

Kentucky 2023

Advertising ROI Research – New 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 **6 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**

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 New Markets** excludes Dayton and includes Champaign-Springfield-Decatur, Grand Rapids-Kalamazoo-Battle Creek, and 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

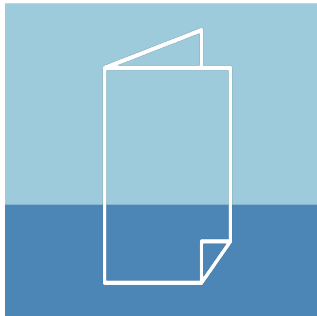
Base: New Markets

55%

Aware of
Any Ad

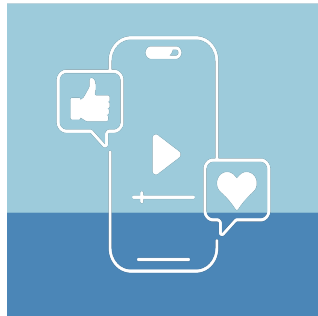
2022 Overall Awareness: 53%

PRINT AD AWARE



36%

SOCIAL AD AWARE



33%

DIGITAL AD AWARE



33%

RADIO AD AWARE



26%

VIDEO AD AWARE



26%

OUT-OF-HOME
AD AWARE

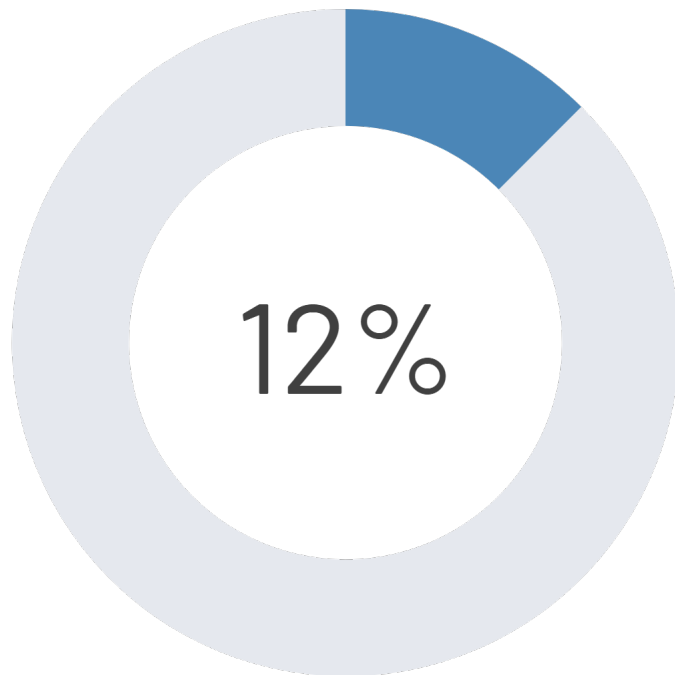


21%

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

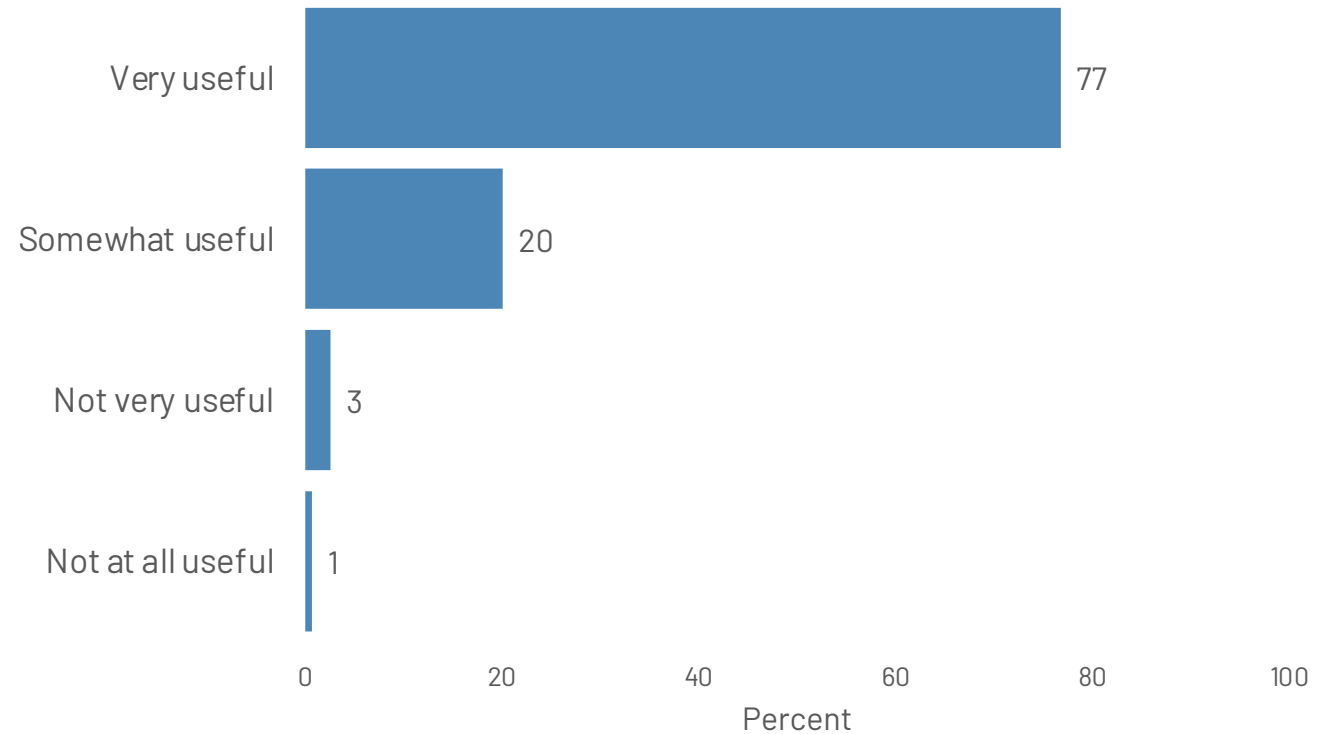
Base: New Markets

Awareness of Website



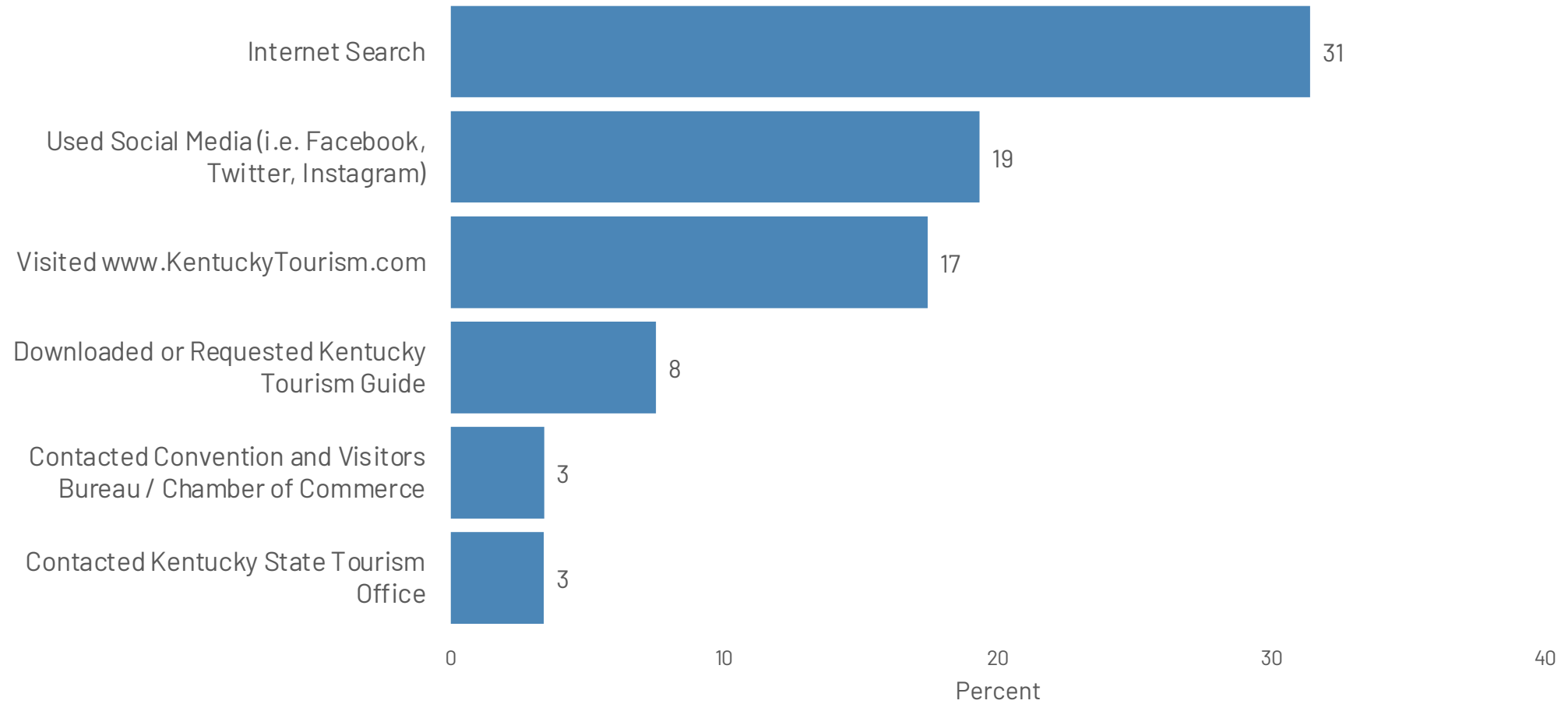
2022 Awareness of Website: 14%

How useful was the Tourism Kentucky website?



