



# IMAGE VS. COMPETITION - EXCITING

Base: Existing Markets



# IMAGE VS. COMPETITION - ADULT DESTINATION

Base: Existing Markets



## ADULT DESTINATION

Kentucky\*

51

Competitors\*

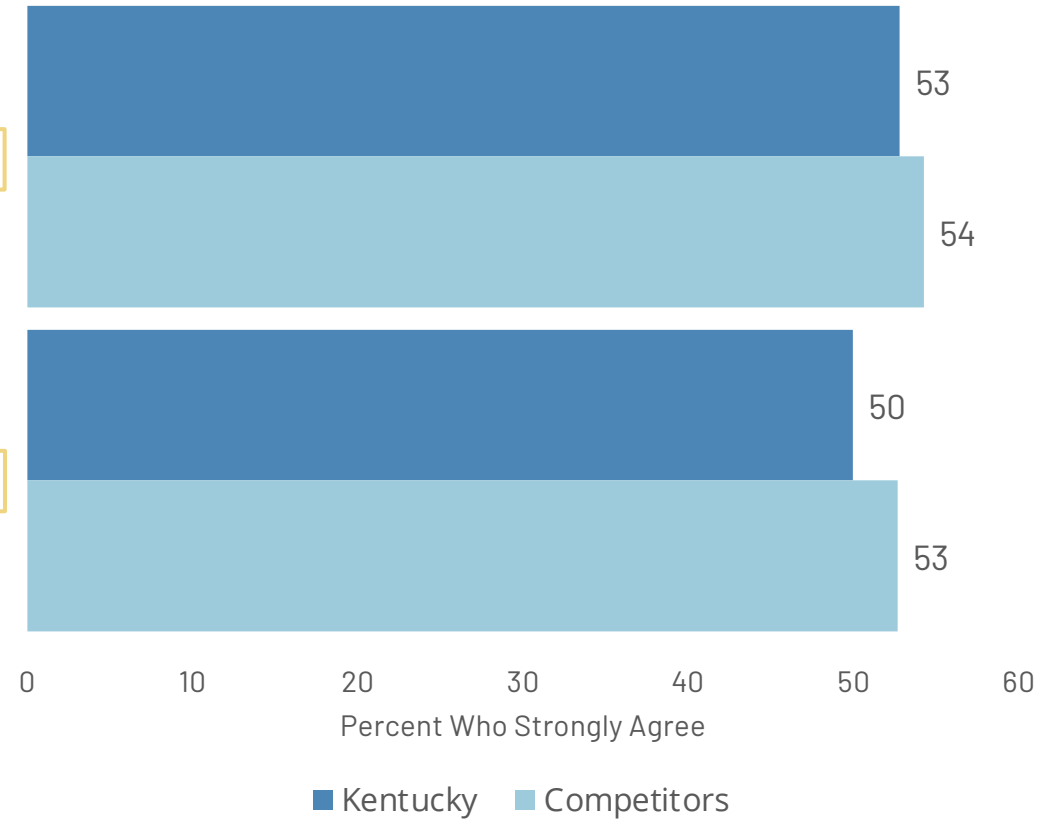
53

Hot Button

\*Percent who strongly agree

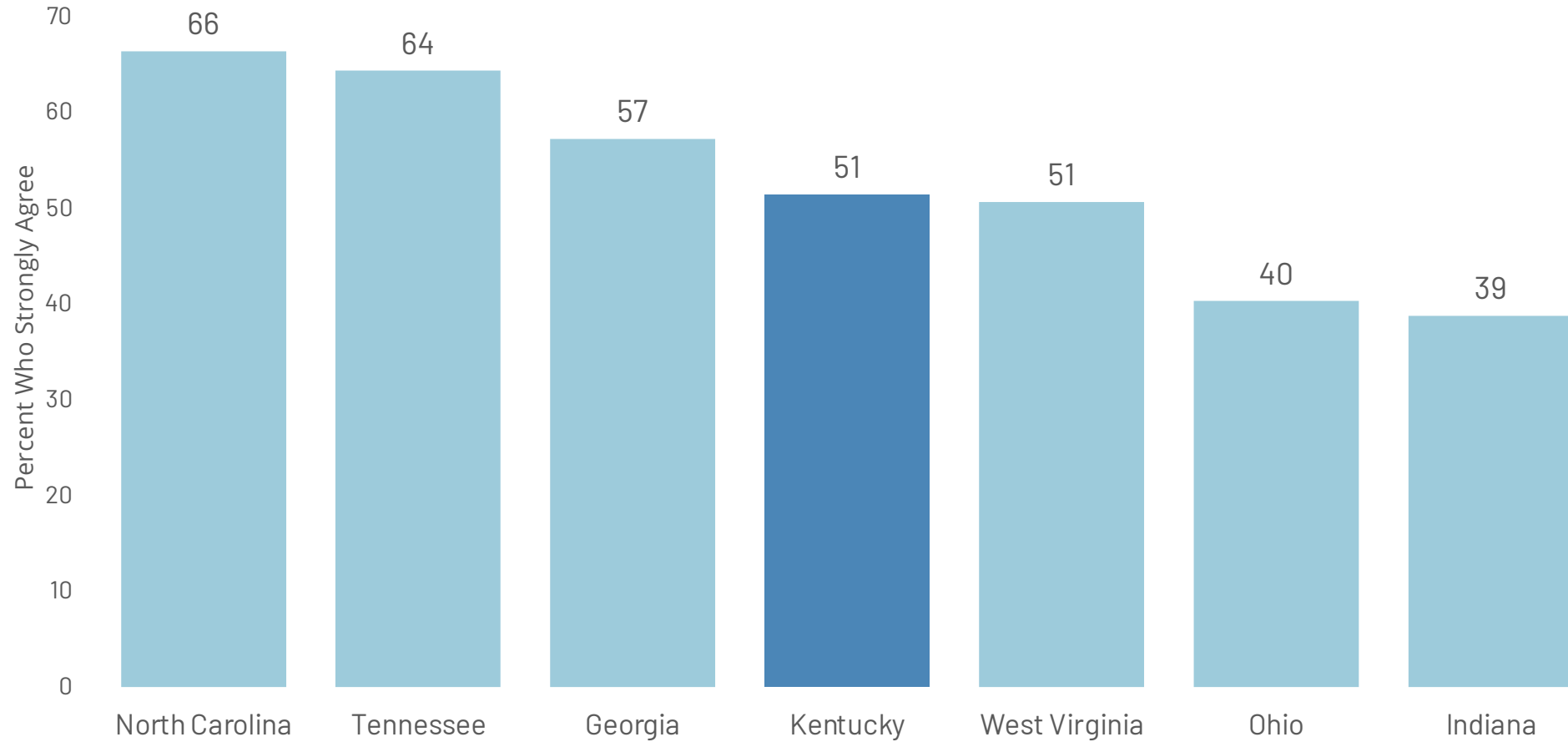
Good for an adult vacation

Good for couples

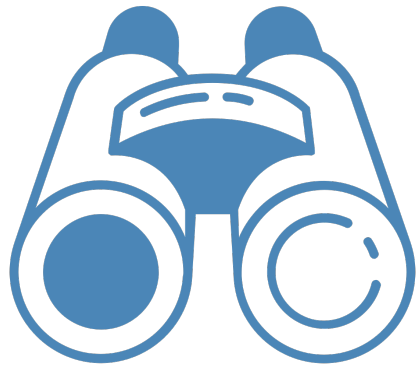


# IMAGE VS. COMPETITION - ADULT DESTINATION

Base: Existing Markets



# IMAGE VS. COMPETITION - SIGHTSEEING



## SIGHTSEEING

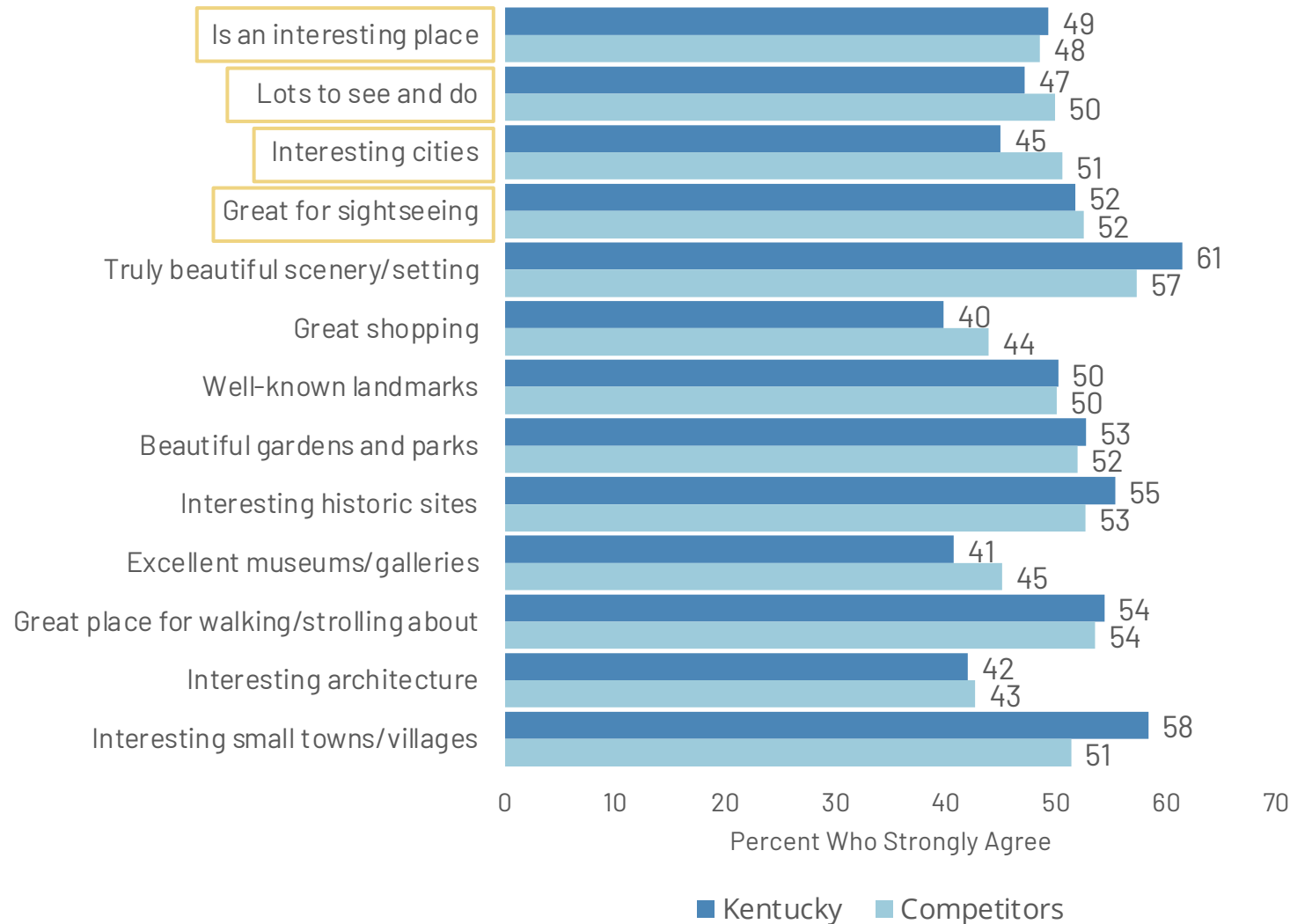
Kentucky\*

50

Competitors\*

50

Base: Existing Markets

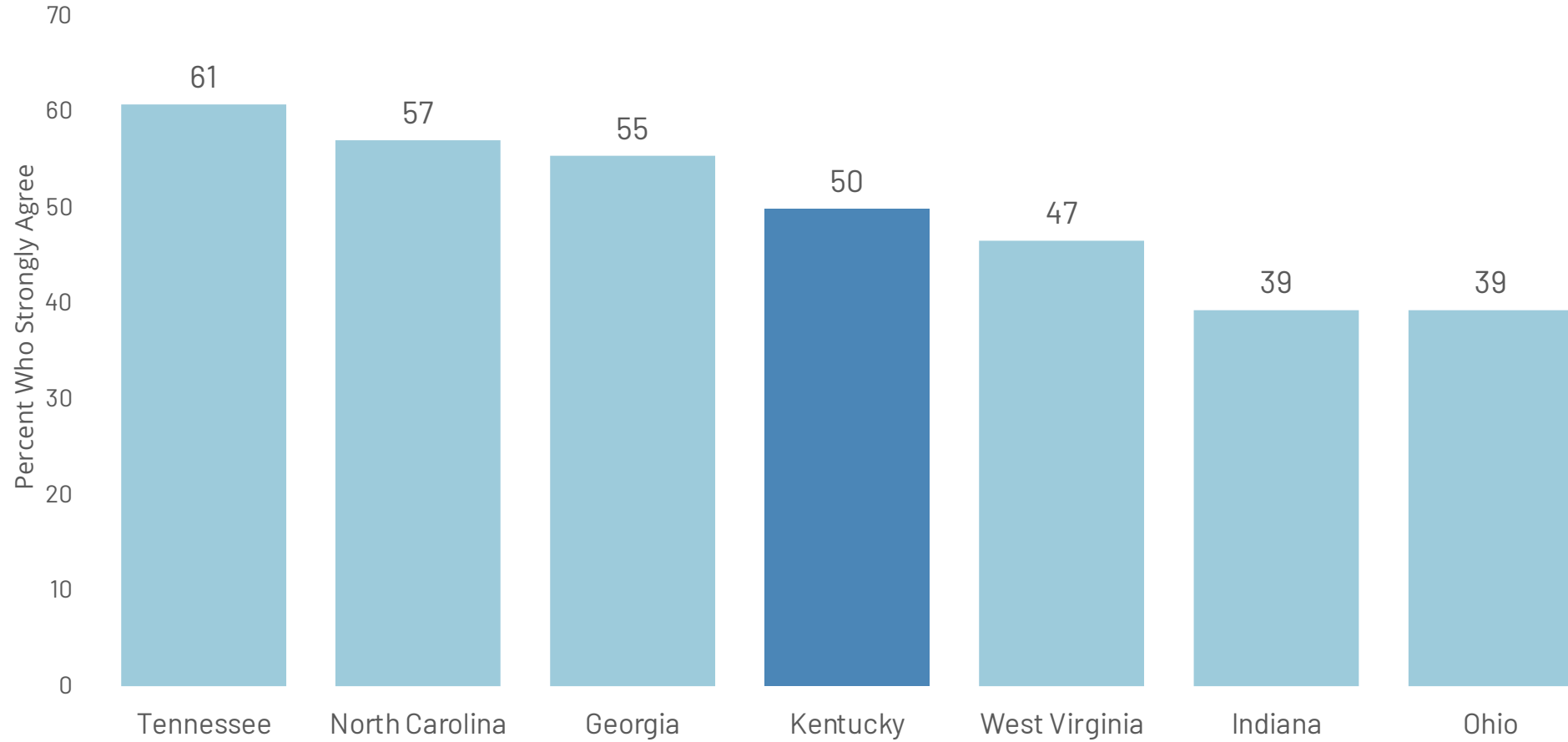


Hot Button

\*Percent who strongly agree

# IMAGE VS. COMPETITION - SIGHTSEEING

Base: Existing Markets





# IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

Base: Existing Markets



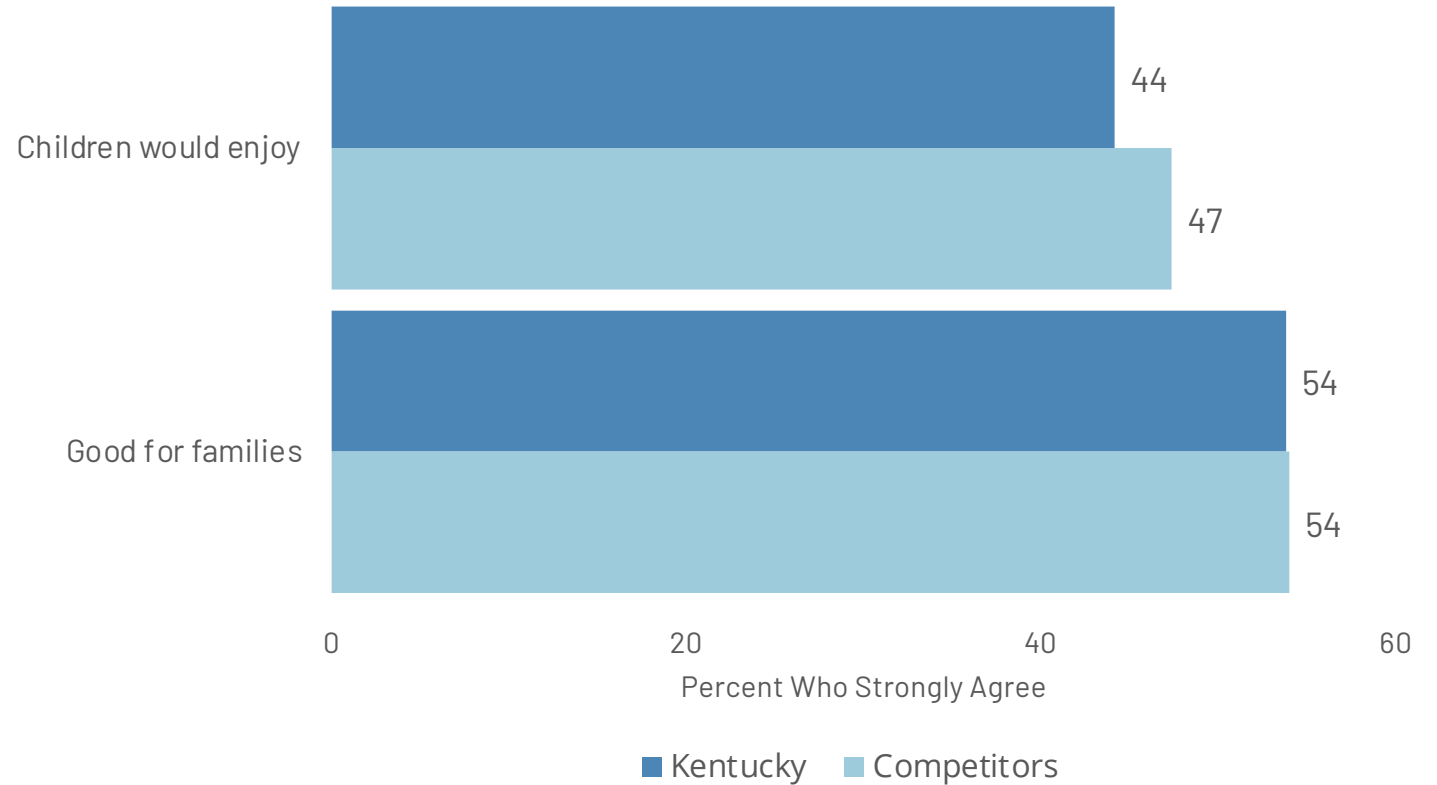
## FAMILY ATMOSPHERE

Kentucky\*

49

Competitors\*

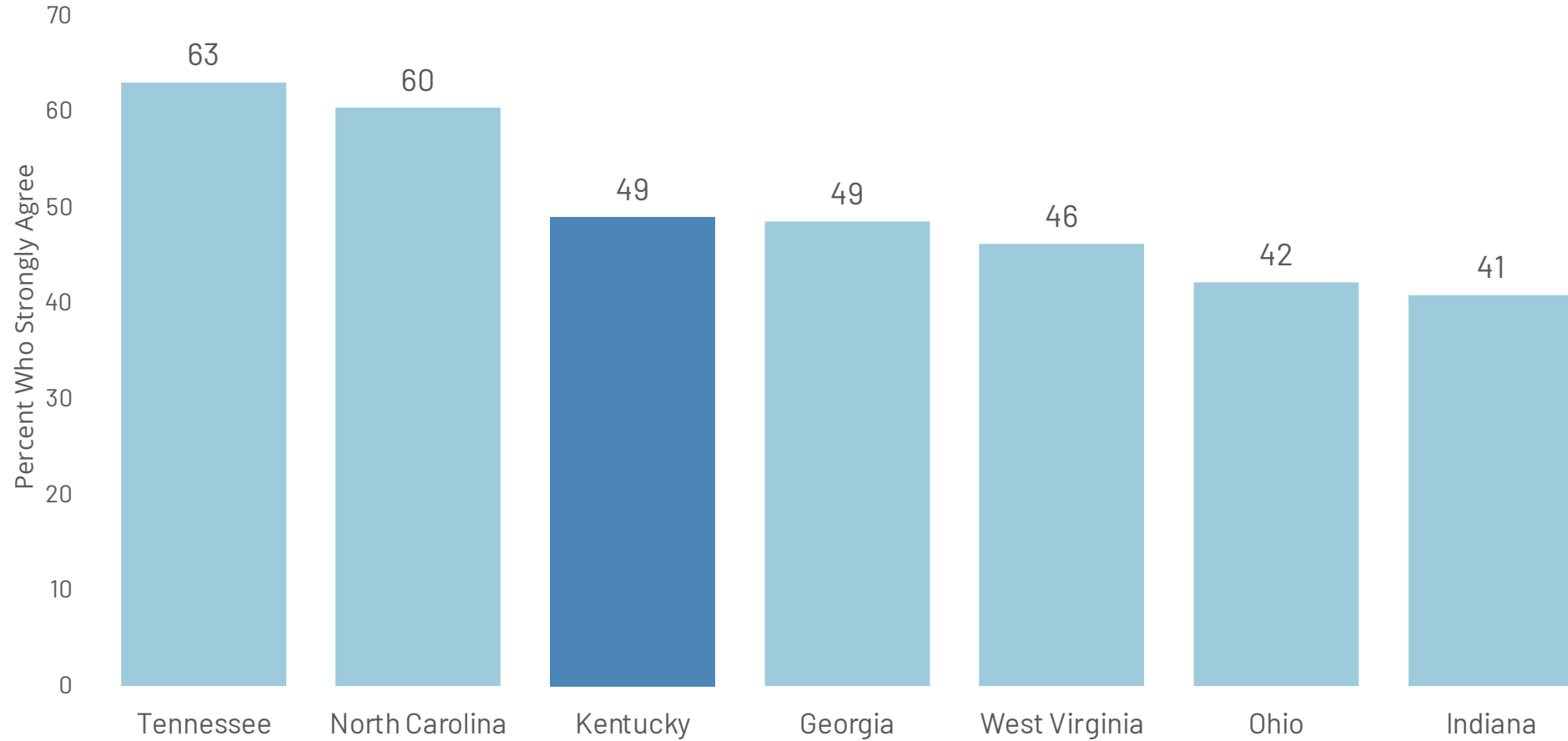
51



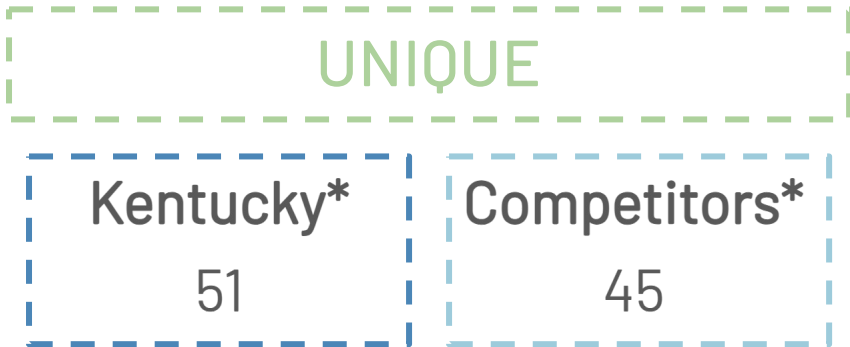
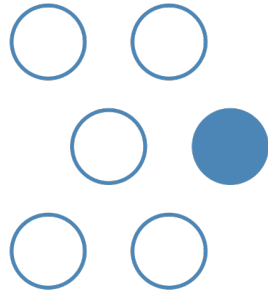
\*Percent who strongly agree

# IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

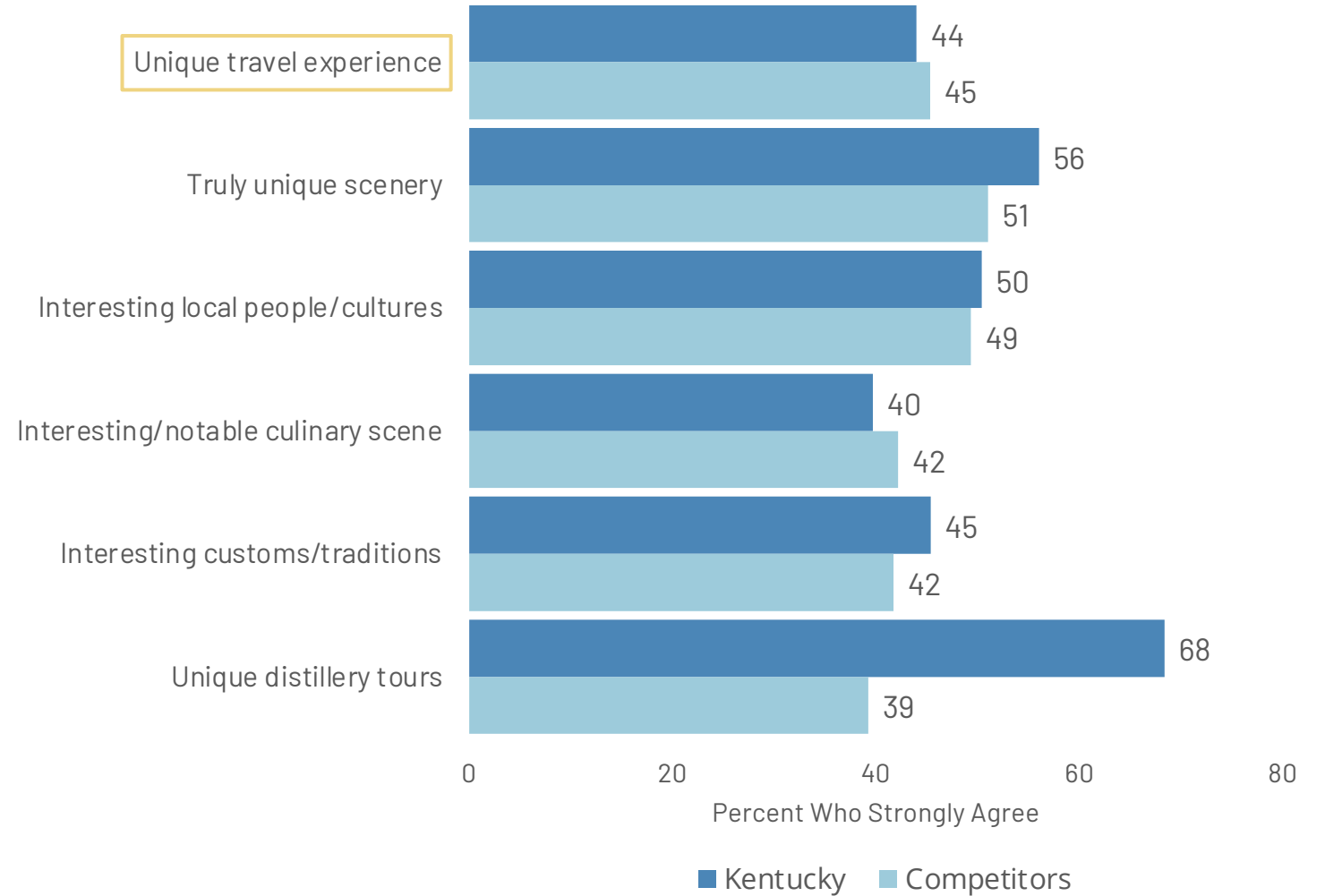
Base: Existing Markets



# IMAGE VS. COMPETITION - UNIQUE



Base: Existing Markets

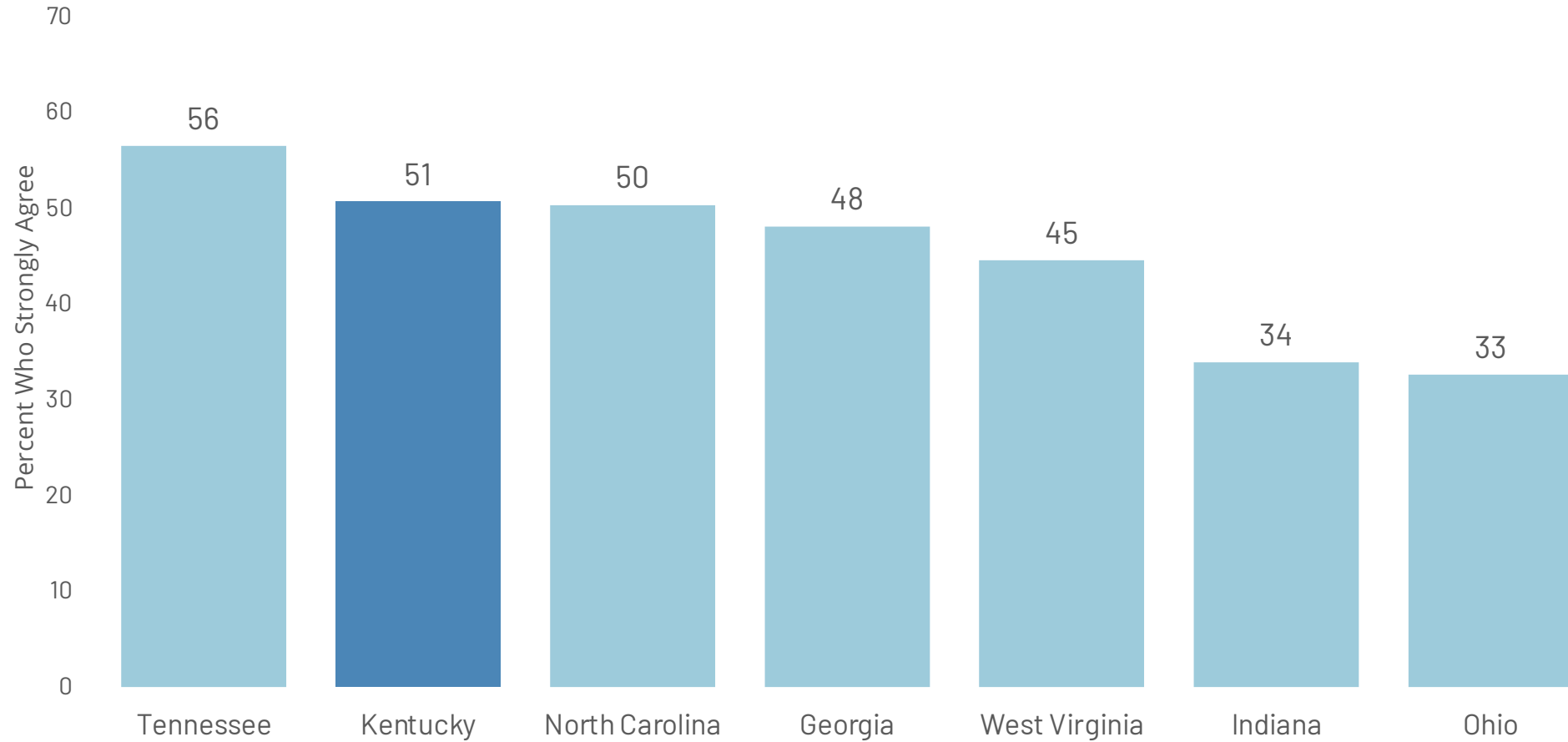


Hot Button

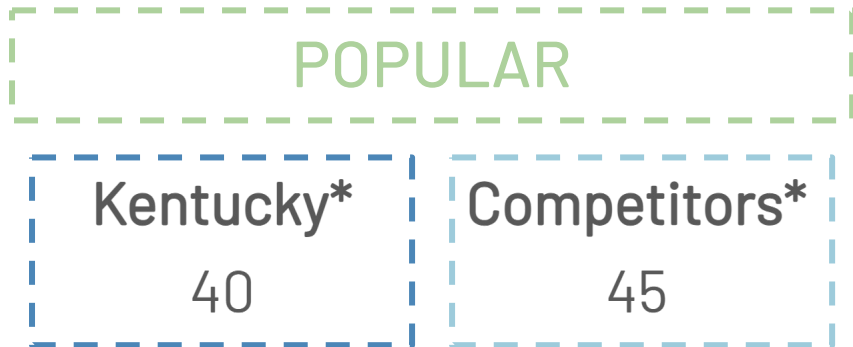
\*Percent who strongly agree

# IMAGE VS. COMPETITION - UNIQUE

Base: Existing Markets

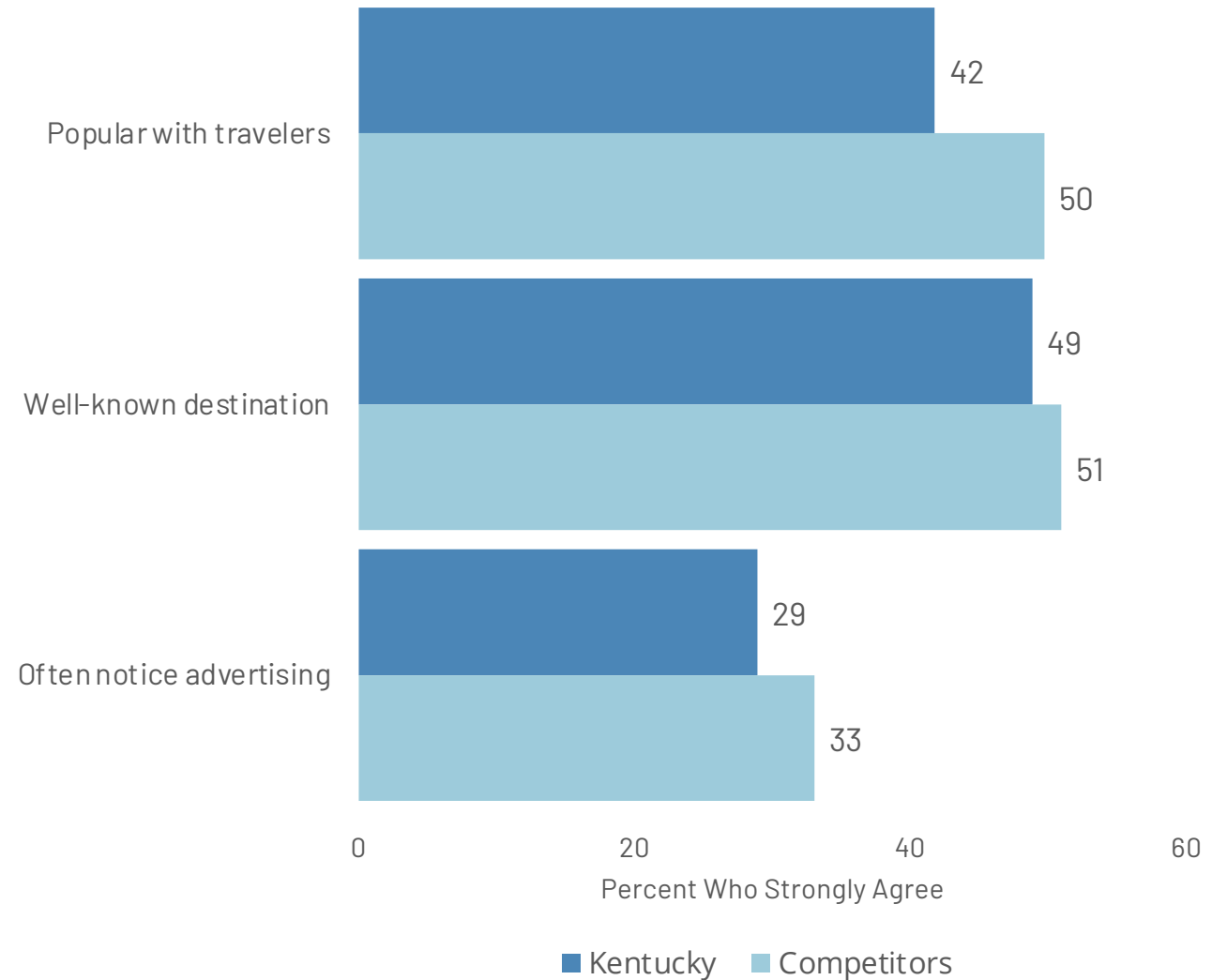


# IMAGE VS. COMPETITION - POPULAR



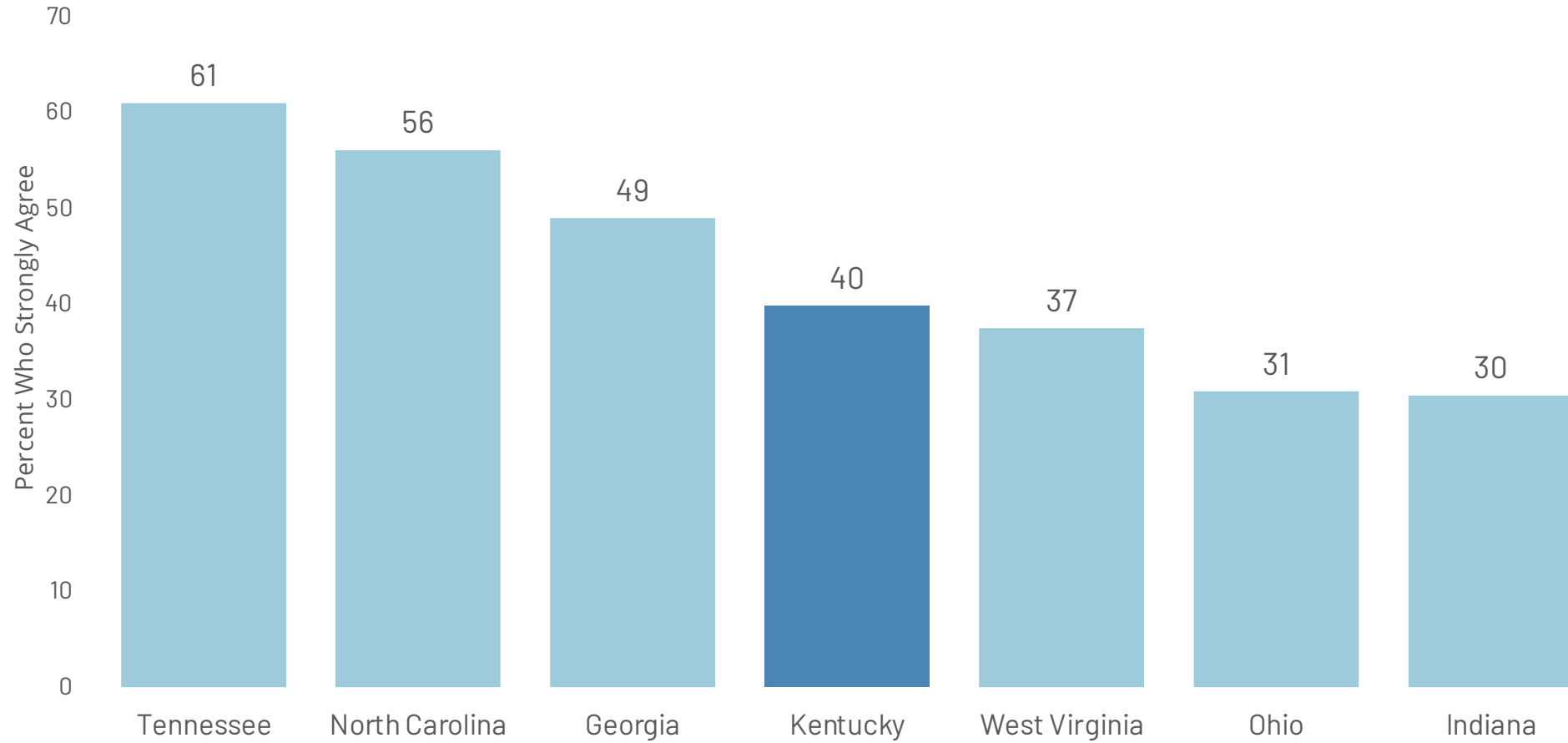
\*Percent who strongly agree

Base: Existing Markets



# IMAGE VS. COMPETITION - POPULAR

Base: Existing Markets



# IMAGE VS. COMPETITION - ENTERTAINMENT



## ENTERTAINMENT

Kentucky\*

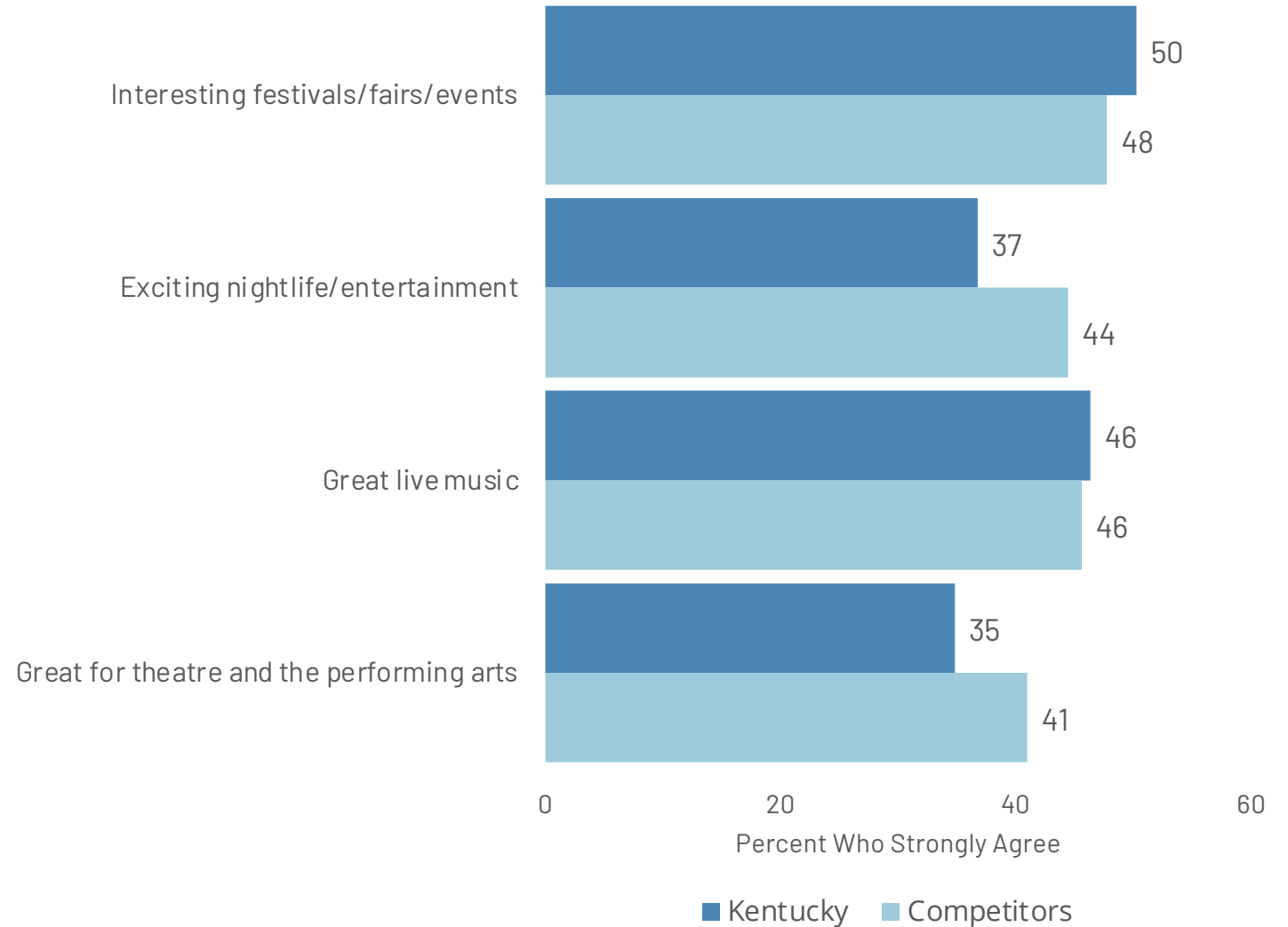
42

Competitors\*

45

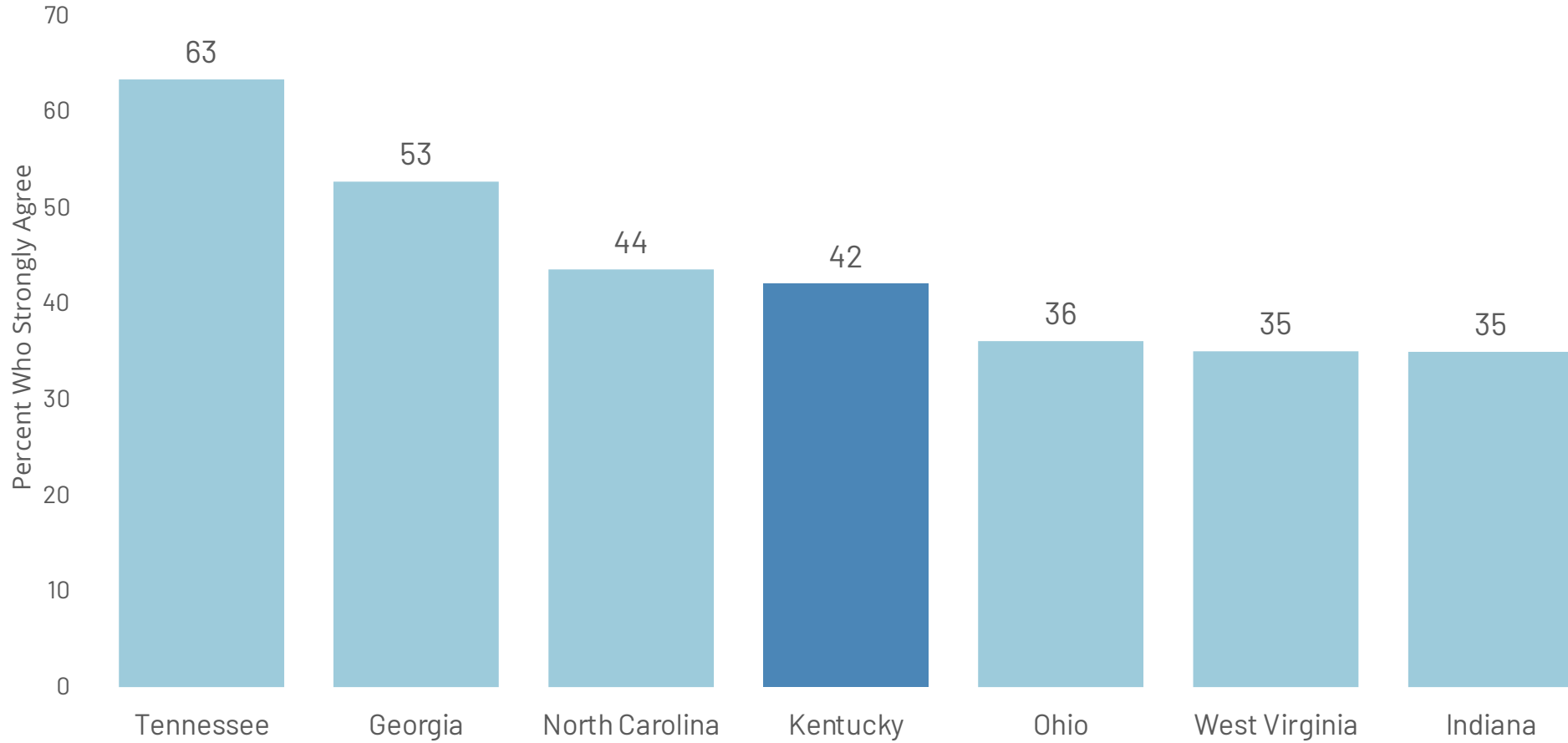