ACTIONS TAKEN TO OBTAIN INFORMATION ABOUT TRAVELING TO KENTUCKY

Base: New Markets



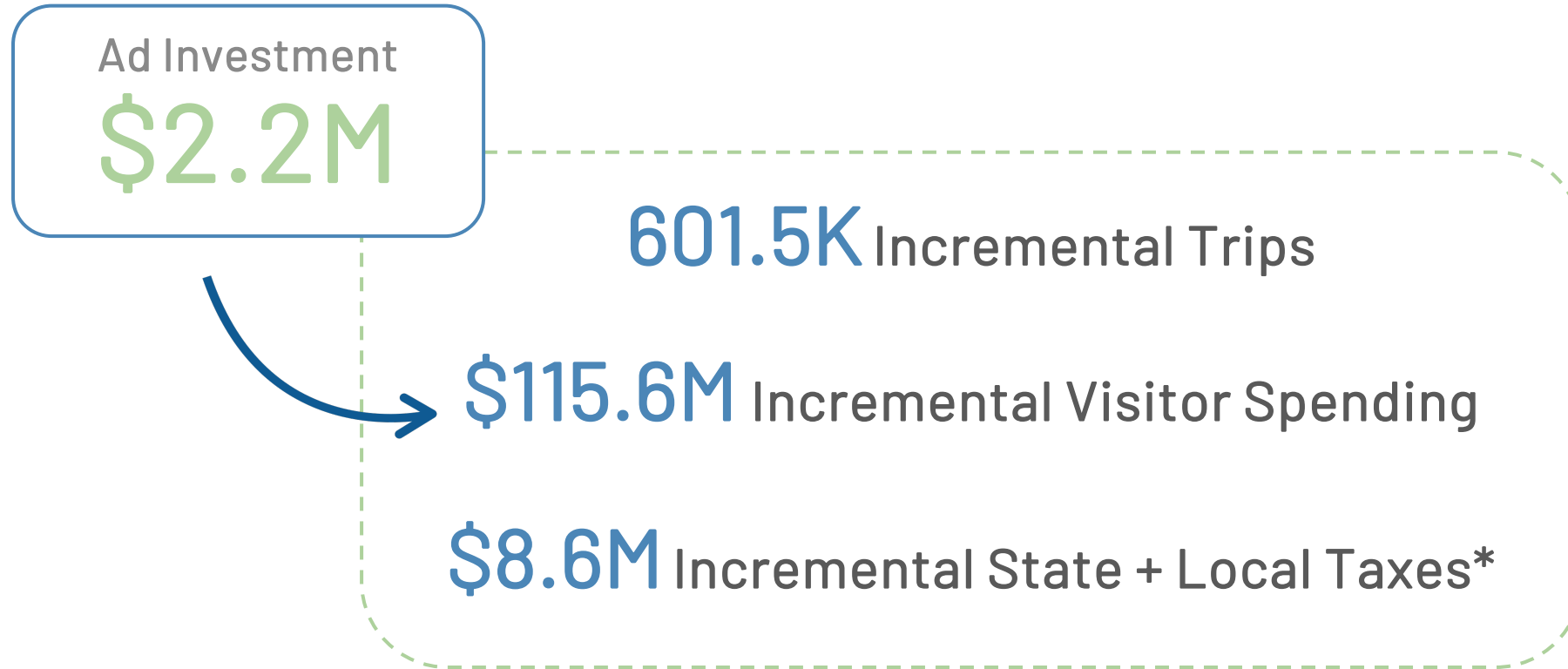


[RETURN ON INVESTMENT]



RETURN ON INVESTMENT: 2023

Base: New Markets



*Effective Tax Rate 7.4% (from Tourism Economics)

Base: New Markets

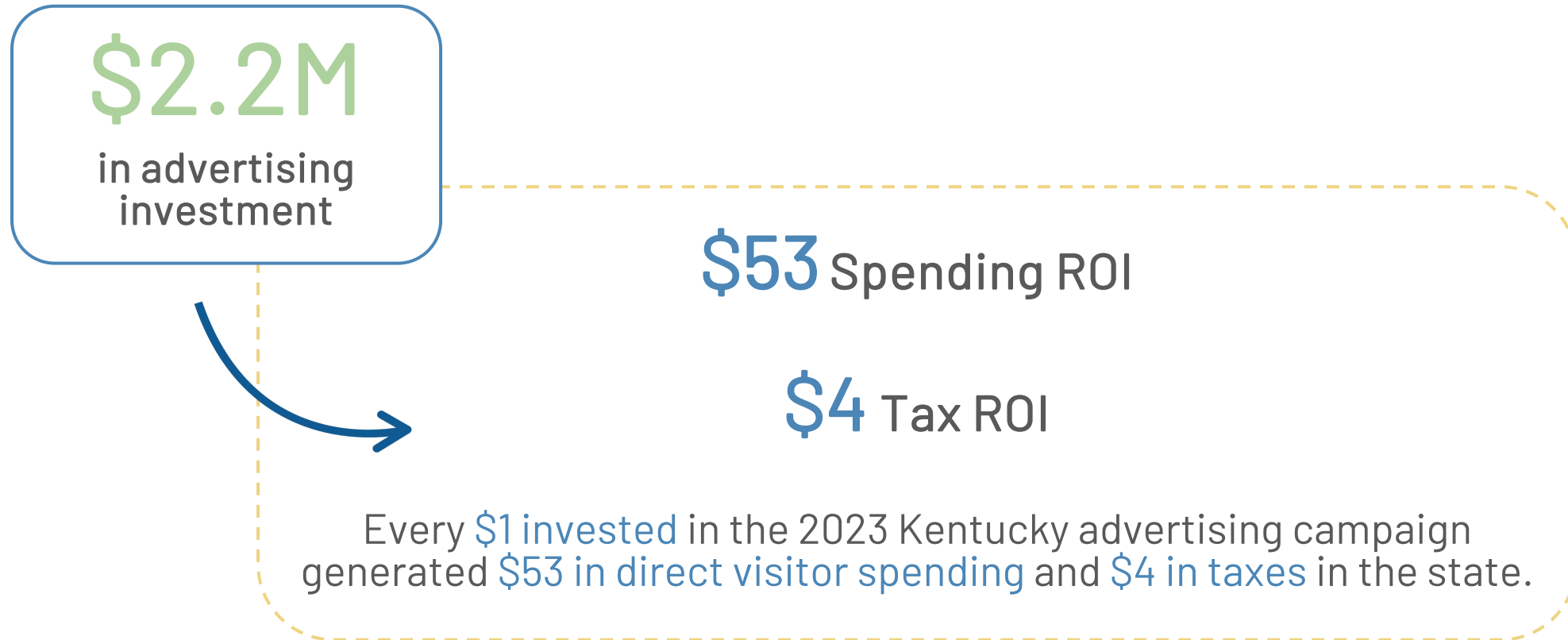
CAMPAIGN EFFICIENCY

Ad \$'s Per Trip: **\$3.66**

Trips Per Ad \$: **0.27**

THE BOTTOM LINE: 2023

Base: New Markets



*Effective Tax Rate 7.4% (from Tourism Economics)

Base: New Markets

New Markets

	2021	2022*	2023*
Spending ROI	\$101	\$49	\$53
Tax ROI	\$8	\$4	\$4

*2022 New Markets: *Compared to 2021, fielding this study in fewer markets resulted in a 69% decline in the number of new market travelers potentially exposed to the campaign.*

**2023 New Markets: *Compared to 2022 Markets - New Markets excludes Dayton and includes Champaign-Springfield-Decatur, Grand Rapids-Kalamazoo-Battle Creek, and Detroit.*



DESTINATION VISITATION
& INTEREST



PAST VISITATION

Base: New Markets



	Ever Visited	Visited in Past 2 Years*
North Carolina	47%	48%
Georgia	46%	48%
Ohio	39%	47%
West Virginia	34%	44%
Indiana	26%	44%
Tennessee	47%	41%
Kentucky	37%	37%

*Among those who have ever visited respective destination

INTENT TO VISIT IN NEXT 12 MONTHS

Base: New Markets

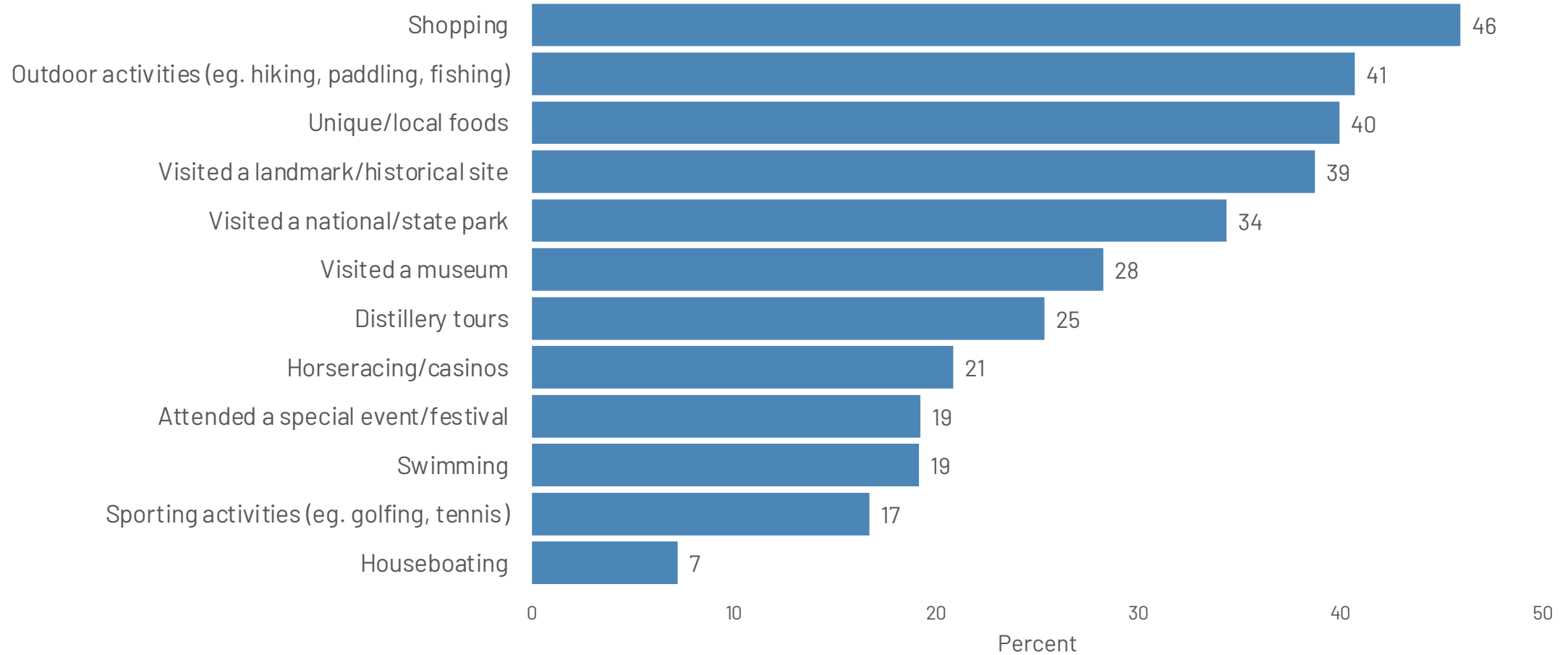


	Probably or Definitely Will Visit Destination in Next 12 Months*
North Carolina	47%
Georgia	44%
Tennessee	41%
Ohio	36%
West Virginia	36%
Indiana	31%
Kentucky	30%