\*Percent who strongly agree

Base: Existing Markets



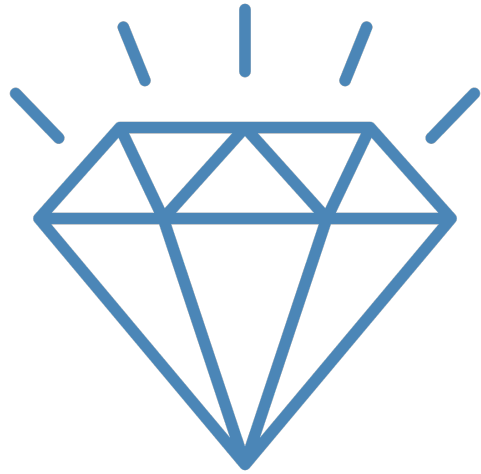
# IMAGE VS. COMPETITION - ENTERTAINMENT

Base: Existing Markets





# IMAGE VS. COMPETITION - LUXURIOUS



LUXURIOUS

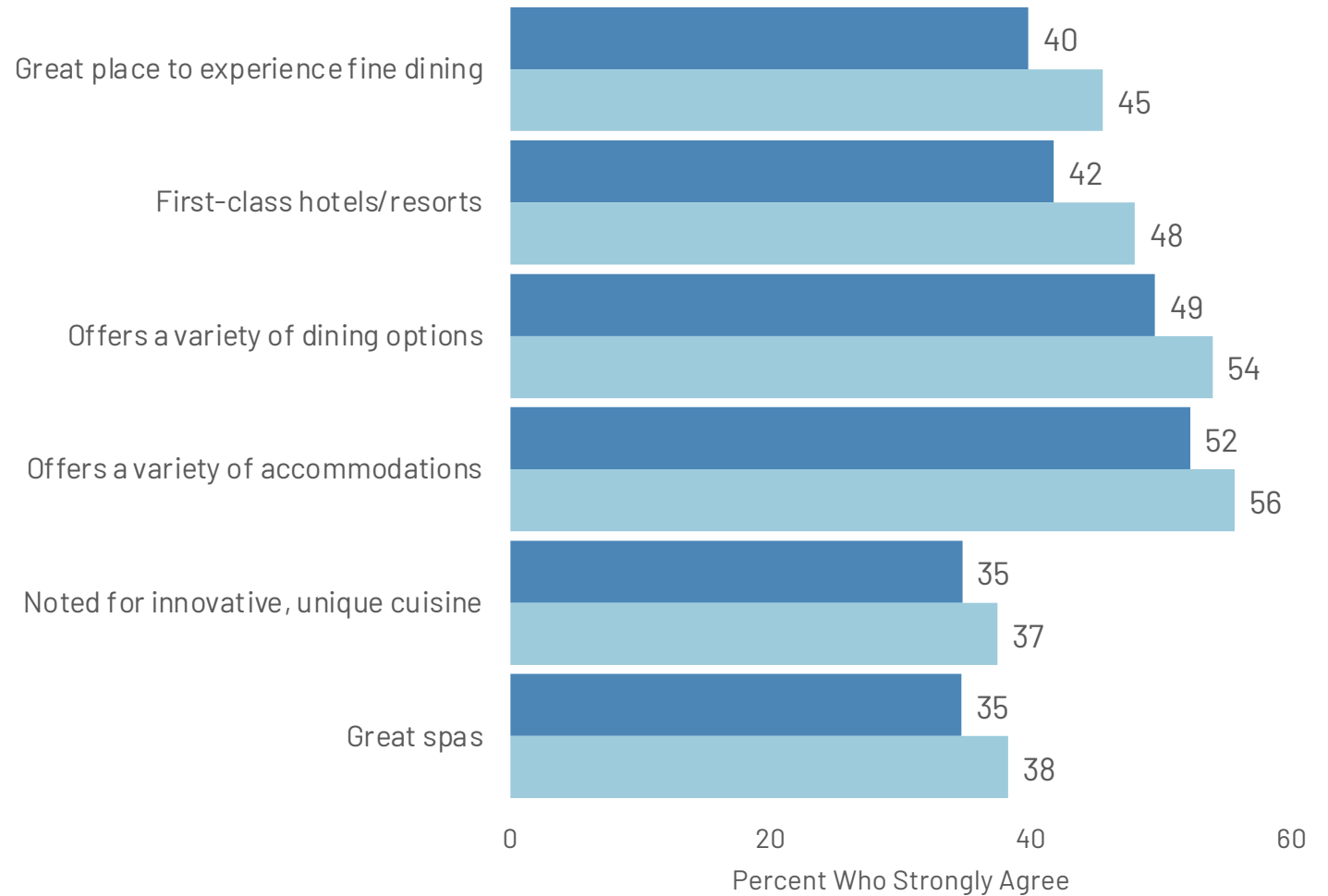
Kentucky\*

42

Competitors\*

46

Base: Existing Markets

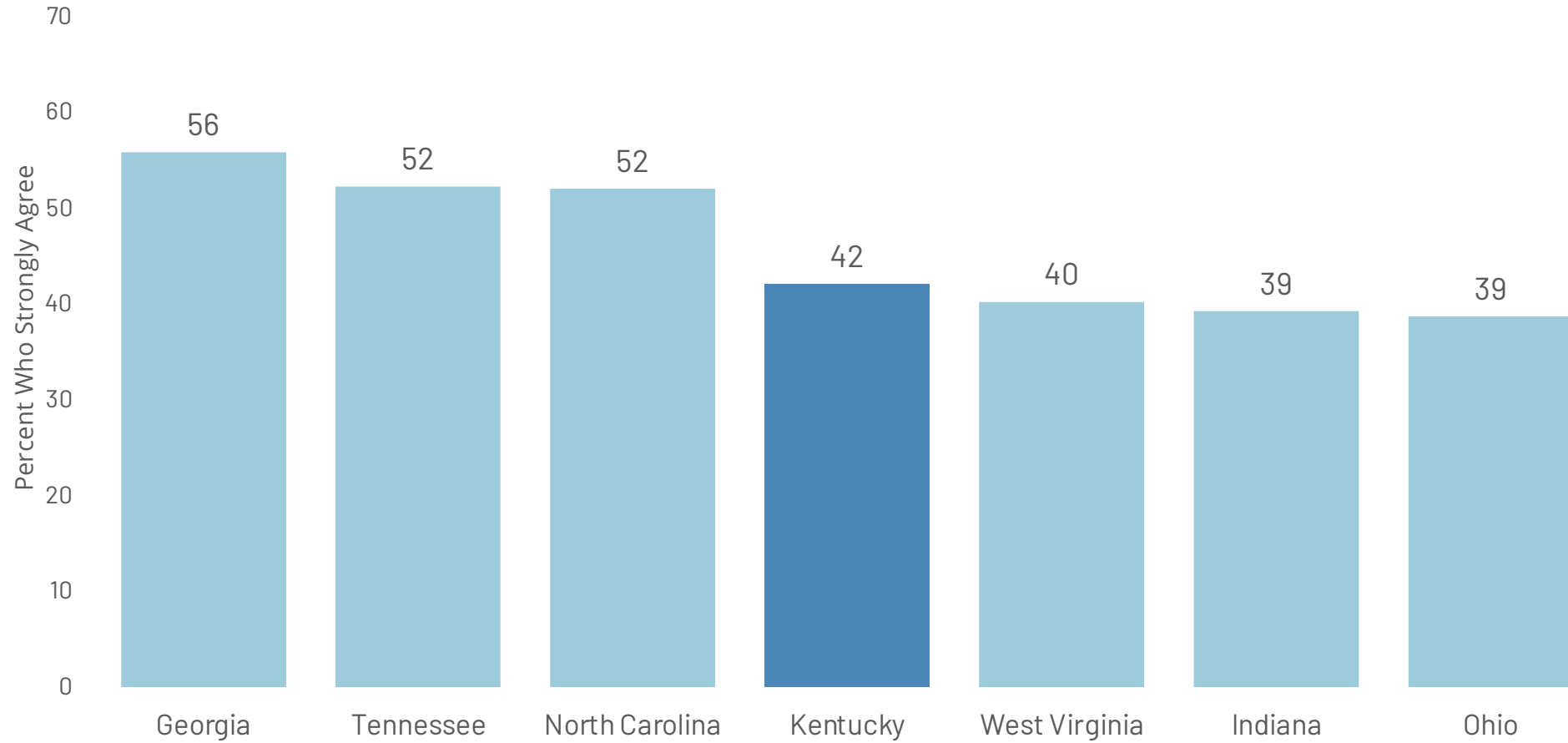


■ Kentucky ■ Competitors

\*Percent who strongly agree

# IMAGE VS. COMPETITION - LUXURIOUS

Base: Existing Markets



# IMAGE VS. COMPETITION - WORRY-FREE

Base: Existing Markets



WORRY-FREE

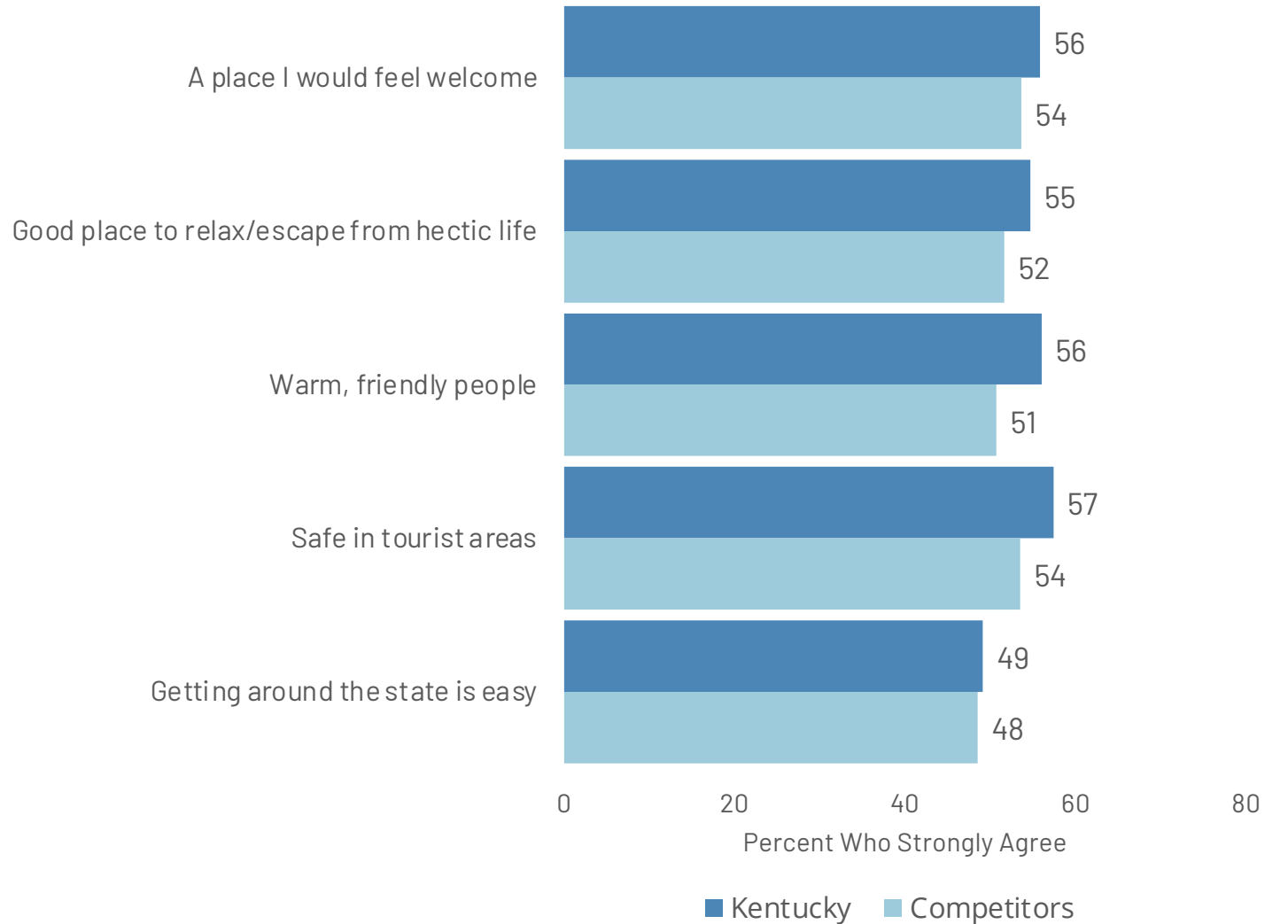
Kentucky\*

55

Competitors\*

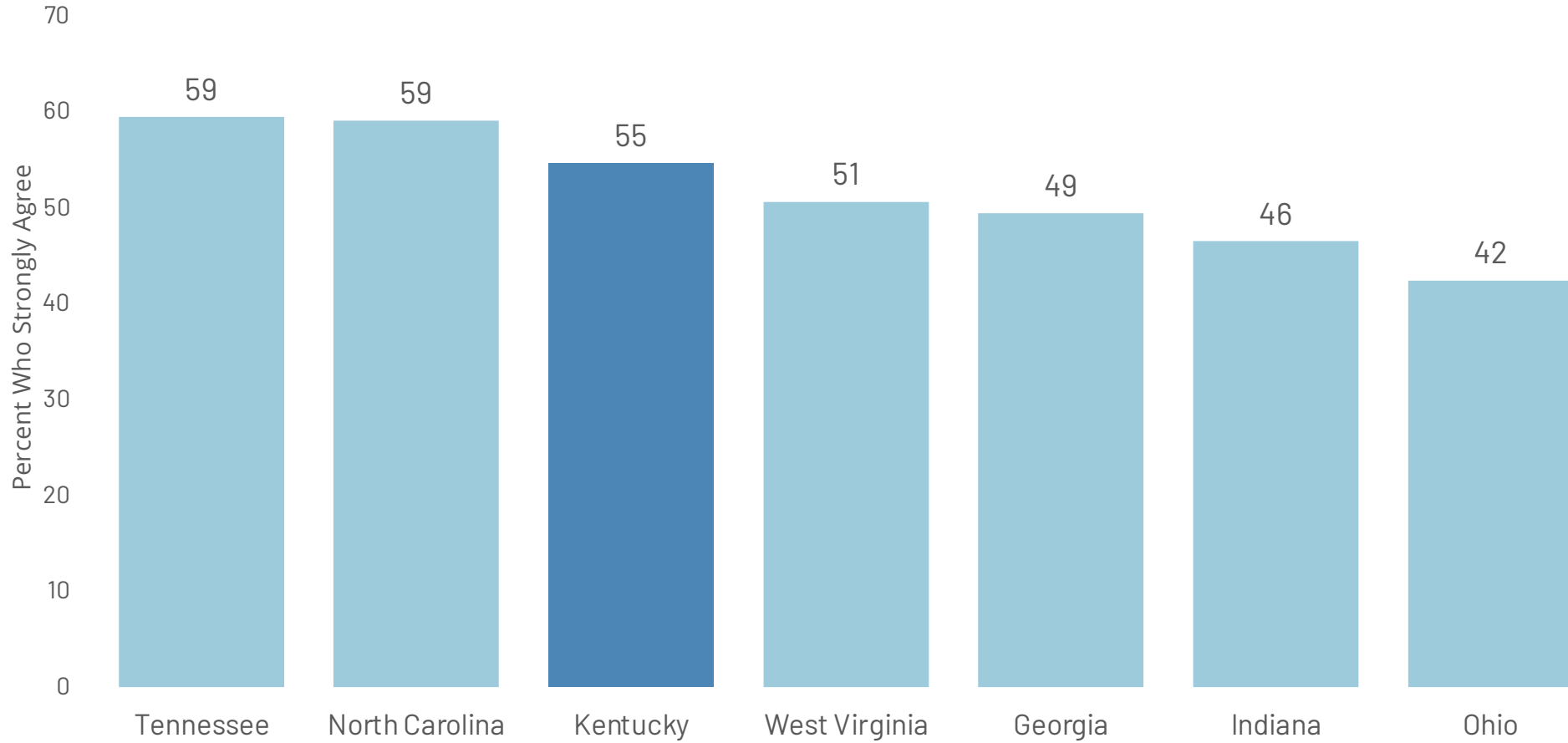
52

\*Percent who strongly agree



# IMAGE VS. COMPETITION - WORRY-FREE

Base: Existing Markets



# IMAGE VS. COMPETITION - SPORTS AND RECREATION



## SPORTS AND RECREATION

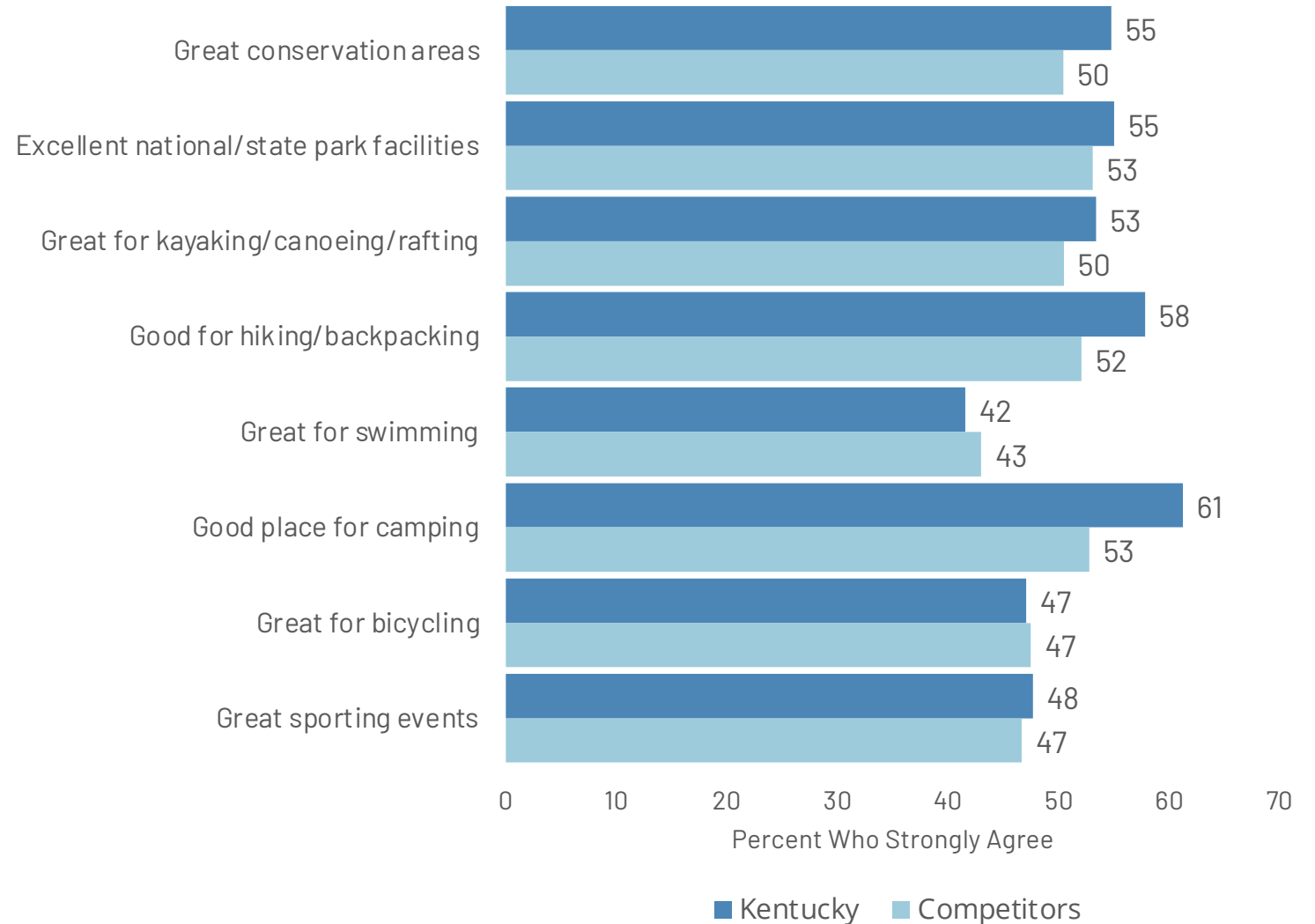
Kentucky\*

52

Competitors\*

49

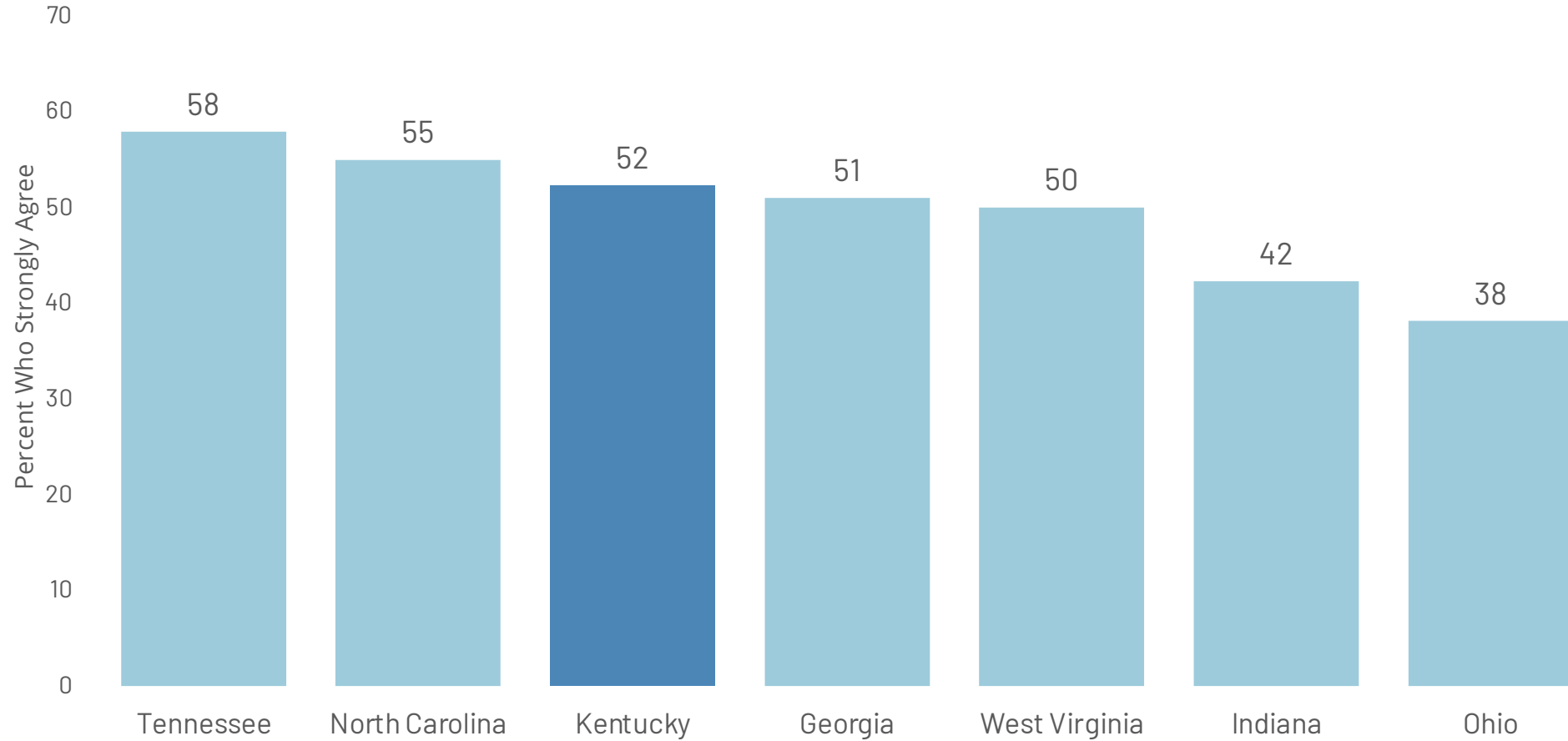
Base: Existing Markets



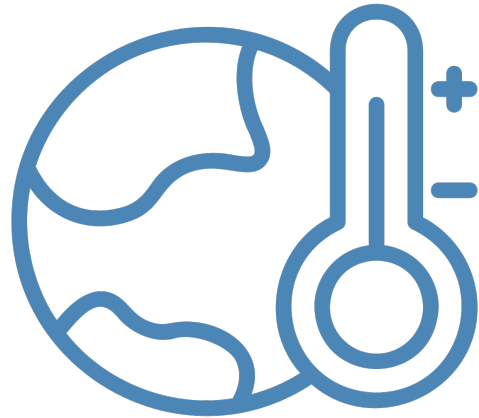
\*Percent who strongly agree

# IMAGE VS. COMPETITION - SPORTS AND RECREATION

Base: Existing Markets



# IMAGE VS. COMPETITION - CLIMATE



## CLIMATE

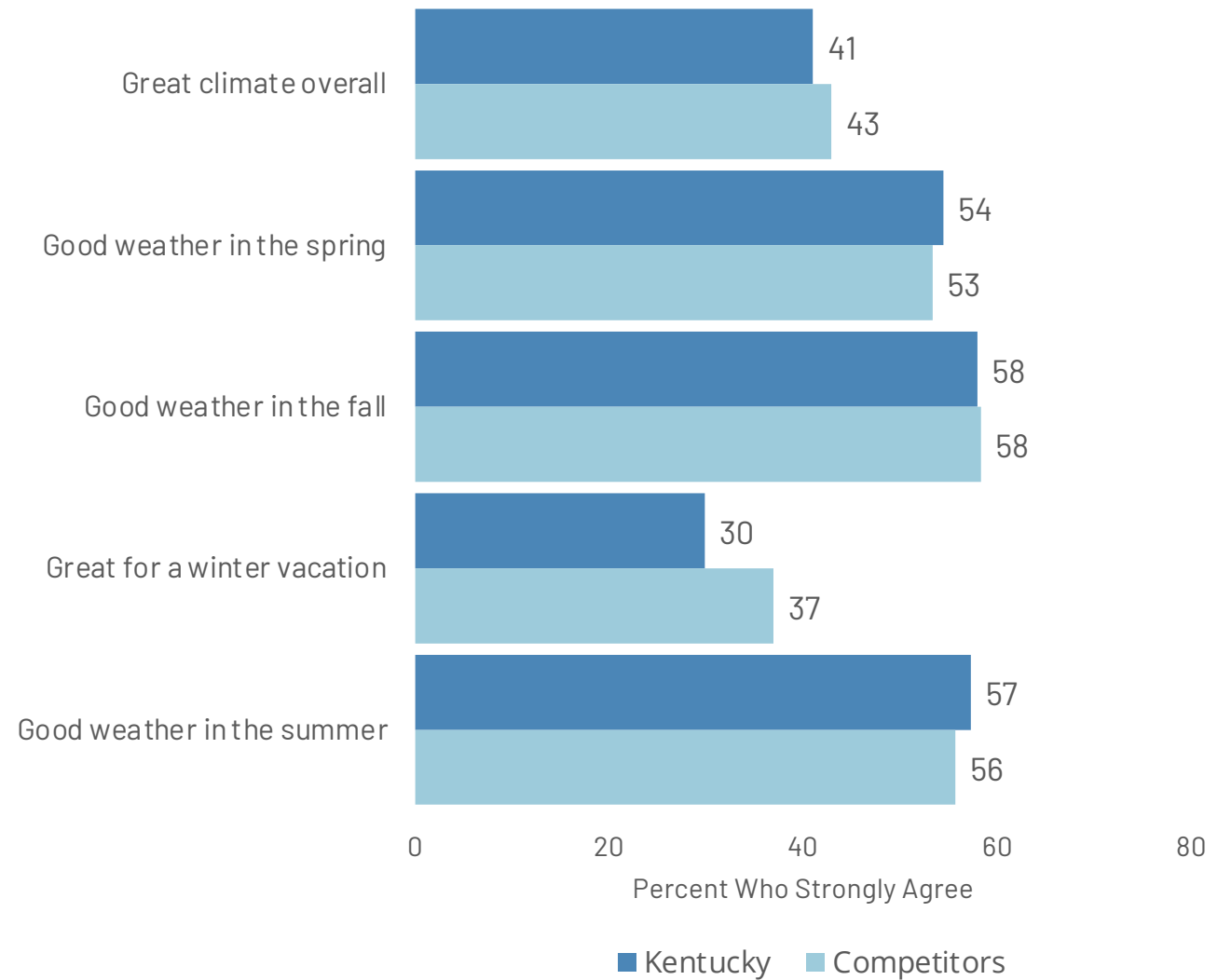
Kentucky\*

48

Competitors\*

49

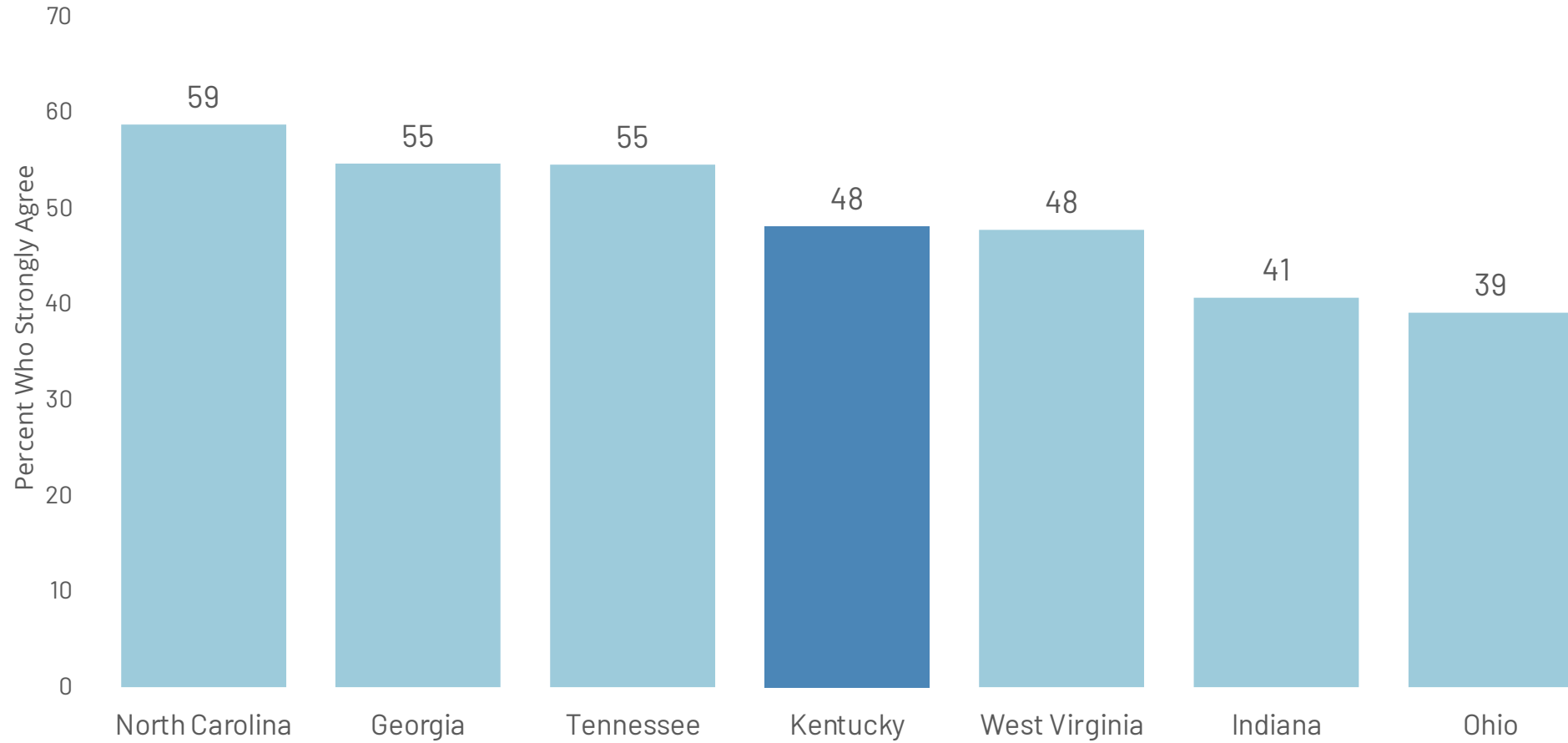
Base: Existing Markets



\*Percent who strongly agree

# IMAGE VS. COMPETITION - CLIMATE

Base: Existing Markets





# IMAGE VS. COMPETITION - AFFORDABLE



AFFORDABLE

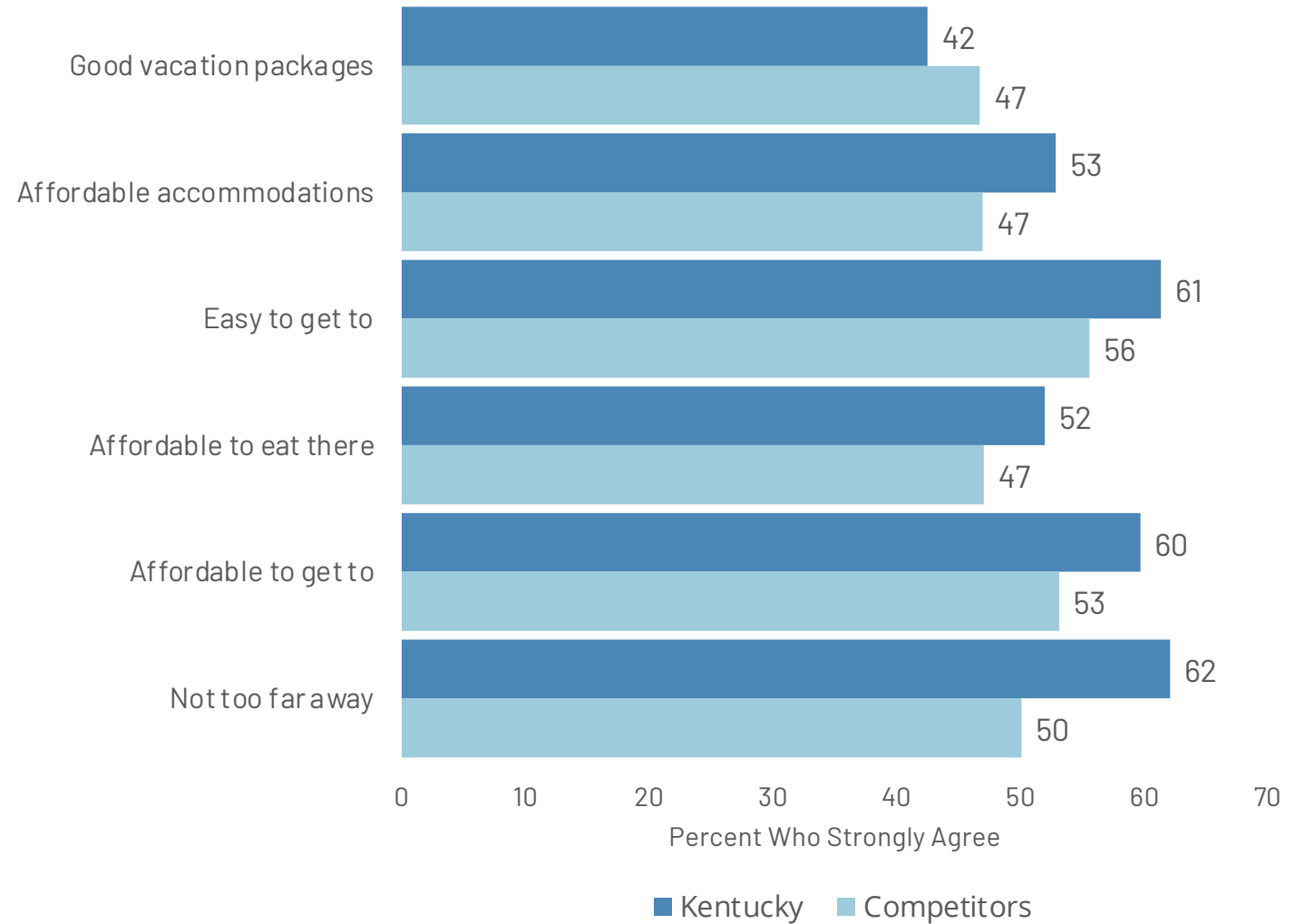
Kentucky\*