*On a day or overnight leisure trip

ACTIVITIES PARTICIPATED ON OVERNIGHT TRIP TO KENTUCKY

Base: New Markets





[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

Unique

Luxurious

Popular

Entertainment

Family Atmosphere

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
- An exciting place
- A fun place
- A real adventure

Adult Destination

- Good for an adult vacation
- Good for couples

Sightseeing

- Lots to see and do
- Is an interesting place
- Interesting cities
- Great for sightseeing
- Interesting architecture
- Great shopping
- Well-known landmarks
- Truly beautiful scenery/setting
- Excellent museums/galleries
- Beautiful gardens and parks
- Great place for walking/strolling about
- Interesting historic sites
- 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

Luxurious

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

Popular

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

Entertainment

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

Family Atmosphere

Children would enjoy
Good for families

Worry-Free

Good place to relax/escape from hectic life
A place I would feel welcome
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 bicycling
Great for swimming
Good place for camping
Great sporting events

Climate

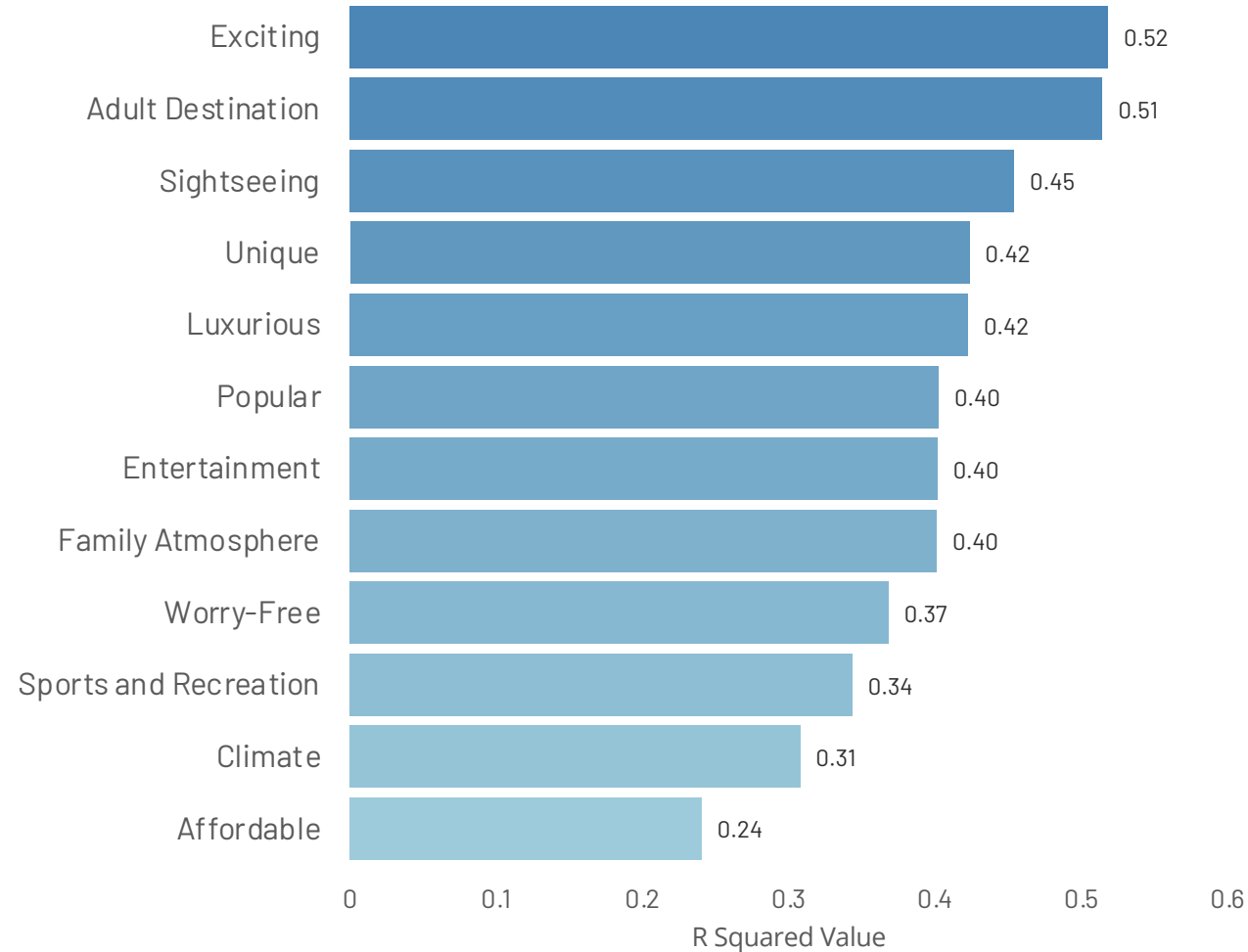
Great climate overall
Great for a winter vacation
Good weather in the spring
Good weather in the fall
Good weather in the summer

Affordable

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

TRAVEL MOTIVATORS

Base: New 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: New 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

An exciting place

Lots to see and do

Is an interesting place

Good for an adult vacation

A fun place

Good for couples

Interesting cities

Popular with travelers

Unique travel experience

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



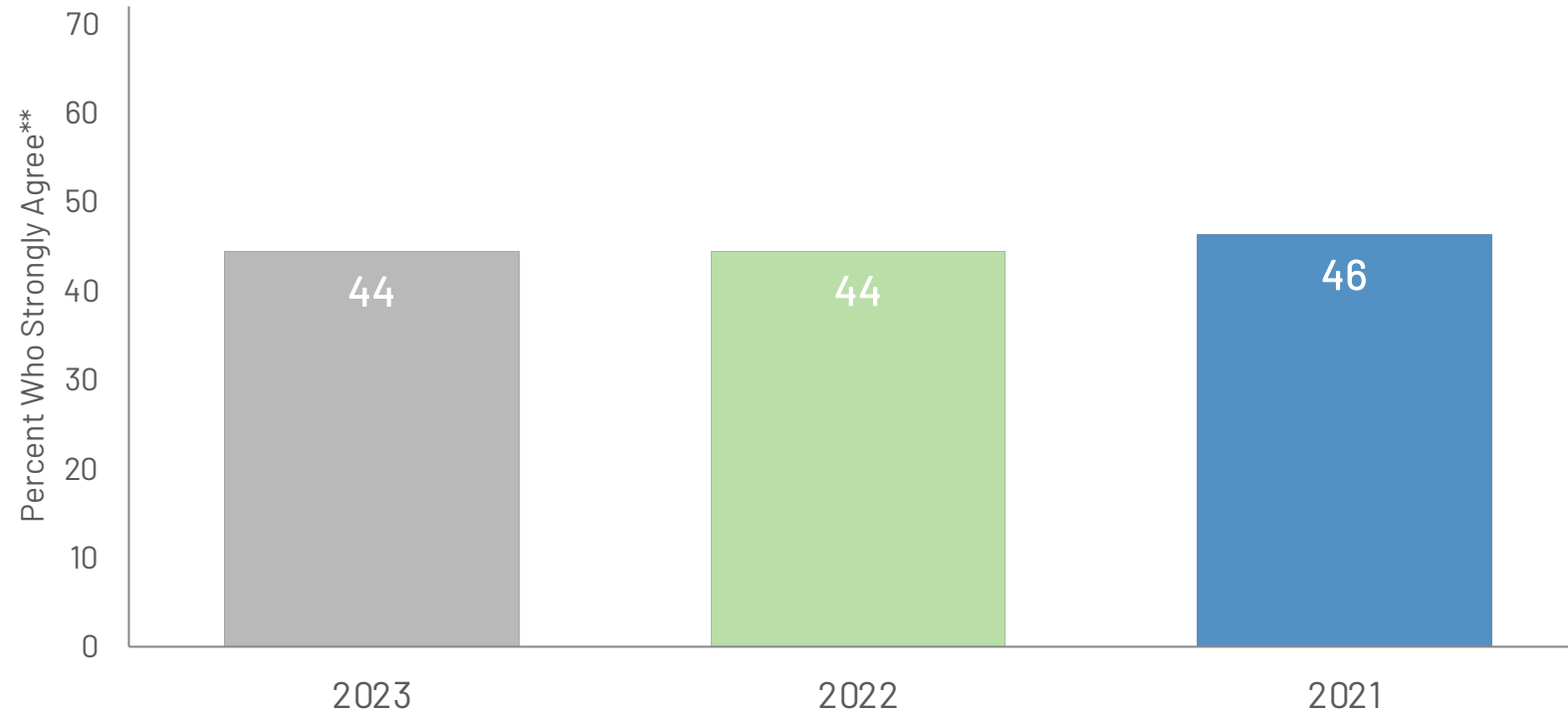
[KENTUCKY IMAGE
2023 vs 2022 vs 2021]



KENTUCKY'S IMAGE – 2023 vs 2022 vs 2021

Base: New Markets

"A Place I'd Really Enjoy Visiting"