55

Competitors\*

50

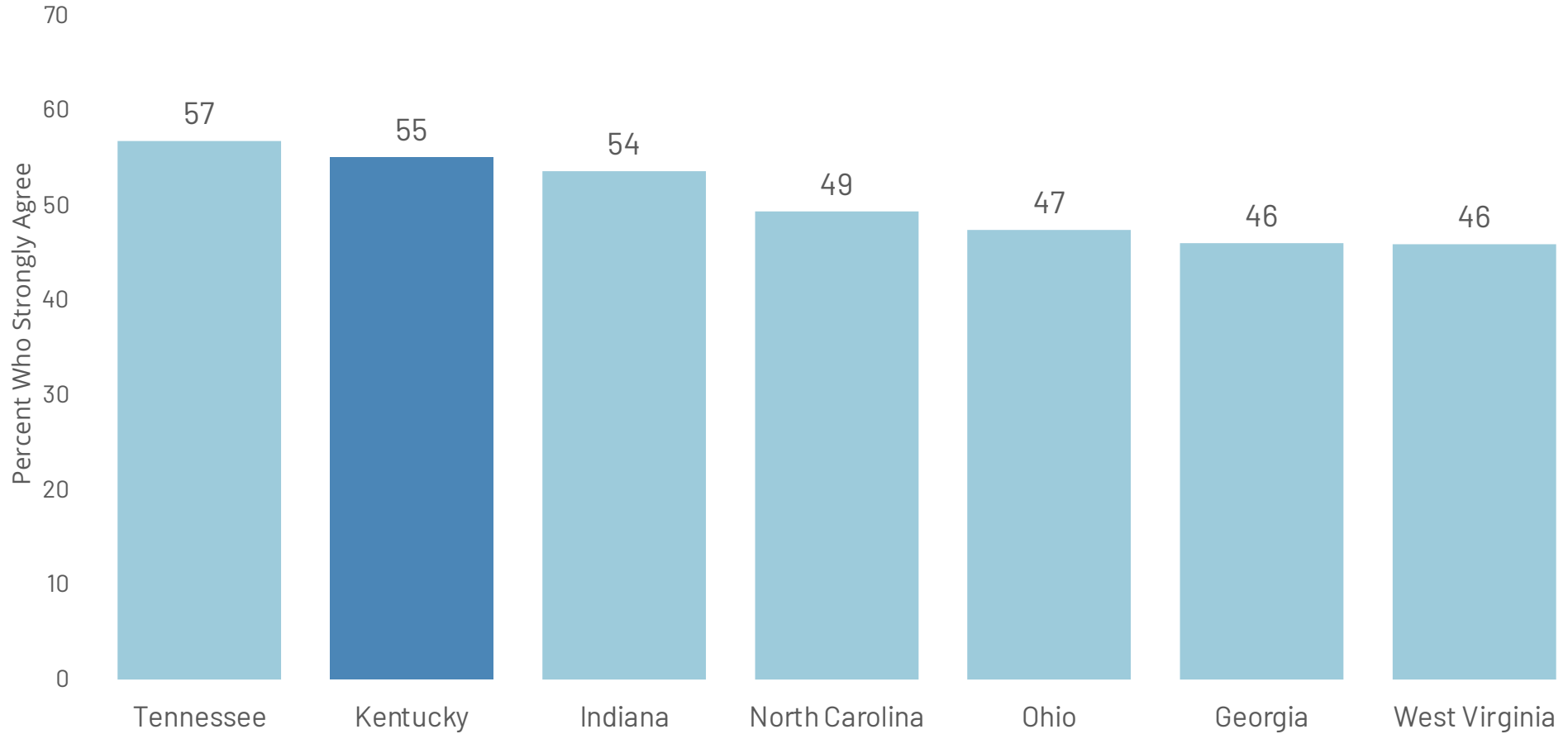
Base: Existing Markets



\*Percent who strongly agree

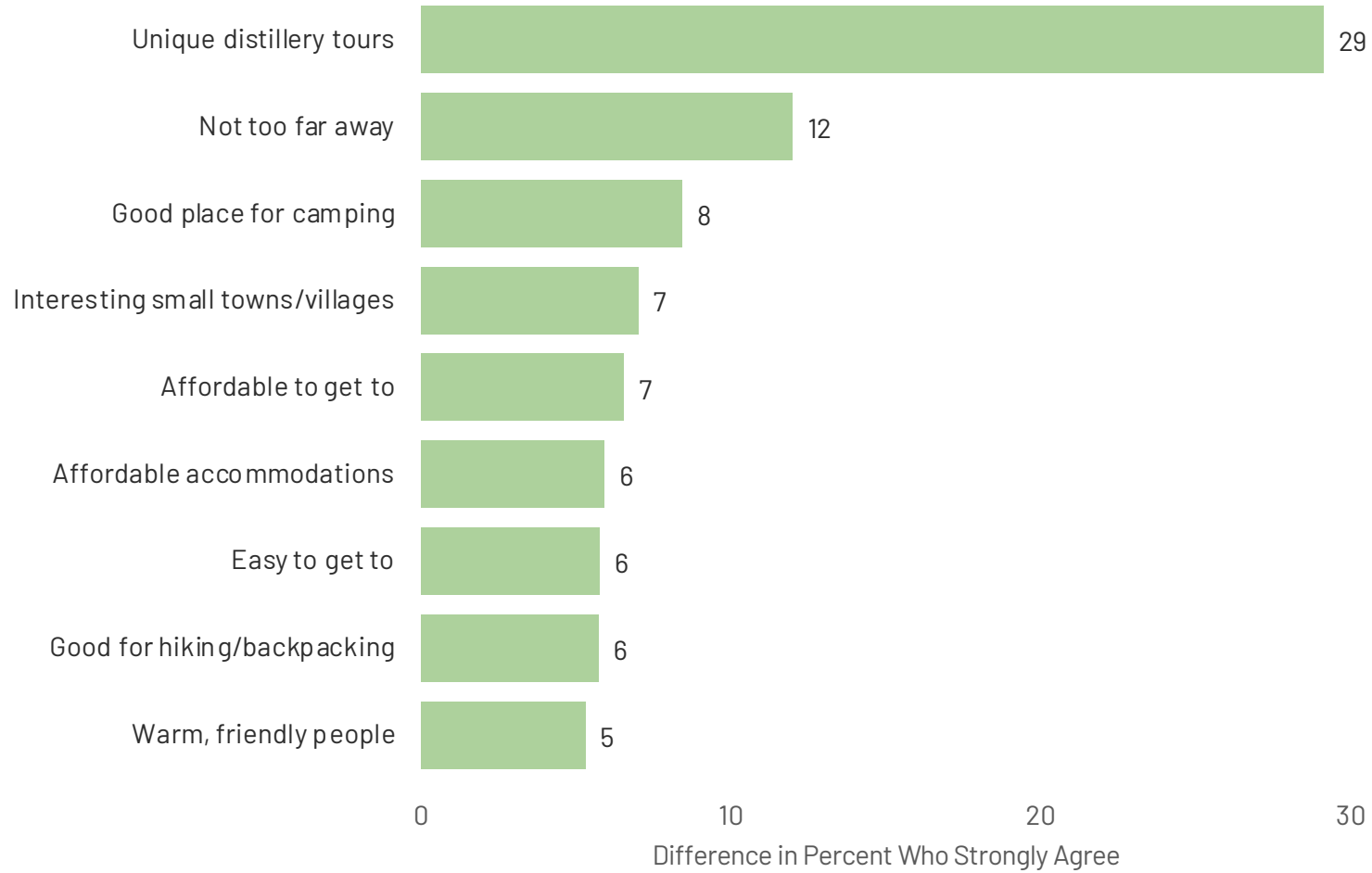
# IMAGE VS. COMPETITION - AFFORDABLE

Base: Existing Markets



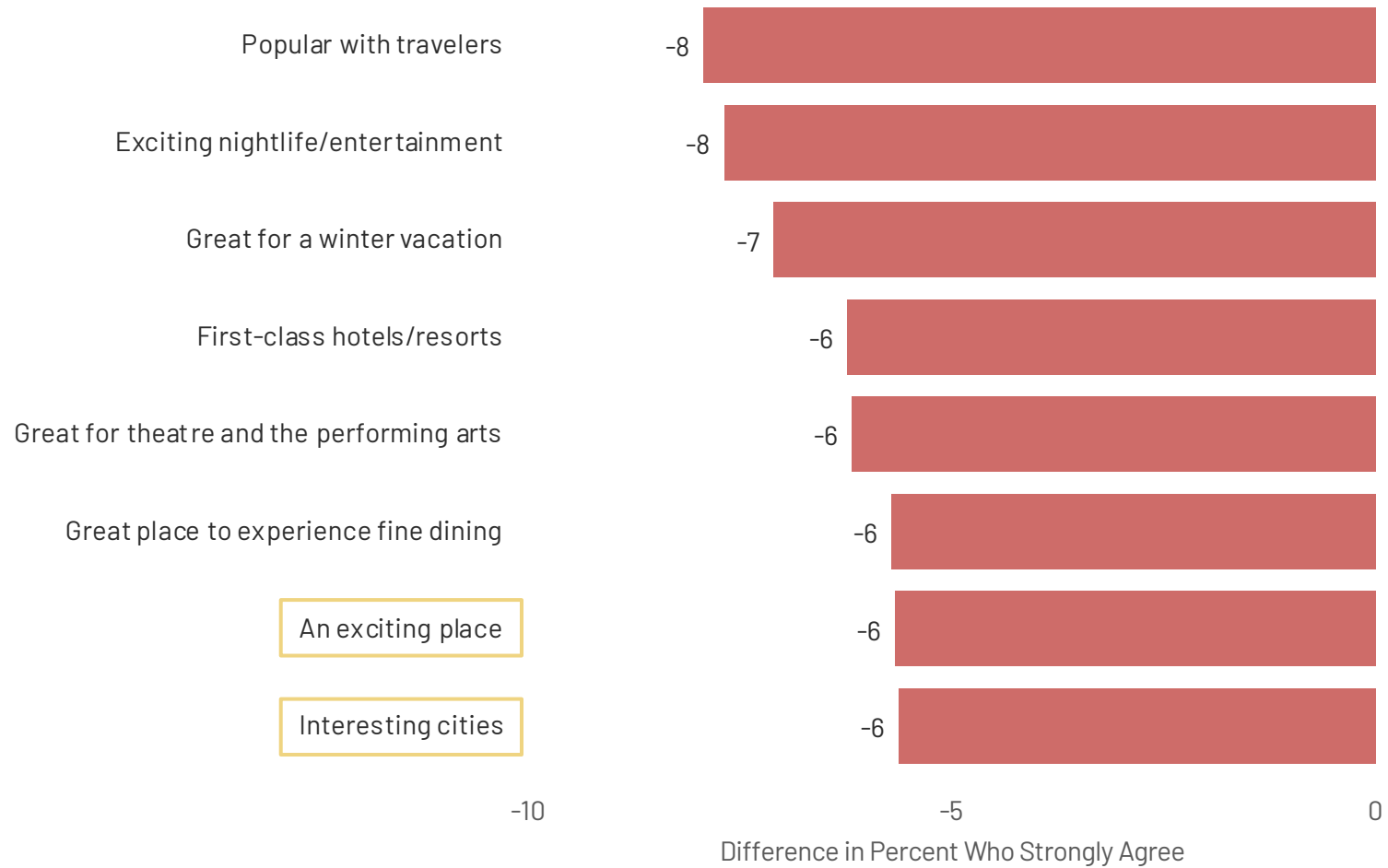
# IMAGE STRENGTHS VS. COMPETITION

Base: Existing Markets



# IMAGE WEAKNESSES VS. COMPETITION

Base: Existing Markets



Hot Button



"HALO EFFECT" ON  
ECONOMIC DEVELOPMENT



## THE "HALO EFFECT"

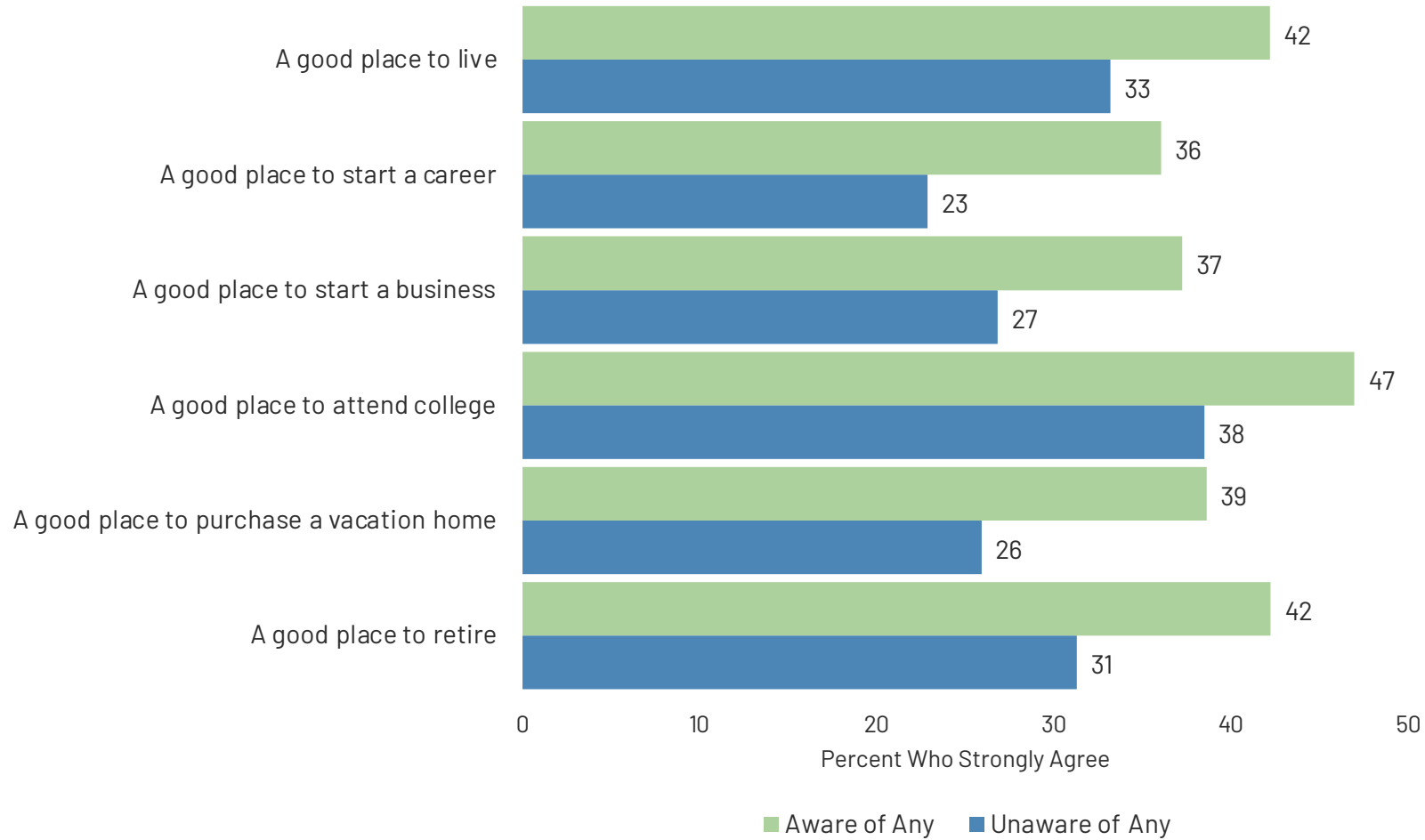
Research has long demonstrated that tourism advertising and the visitation it inspires have a **positive impact on consumers' image** of destinations as a place for leisure travel and recreation.

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?