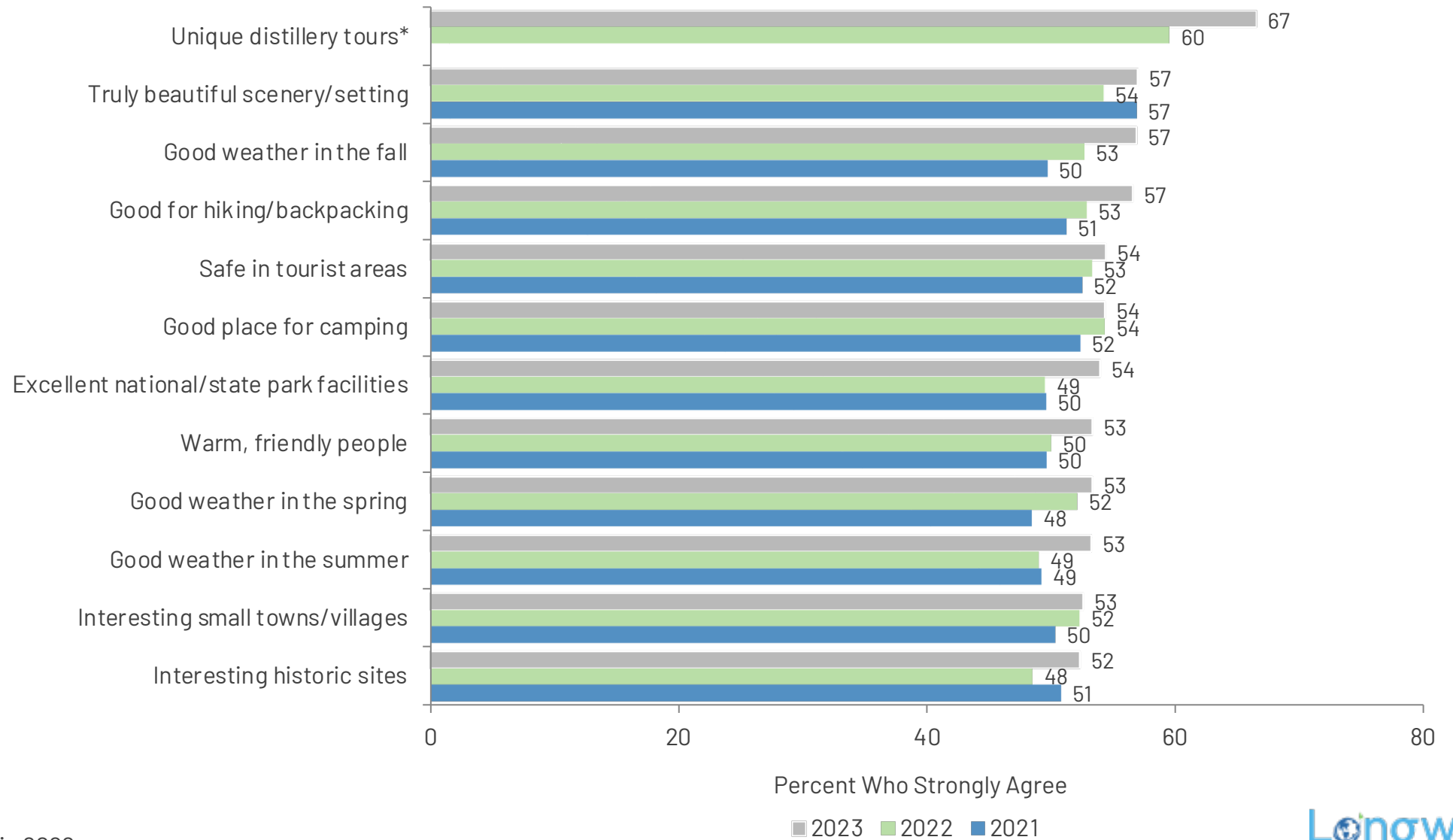


*Saw at least one ad

**"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

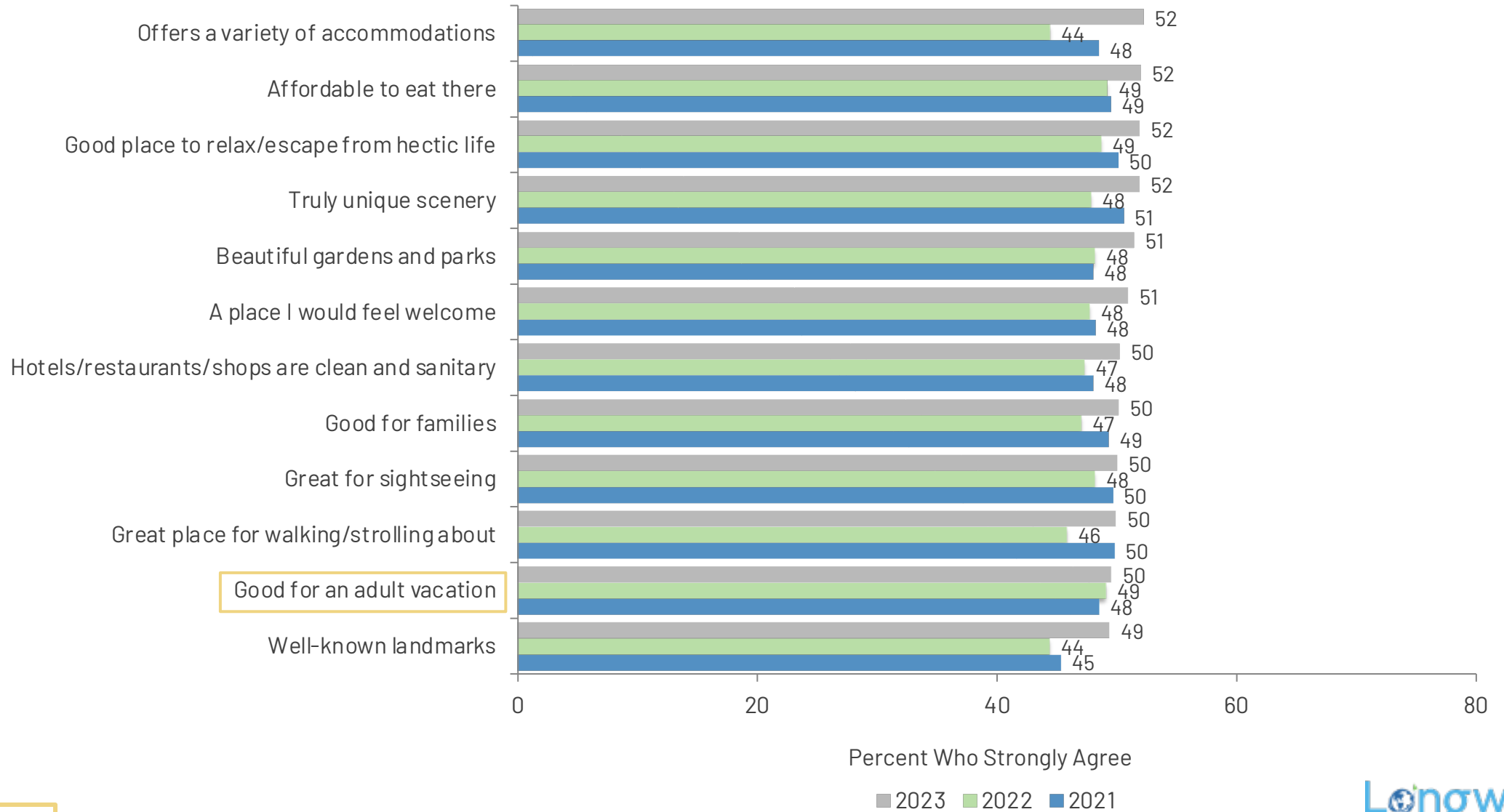
Base: New Markets



*Attribute added in 2022

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

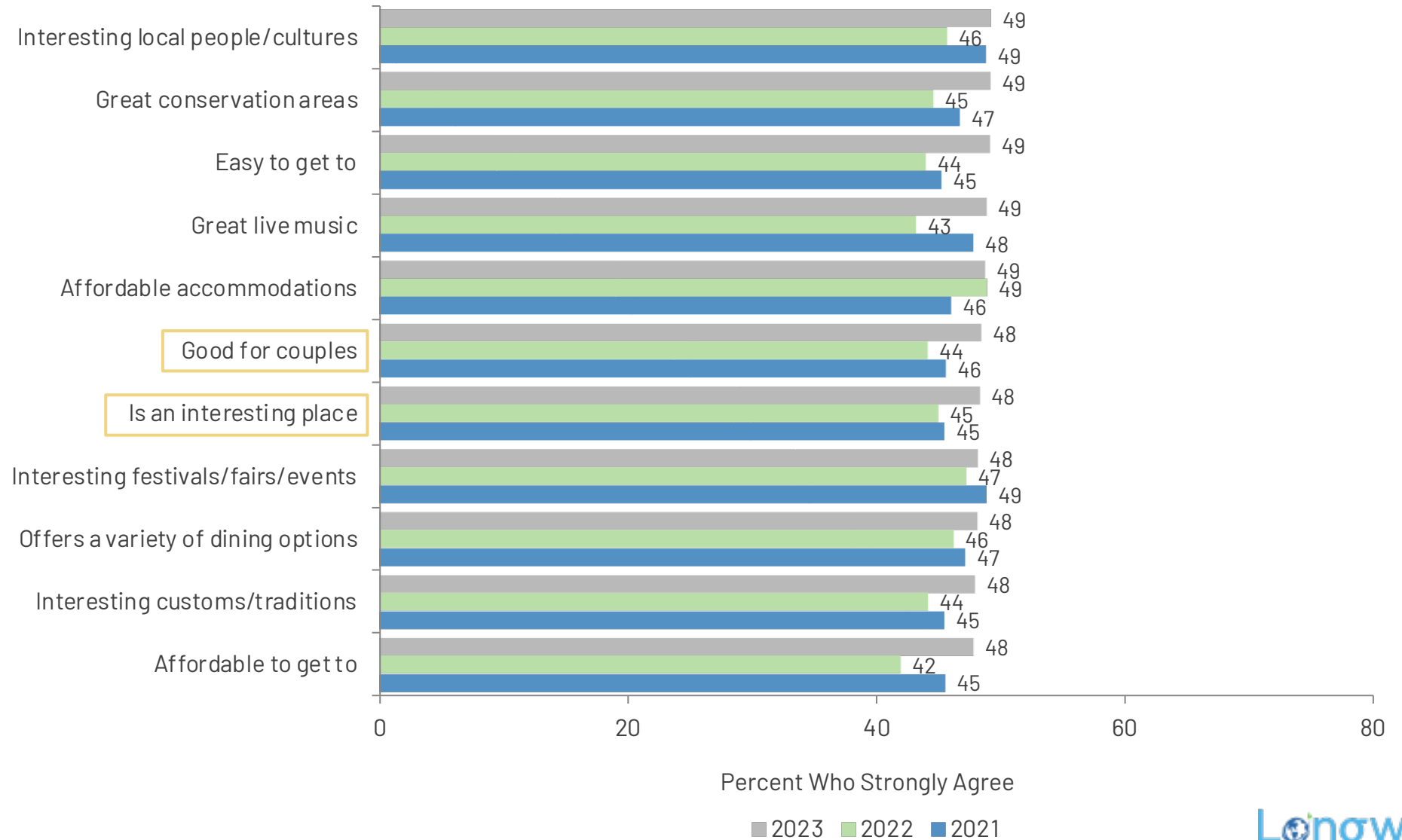
Base: New Markets



2023 Hot Button

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