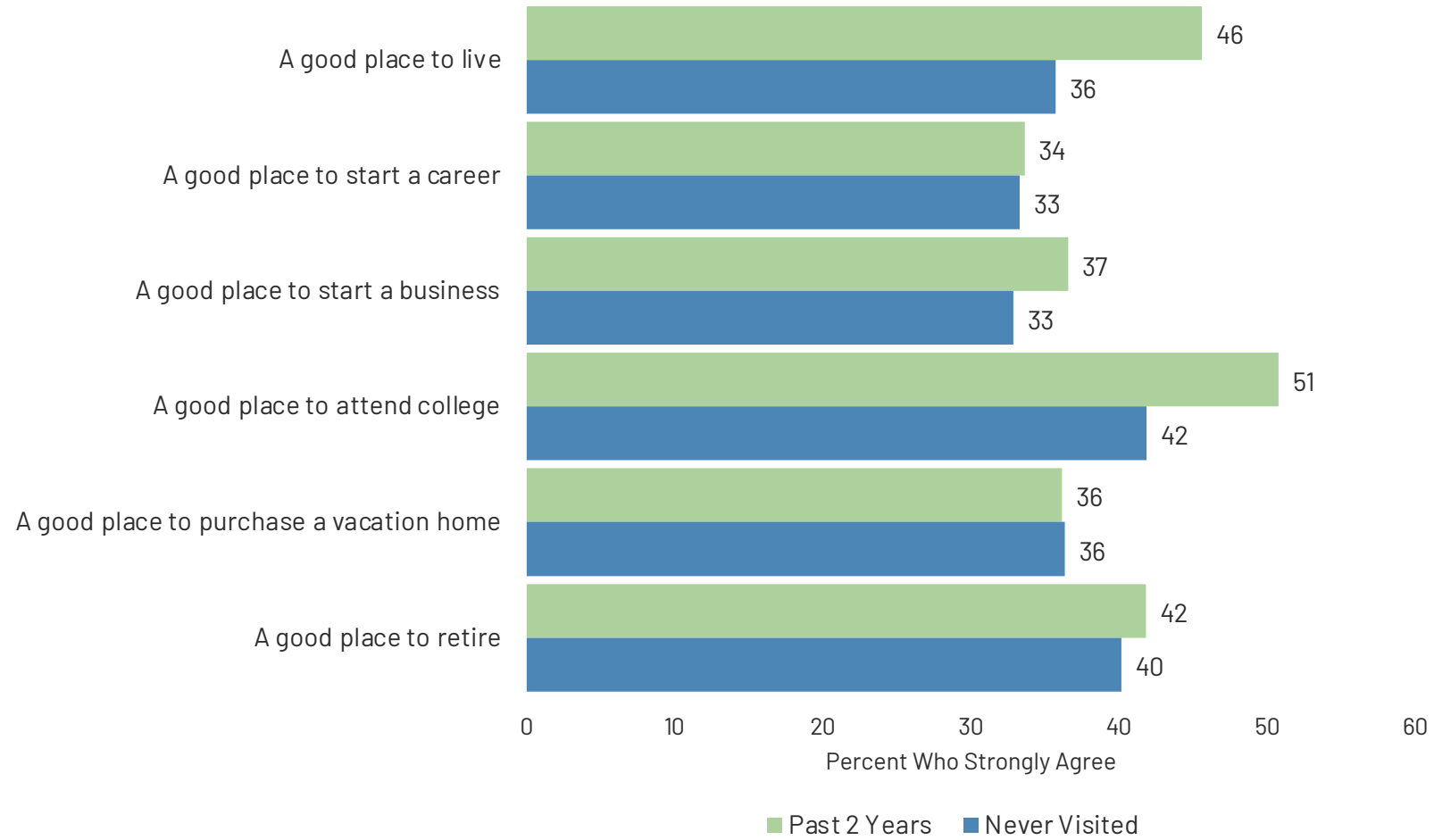
# IMPACT OF *TOURISM AD AWARENESS* ON ECONOMIC DEVELOPMENT IMAGE

Base: Out-of-State Existing Markets



# IMPACT OF *VISITATION* ON ECONOMIC DEVELOPMENT IMAGE

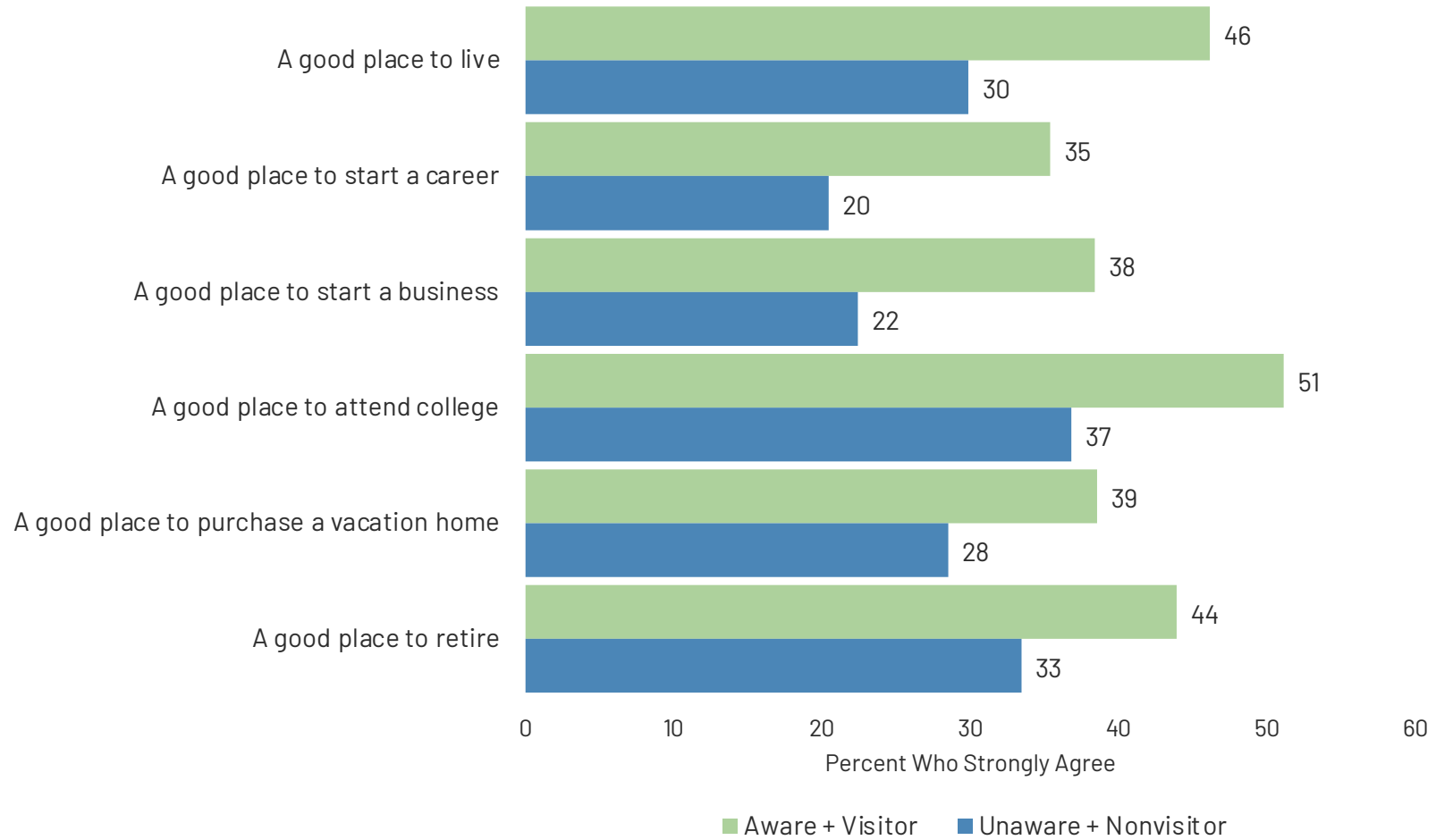
Base: Out-of-State Existing Markets





# IMPACT OF *AD AWARENESS + VISITATION* ON ECONOMIC DEVELOPMENT IMAGE

Base: Out-of-State Existing Markets





APPENDIX: IMAGE STRENGTHS AND  
WEAKNESSES VS. INDIVIDUAL COMPETITION



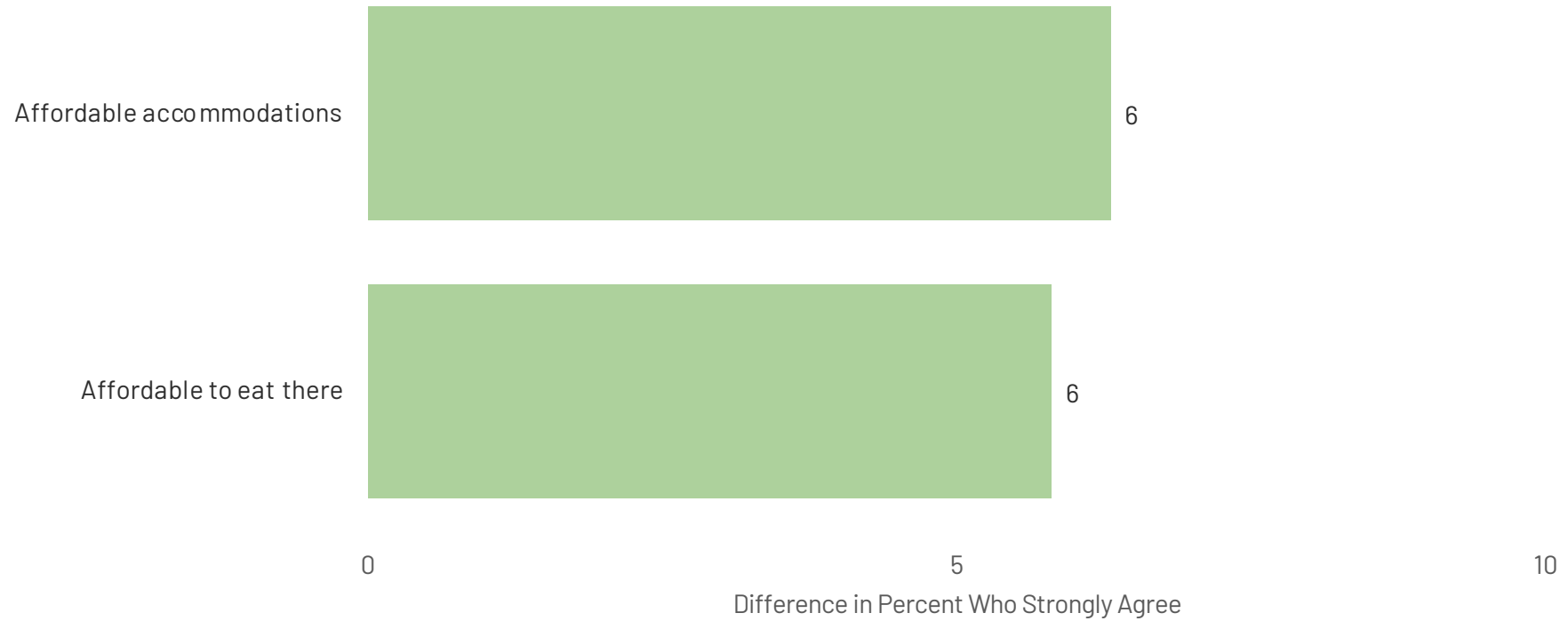


# KENTUCKY VS. TENNESSEE: IMAGE STRENGTHS AND WEAKNESSES



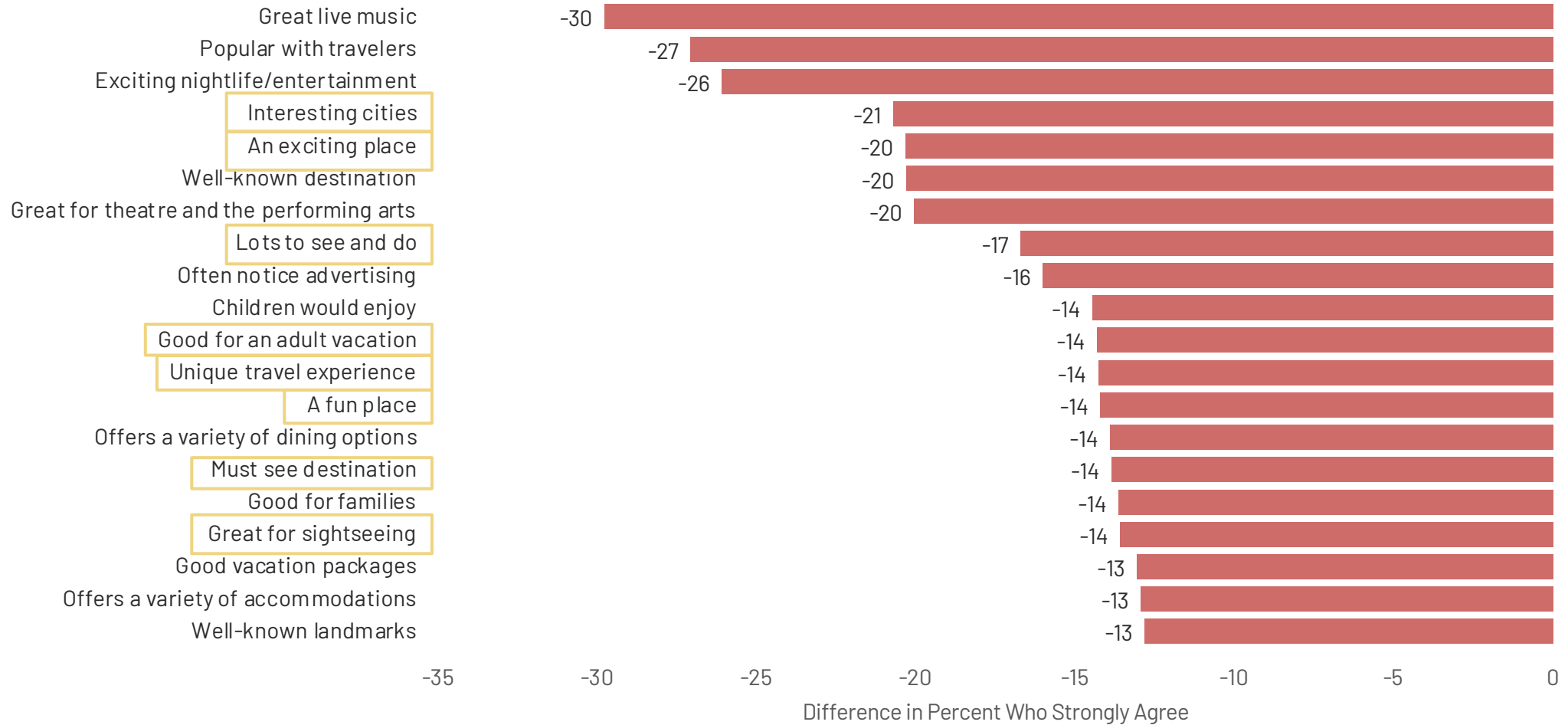
# IMAGE STRENGTHS VS. TENNESSEE

Base: Existing Markets



# IMAGE WEAKNESSES VS. TENNESSEE

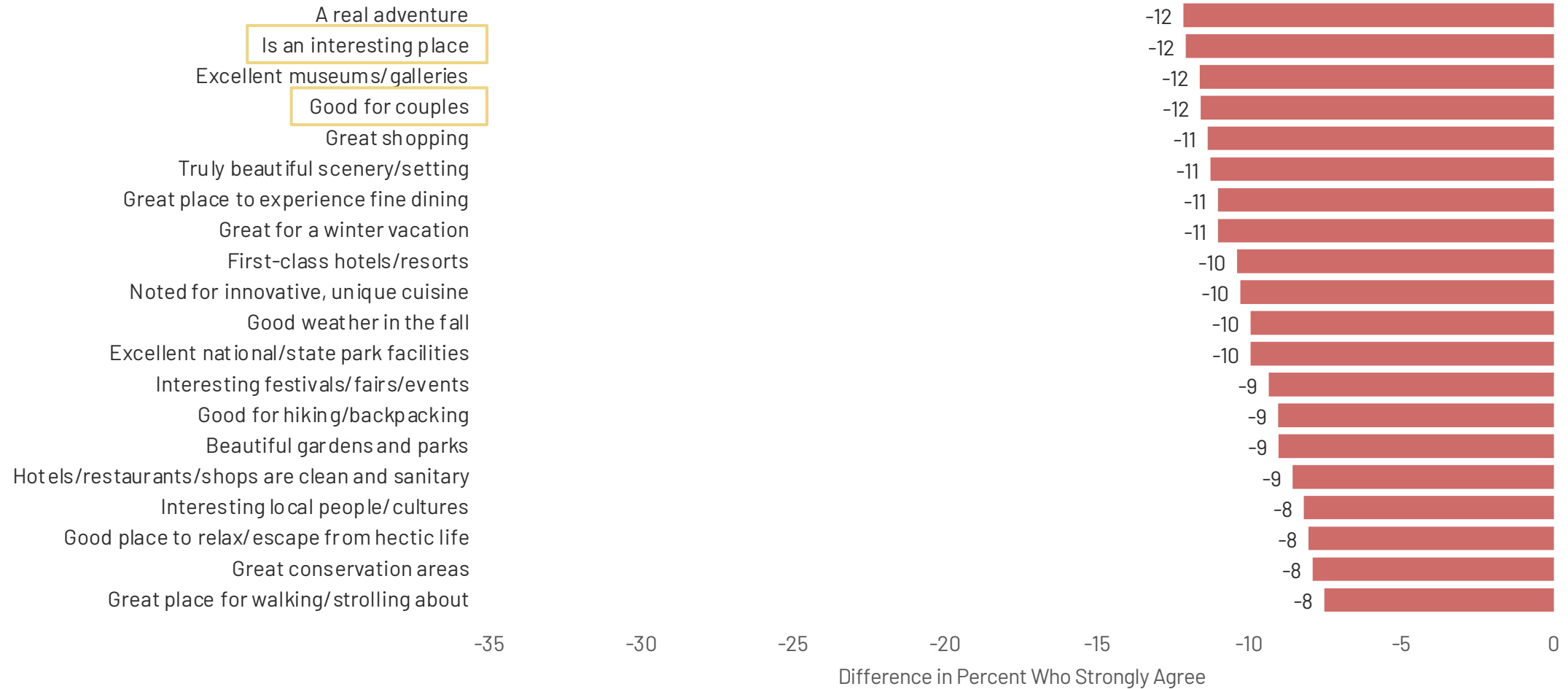
Base: Existing Markets



Hot Button

# IMAGE WEAKNESSES VS. TENNESSEE (CONT'D)

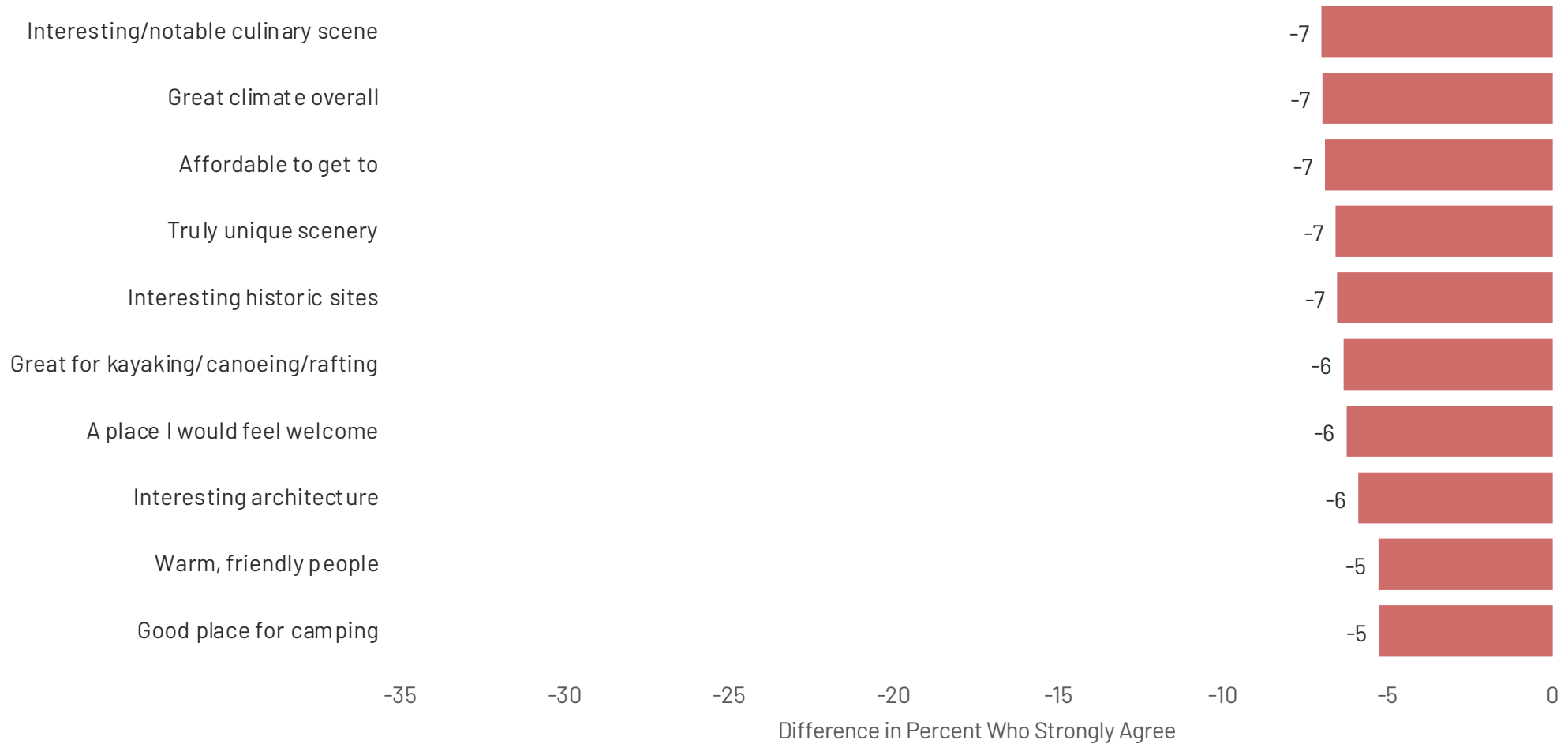