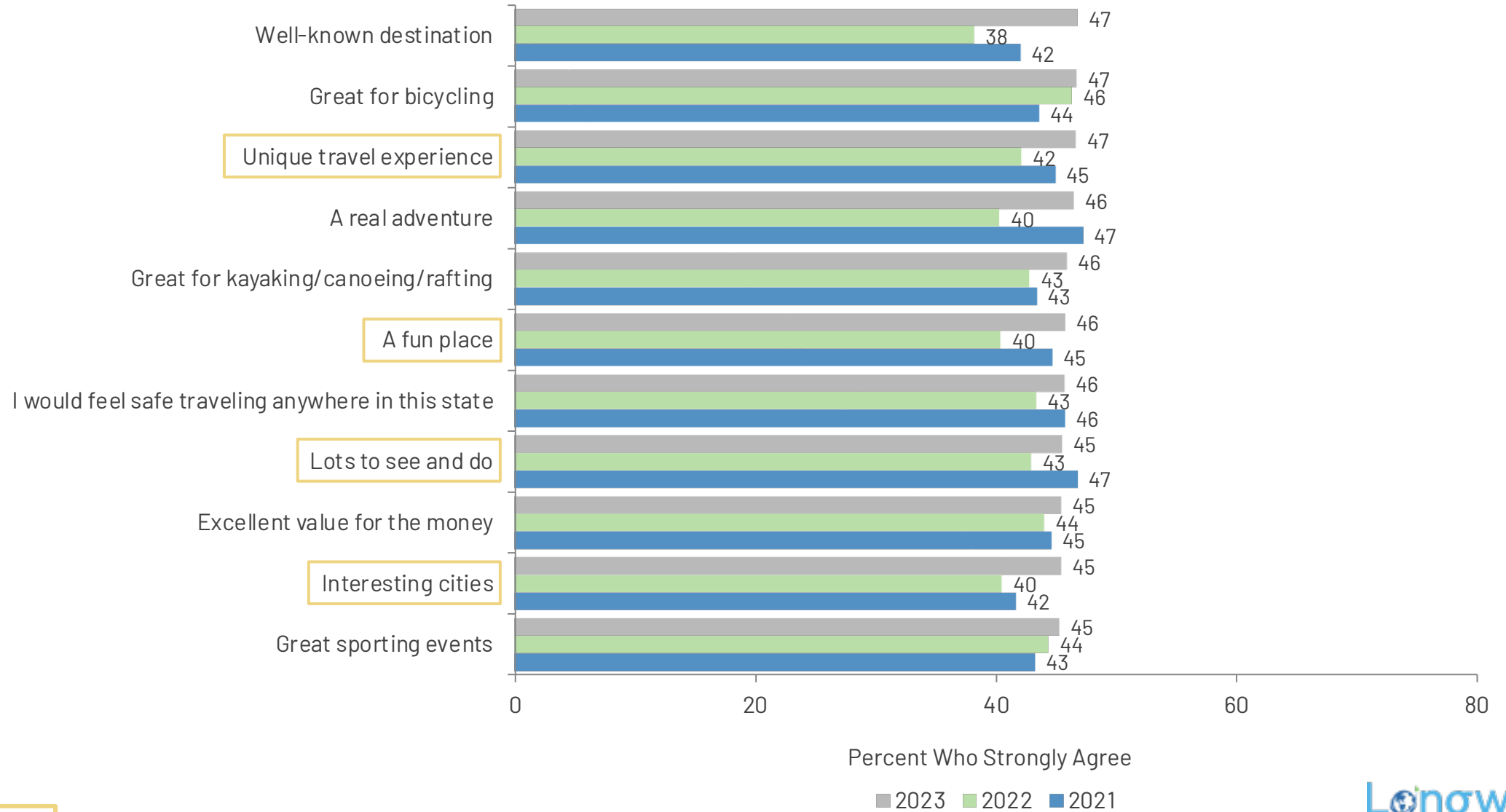
Base: New Markets



2023 Hot Button

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

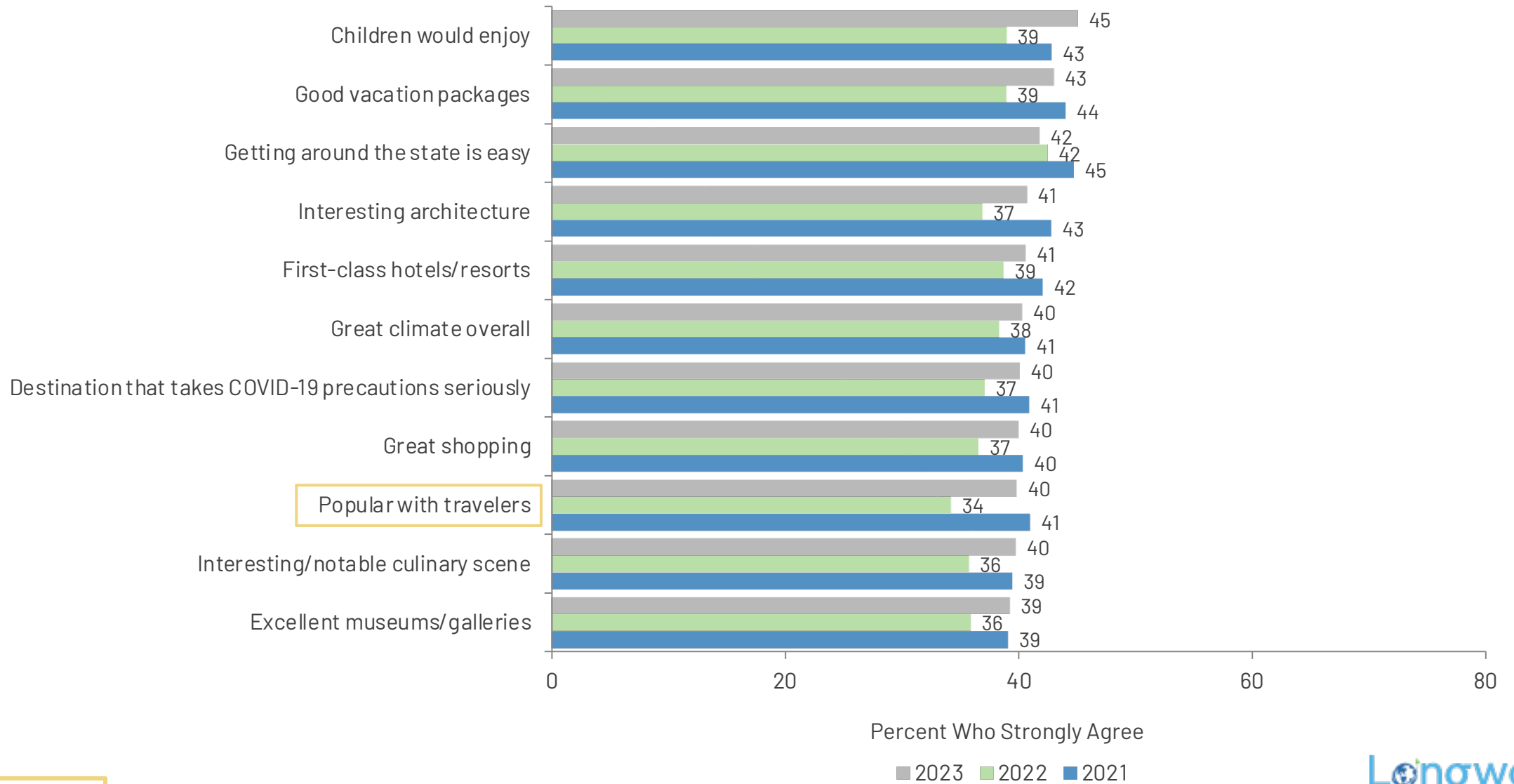
Base: New Markets



2023 Hot Button

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

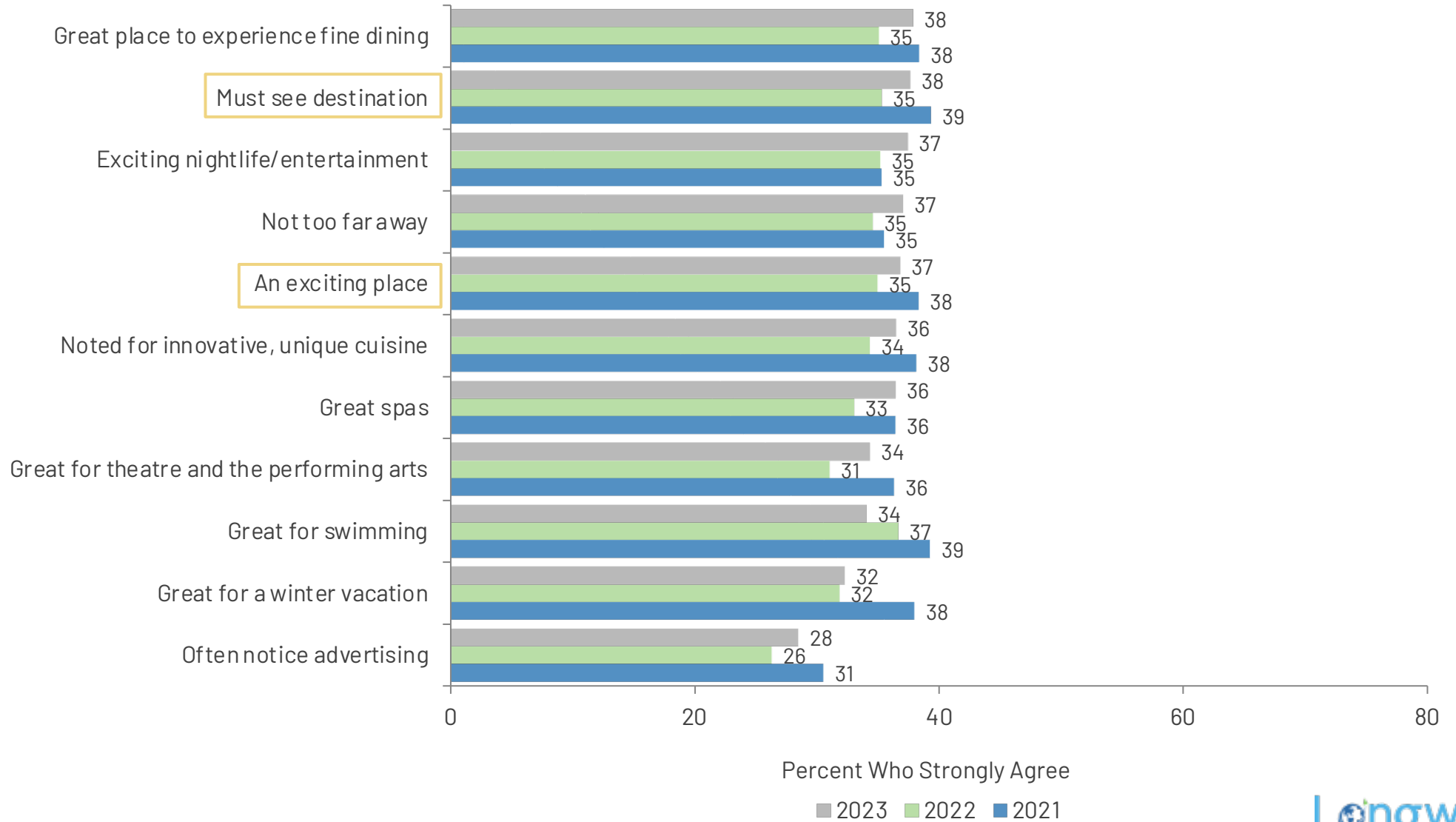
Base: New Markets



2023 Hot Button

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

Base: New Markets



2023 Hot Button



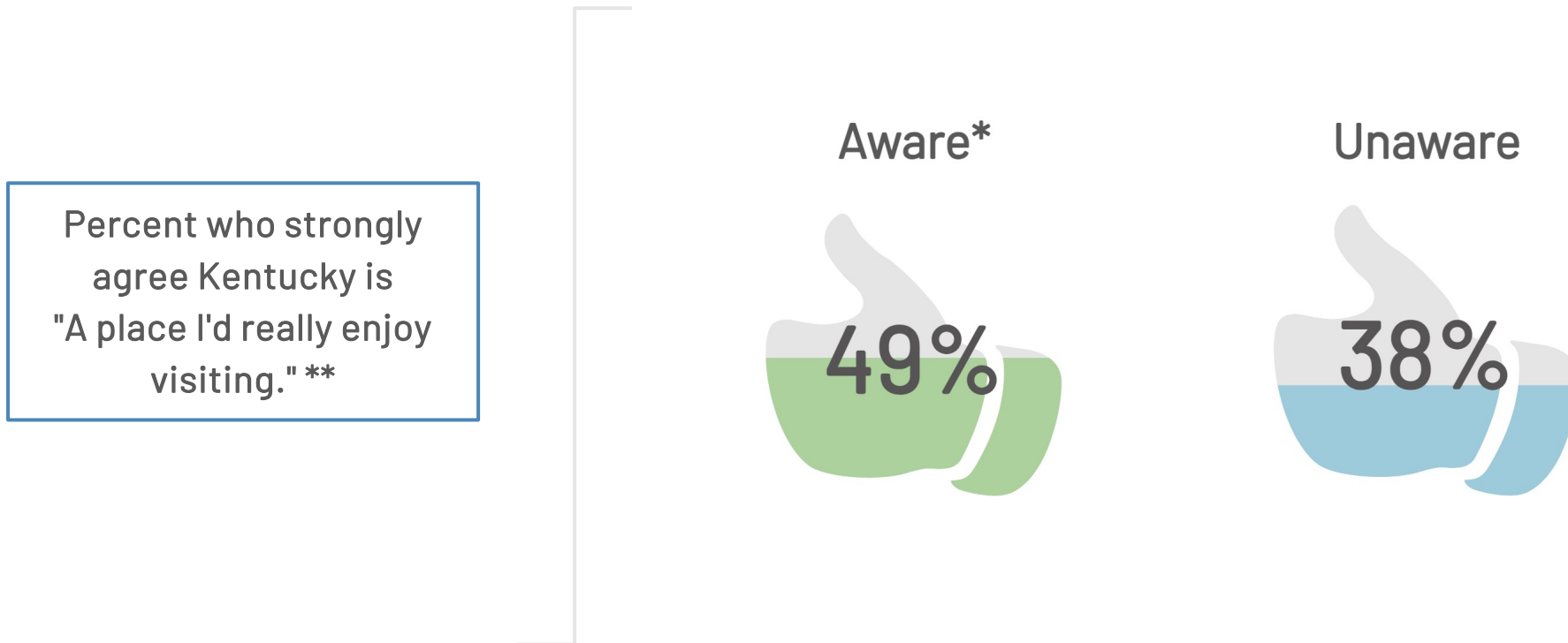
[ADVERTISING IMPACT ON IMAGE]



ADVERTISING IMPACT ON OVERALL IMAGE

Base: New 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

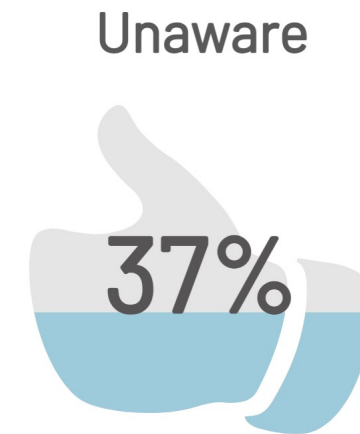
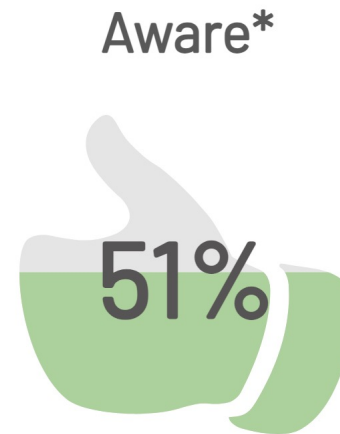
**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