Base: Existing Markets



Hot Button

# IMAGE WEAKNESSES VS. TENNESSEE (CONT'D)

Base: Existing Markets





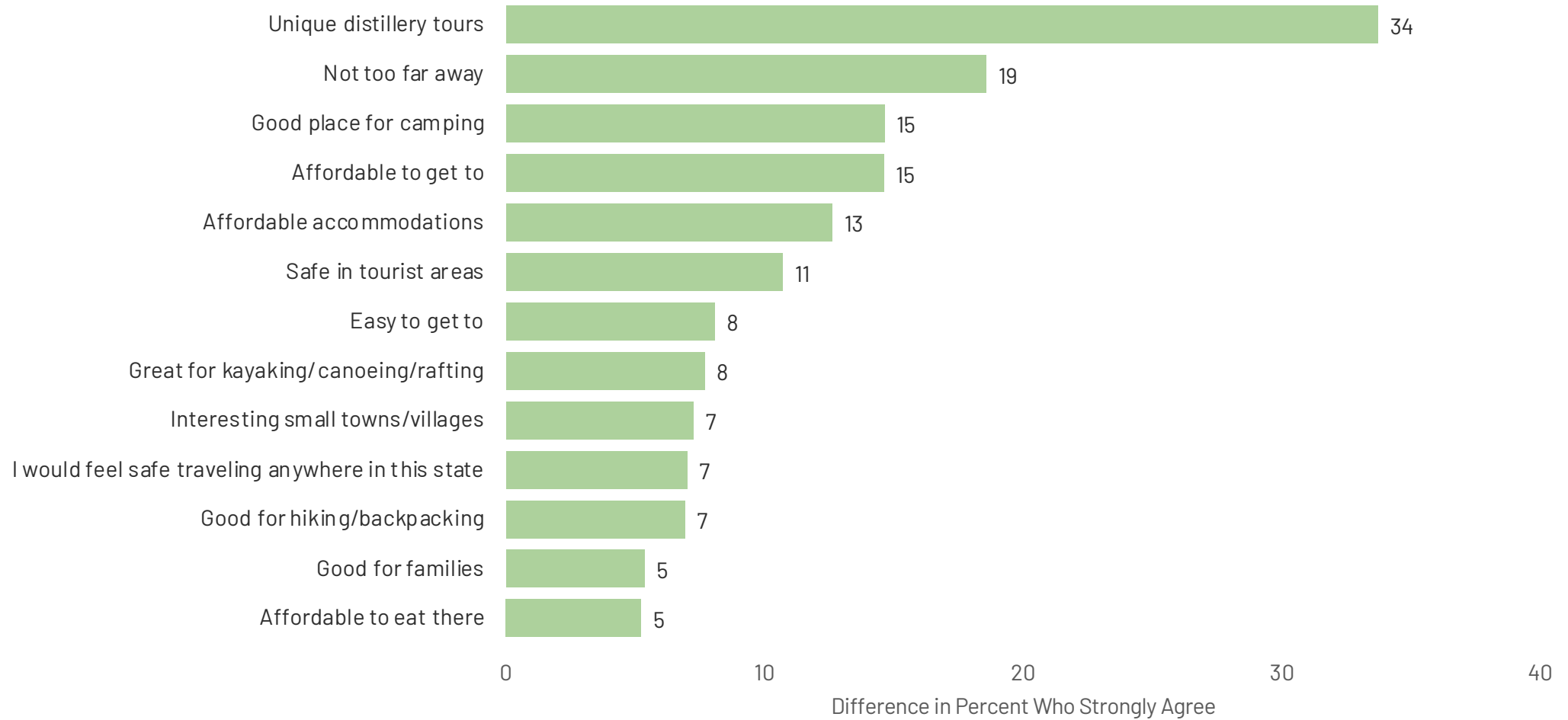
# KENTUCKY VS. GEORGIA: IMAGE STRENGTHS AND WEAKNESSES





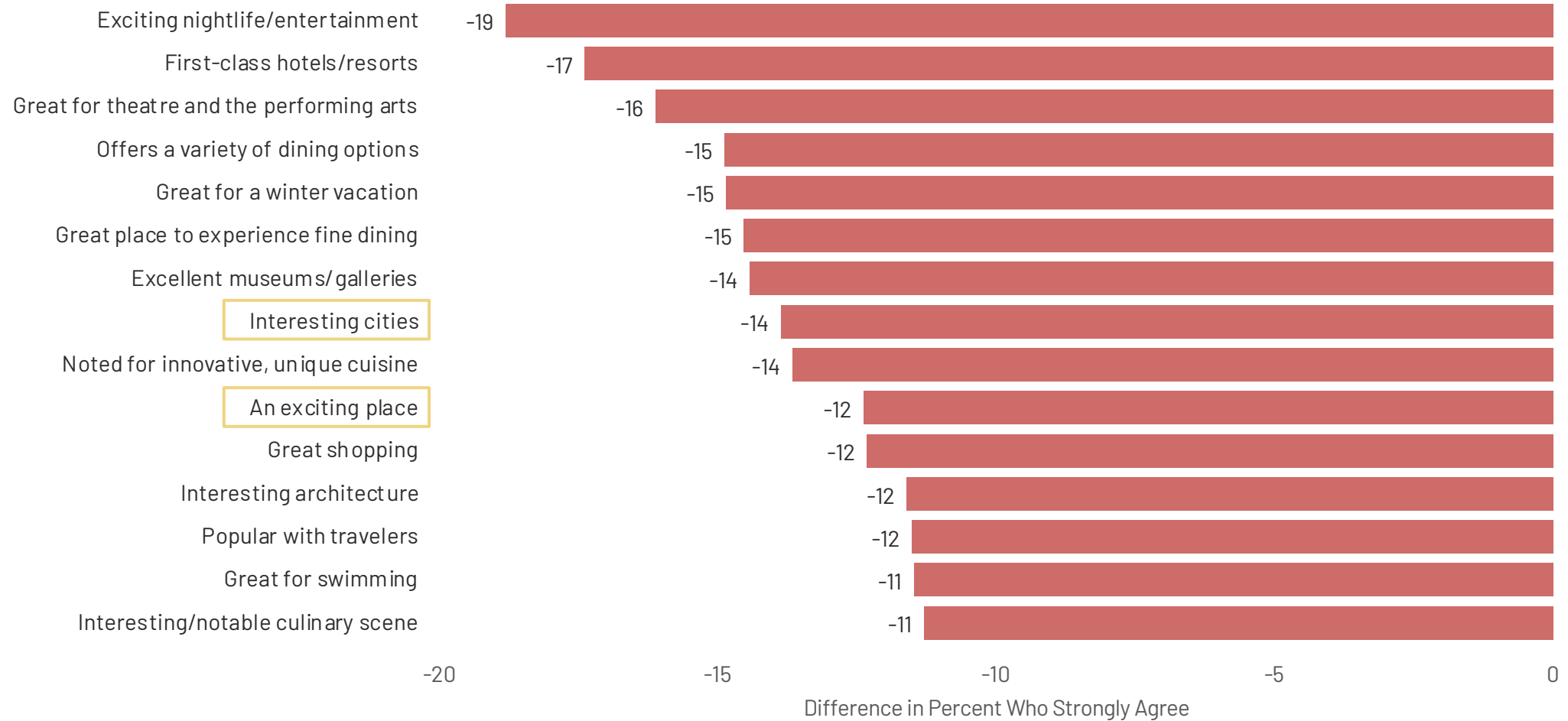
# IMAGE STRENGTHS VS. GEORGIA

Base: Existing Markets



# IMAGE WEAKNESSES VS. GEORGIA

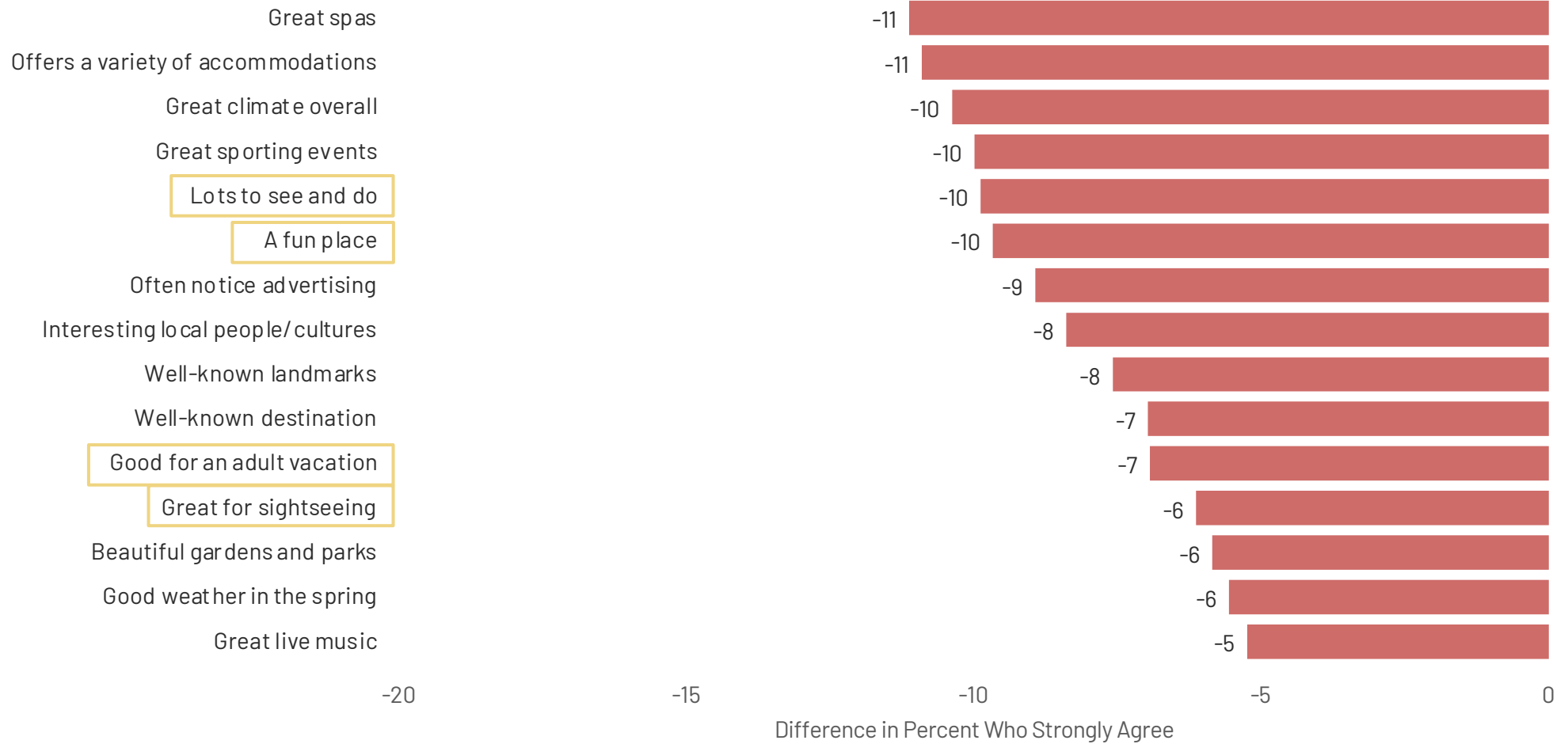
Base: Existing Markets



Hot Button

# IMAGE WEAKNESSES VS. GEORGIA (CONT'D)

Base: Existing Markets



Hot Button

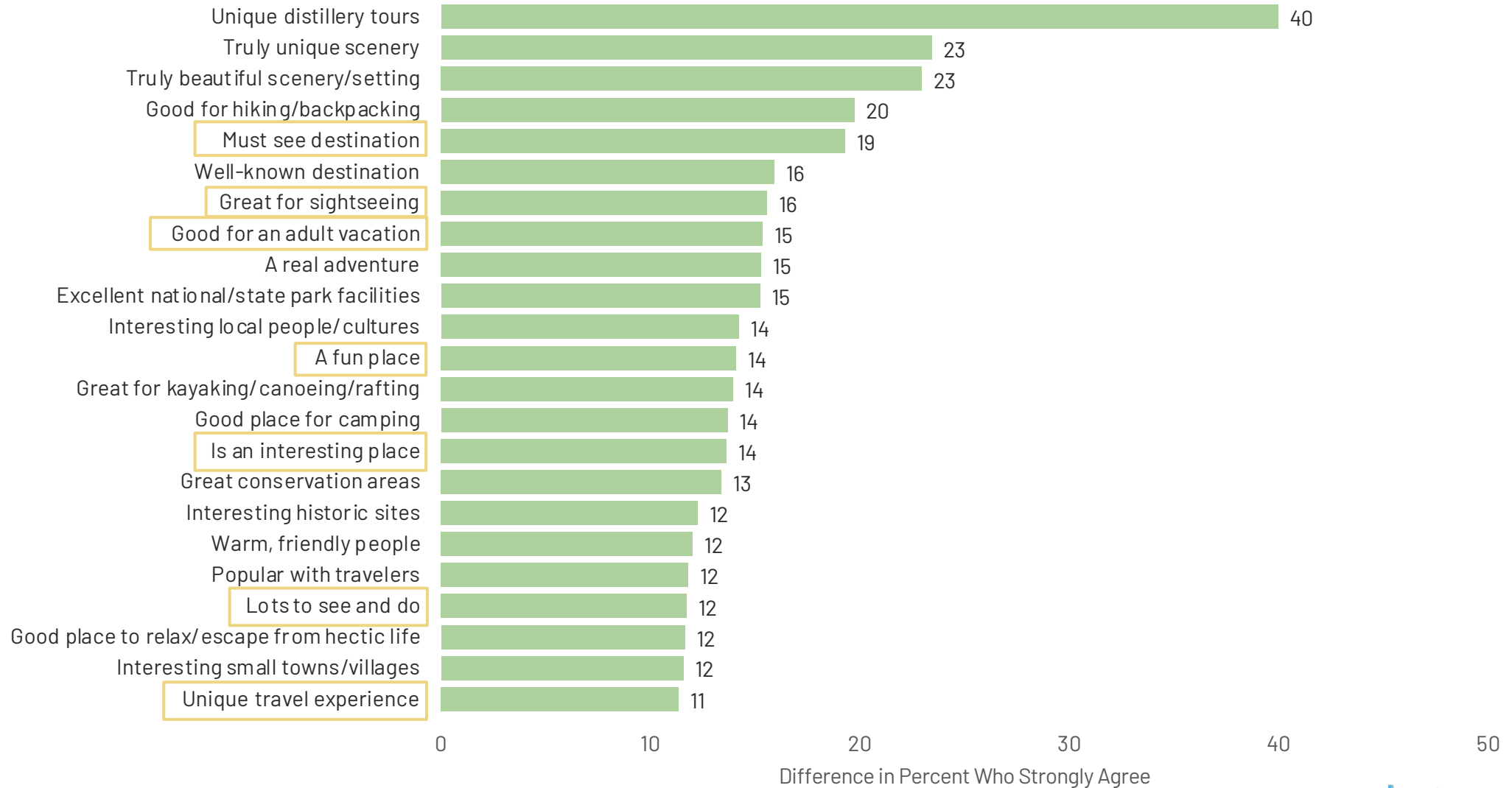


# KENTUCKY VS. INDIANA: IMAGE STRENGTHS AND WEAKNESSES



# IMAGE STRENGTHS VS. INDIANA

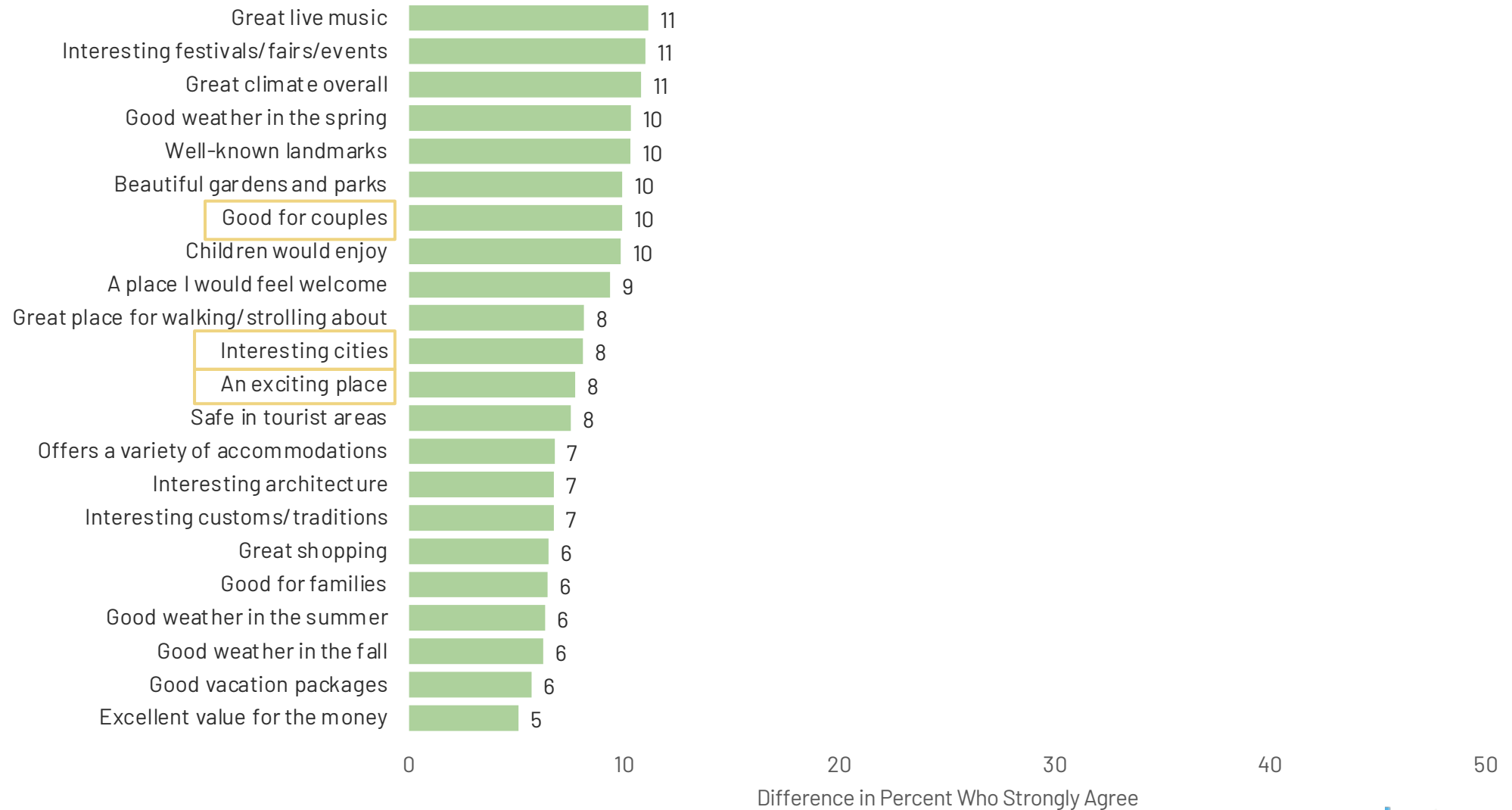
Base: Existing Markets



Hot Button

# IMAGE STRENGTHS VS. INDIANA (CONT'D)

Base: Existing Markets



Hot Button

Base: Existing Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE  
WEAKNESSES VS. INDIANA



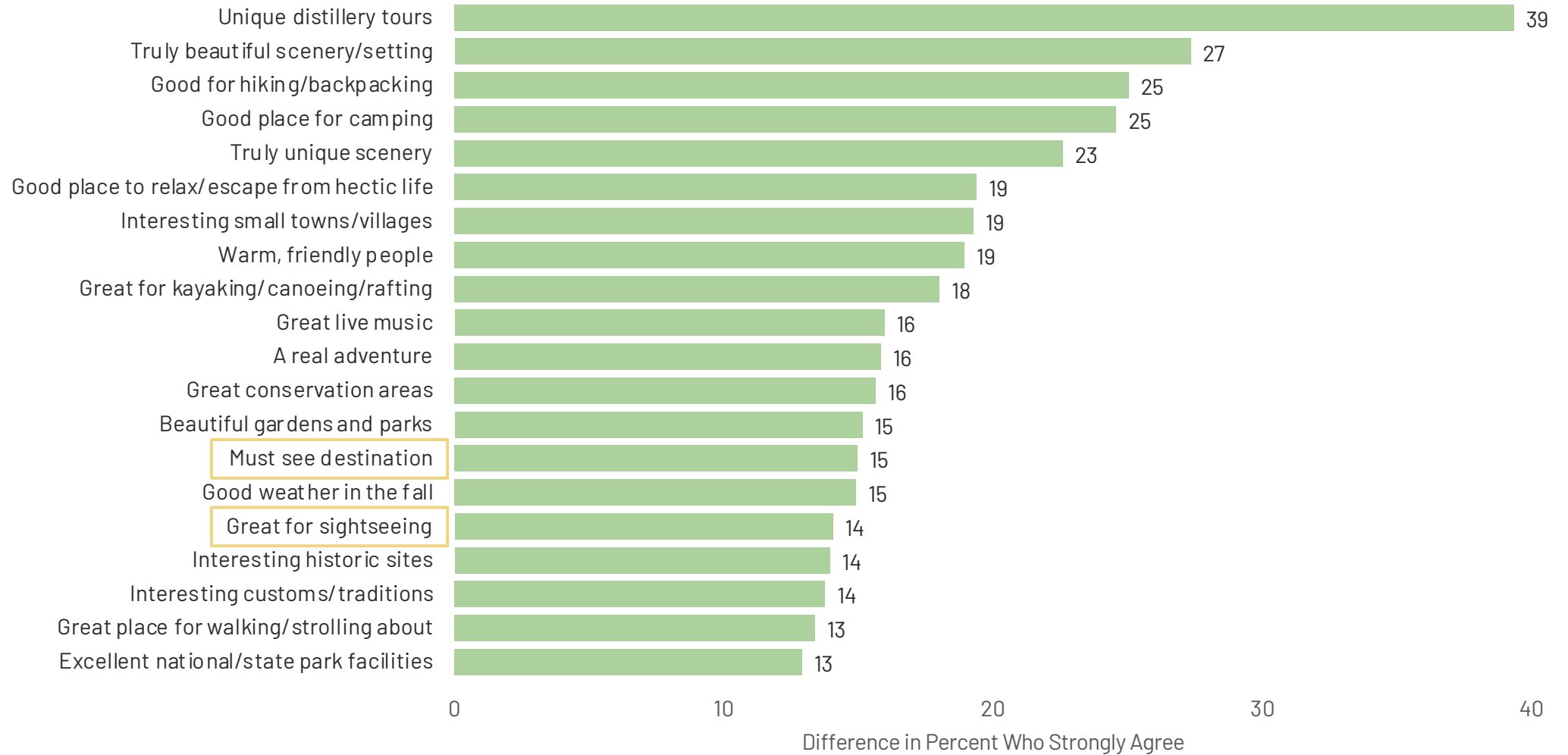
# KENTUCKY VS. OHIO: IMAGE STRENGTHS AND WEAKNESSES





# IMAGE STRENGTHS VS. OHIO

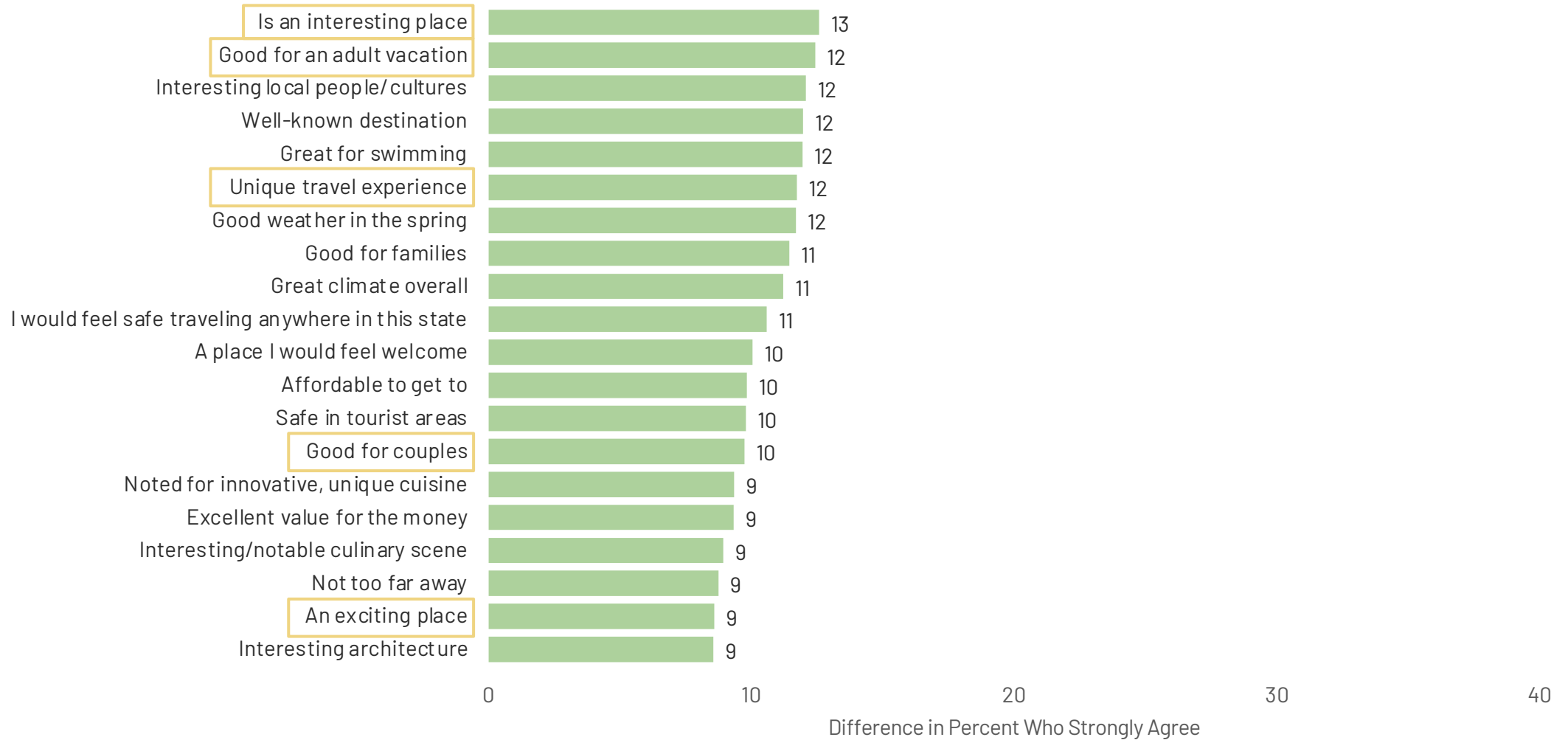
Base: Existing Markets



Hot Button

# IMAGE STRENGTHS VS. OHIO (CONT'D)

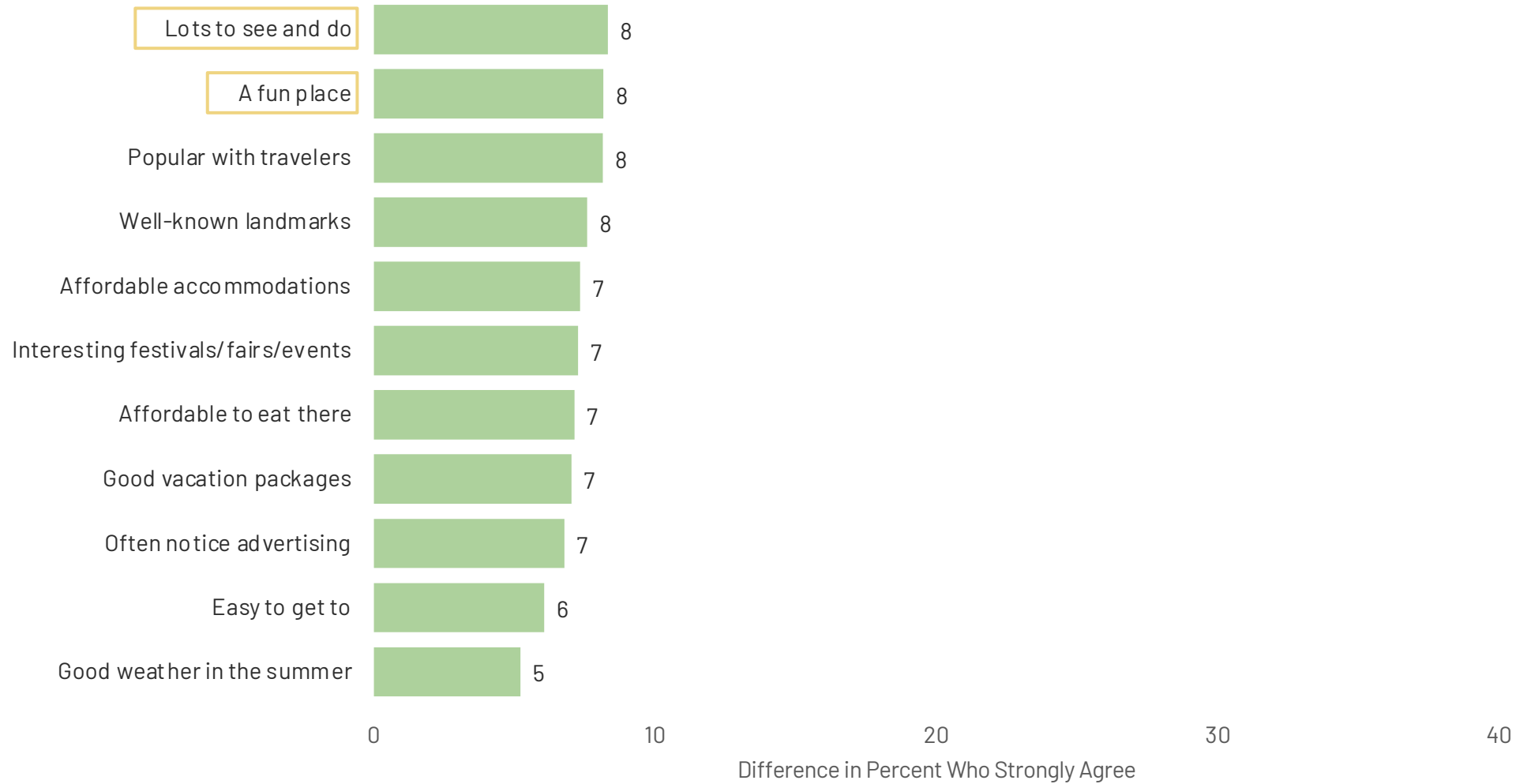
Base: Existing Markets



Hot Button

# IMAGE STRENGTHS VS. OHIO (CONT'D)

Base: Existing Markets



Hot Button

Base: Existing Markets

THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE  
WEAKNESSES VS. OHIO

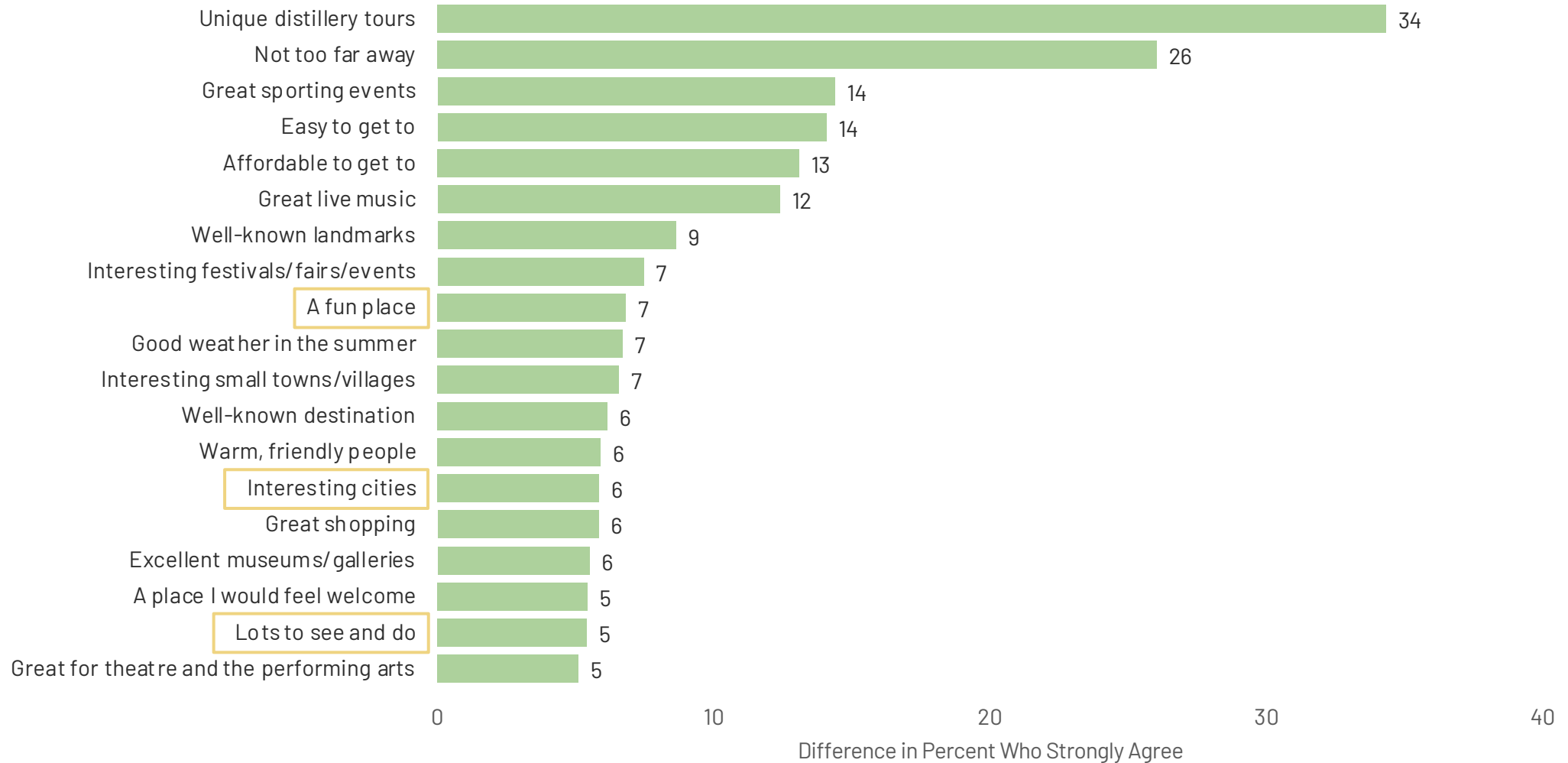


# KENTUCKY VS. WEST VIRGINIA: IMAGE STRENGTHS AND WEAKNESSES



# IMAGE STRENGTHS VS. WEST VIRGINIA

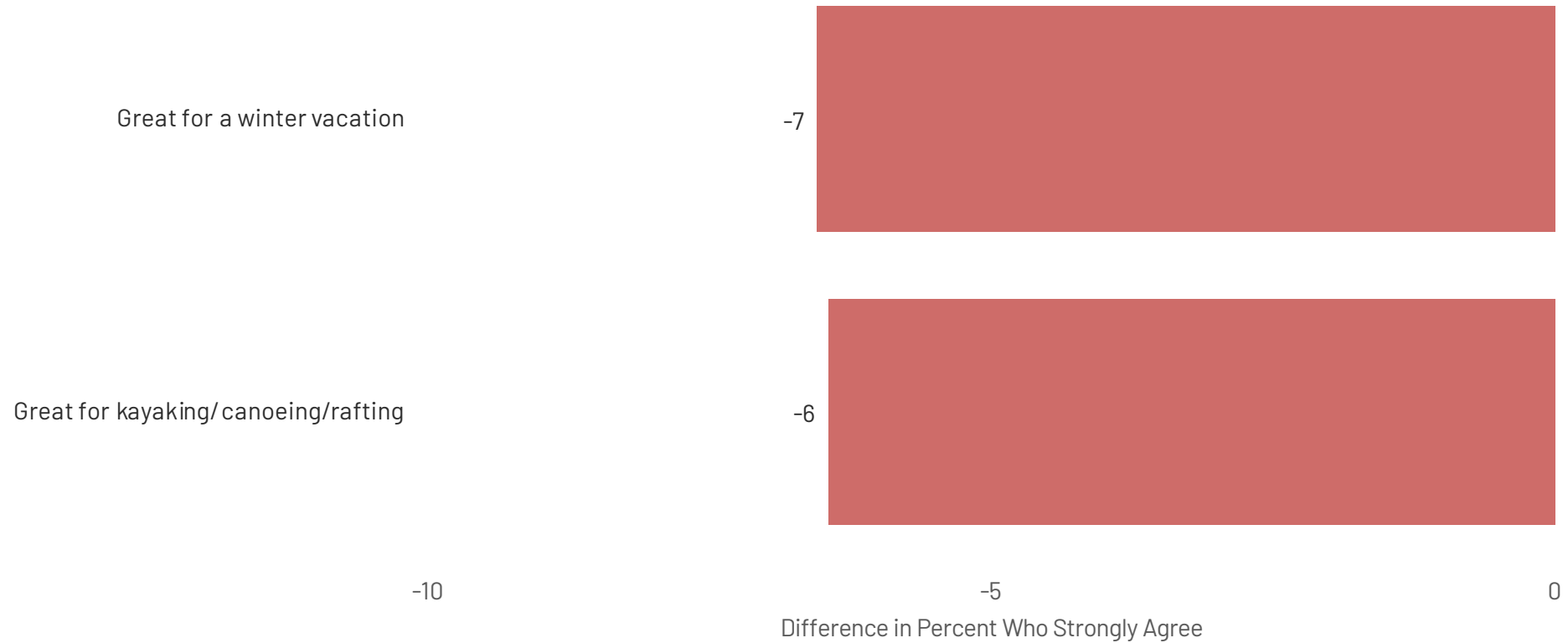
Base: Existing Markets



Hot Button

# IMAGE WEAKNESSES VS. WEST VIRGINIA

Base: Existing Markets





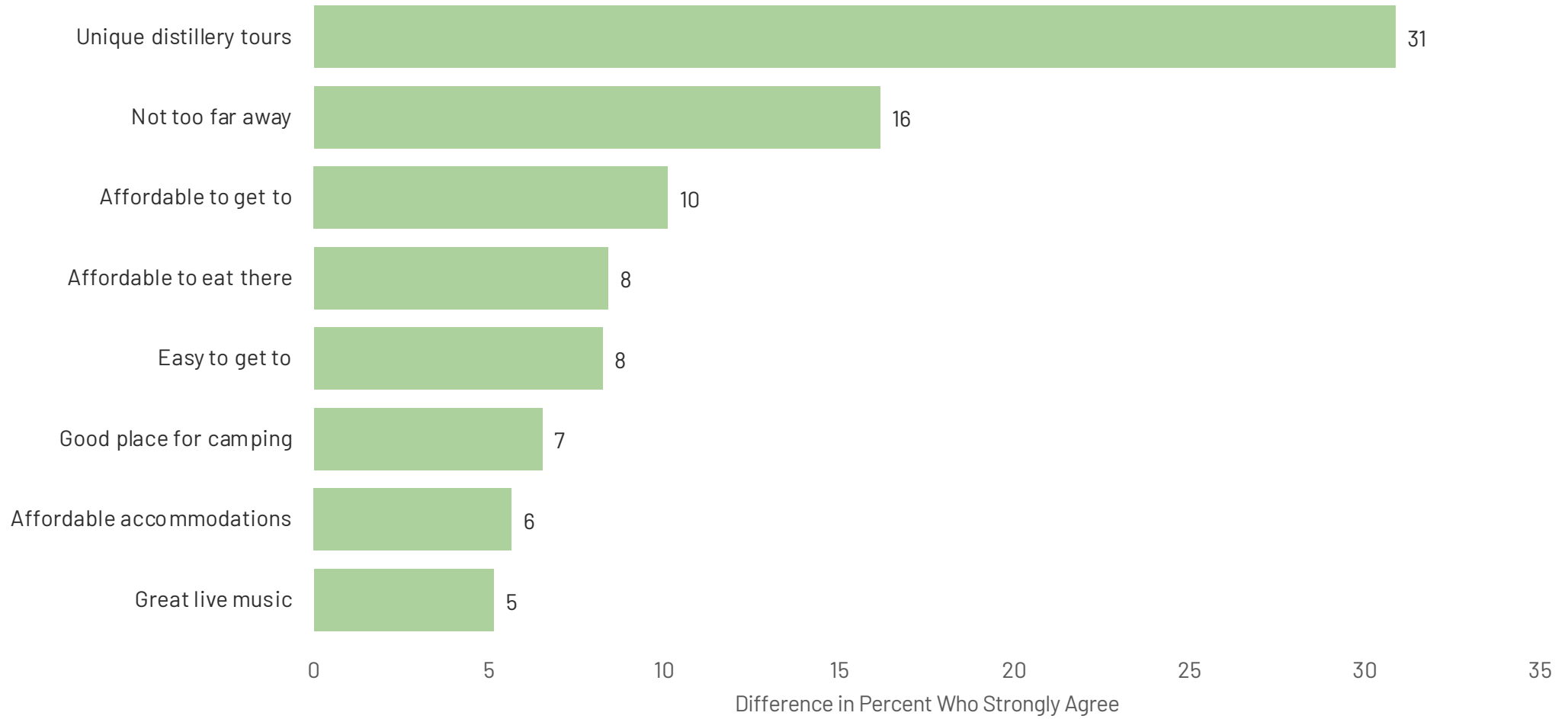
# KENTUCKY VS. NORTH CAROLINA: IMAGE STRENGTHS AND WEAKNESSES





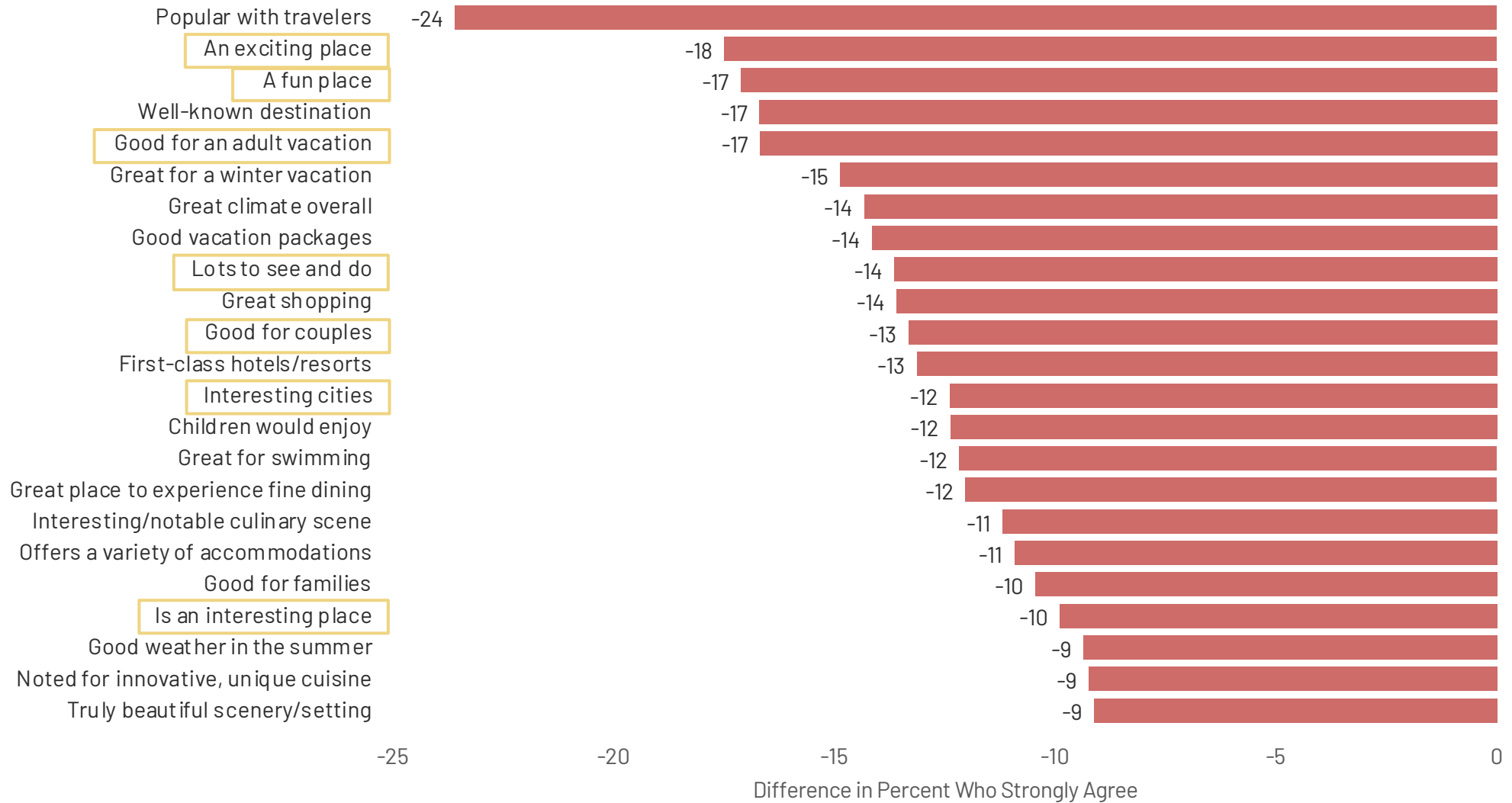
# IMAGE STRENGTHS VS. NORTH CAROLINA

Base: Existing Markets



# IMAGE WEAKNESSES VS. NORTH CAROLINA

Base: Existing Markets



Hot Button

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

Base: Existing Markets



Hot Button

TEAM   
KENTUCKY®

Longwoods  
INTERNATIONAL