ADVERTISING IMPACT ON OVERALL IMAGE

Base: New 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." **

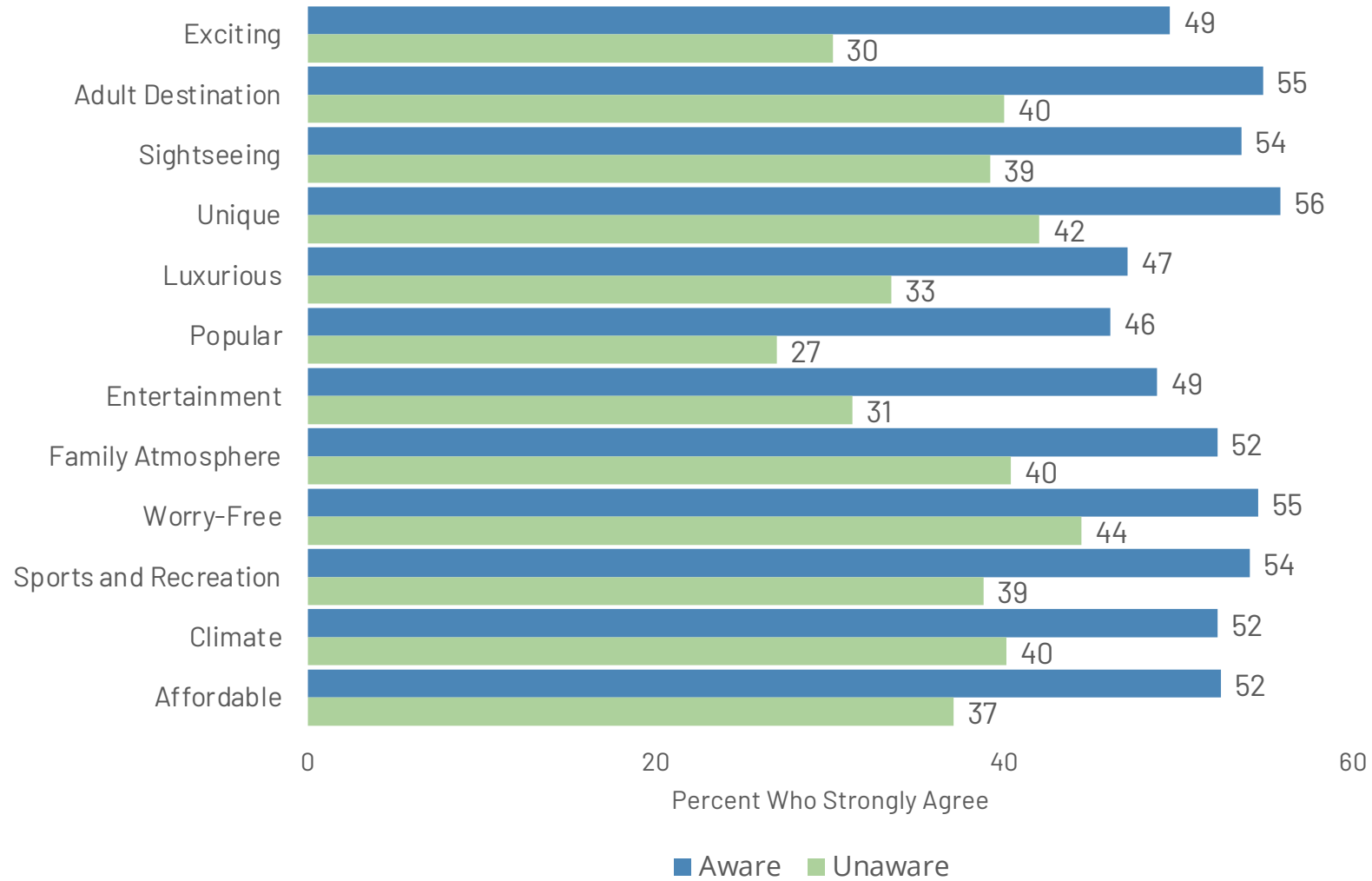


*Saw at least one ad

**"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: New Markets



HOT BUTTONS MOST IMPACTED BY ADVERTISING

Base: New Markets

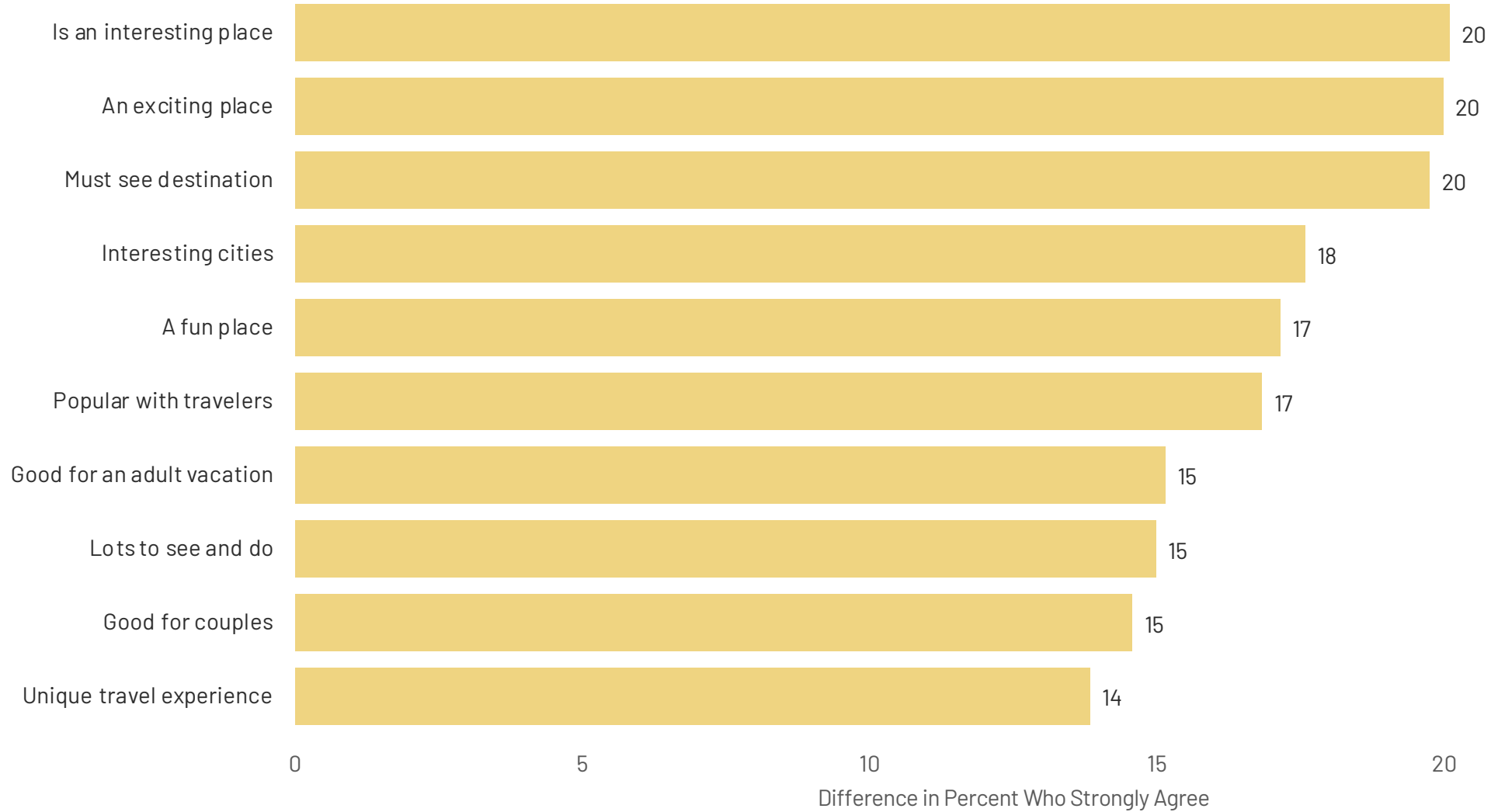
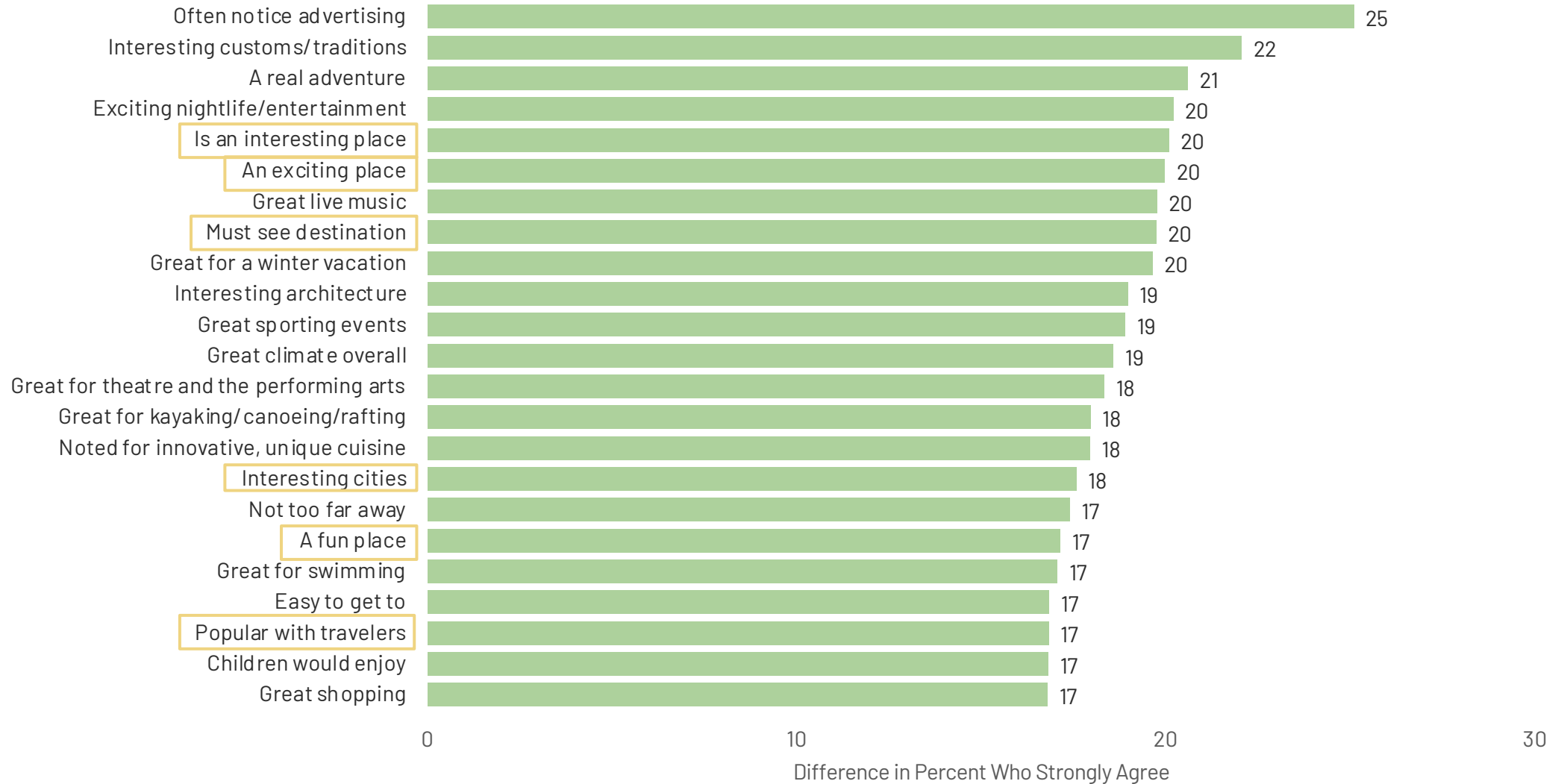


IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING

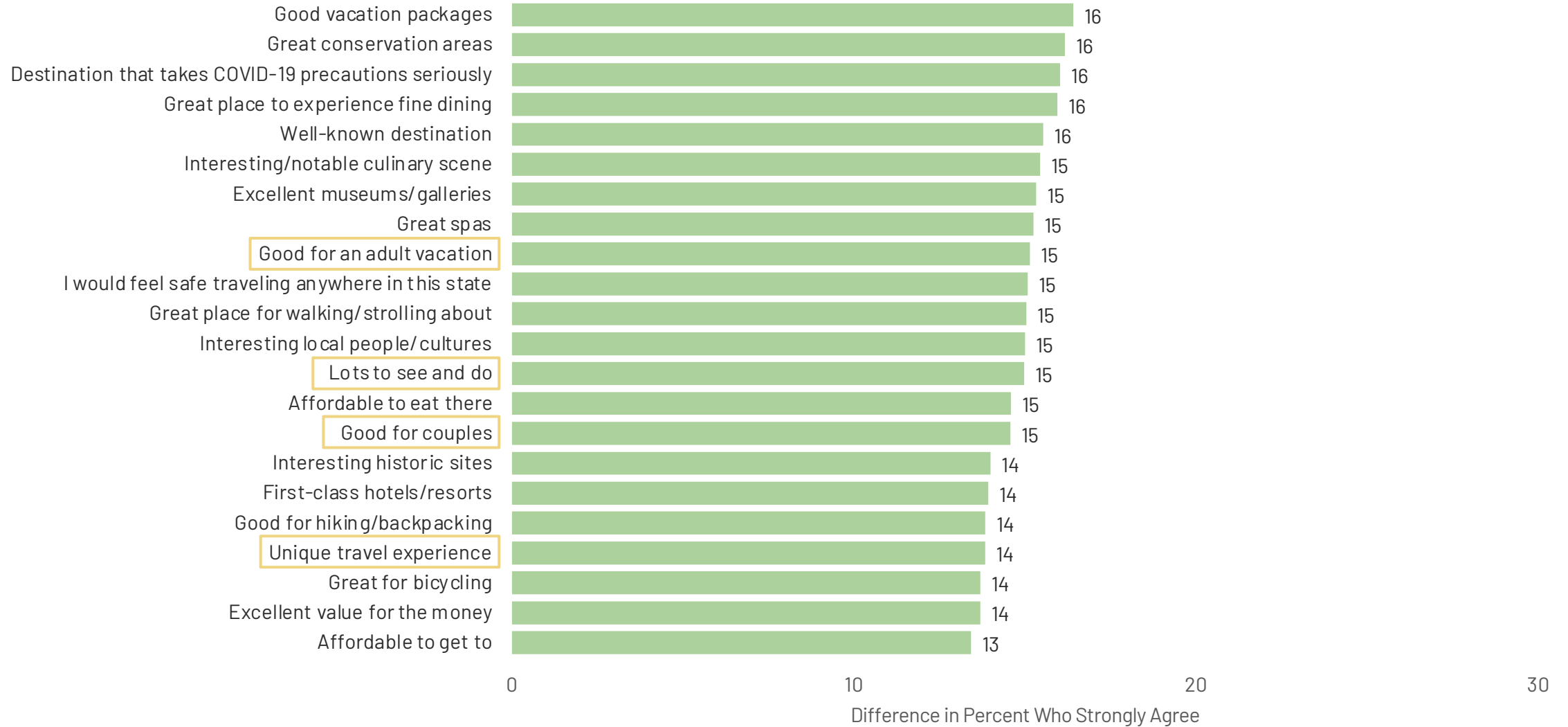
Base: New Markets



Hot Button

IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (CONT'D)

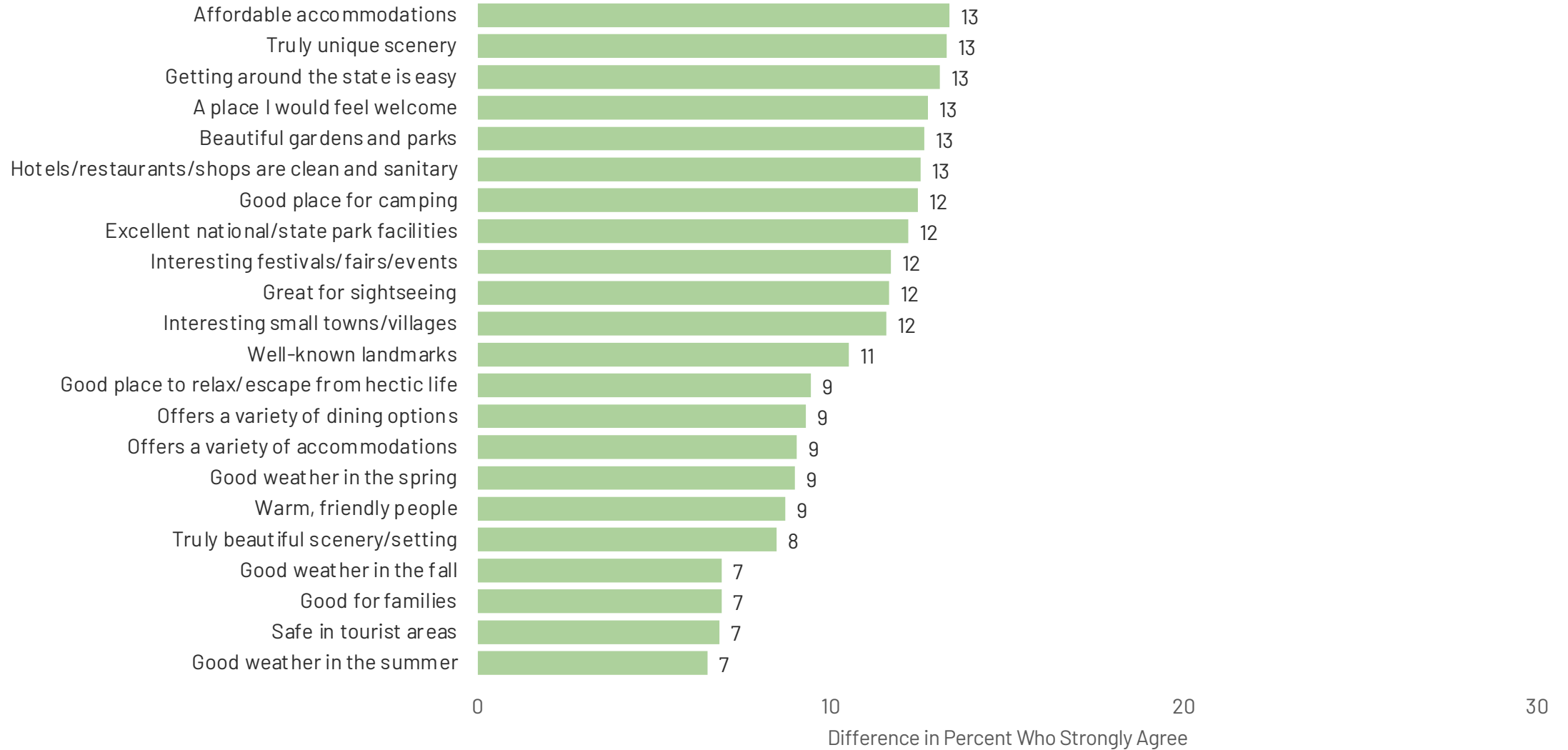
Base: New Markets



Hot Button

IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (CONT'D)

Base: New Markets



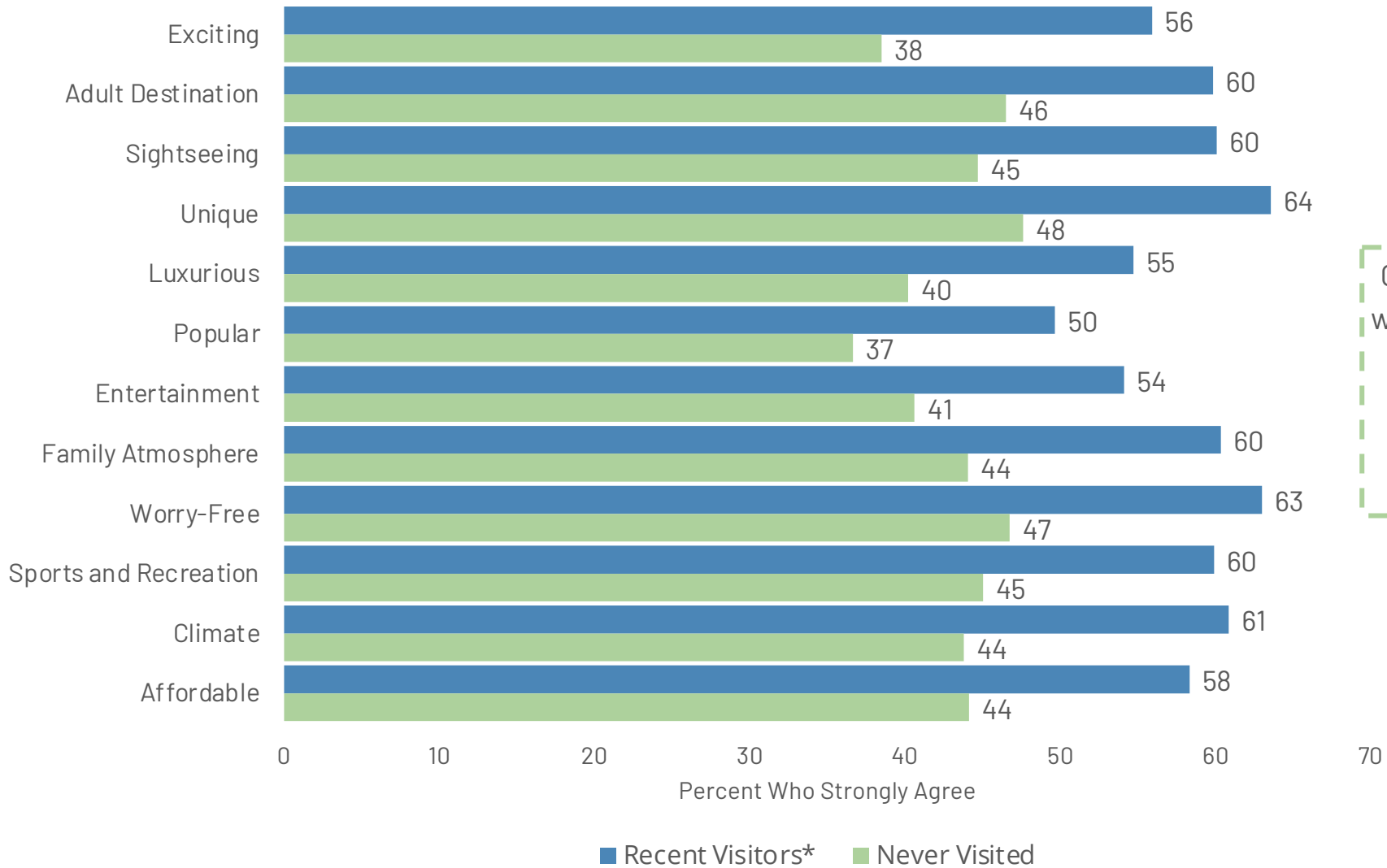


[PRODUCT DELIVERY]



PRODUCT VS. IMAGE

Base: New Markets

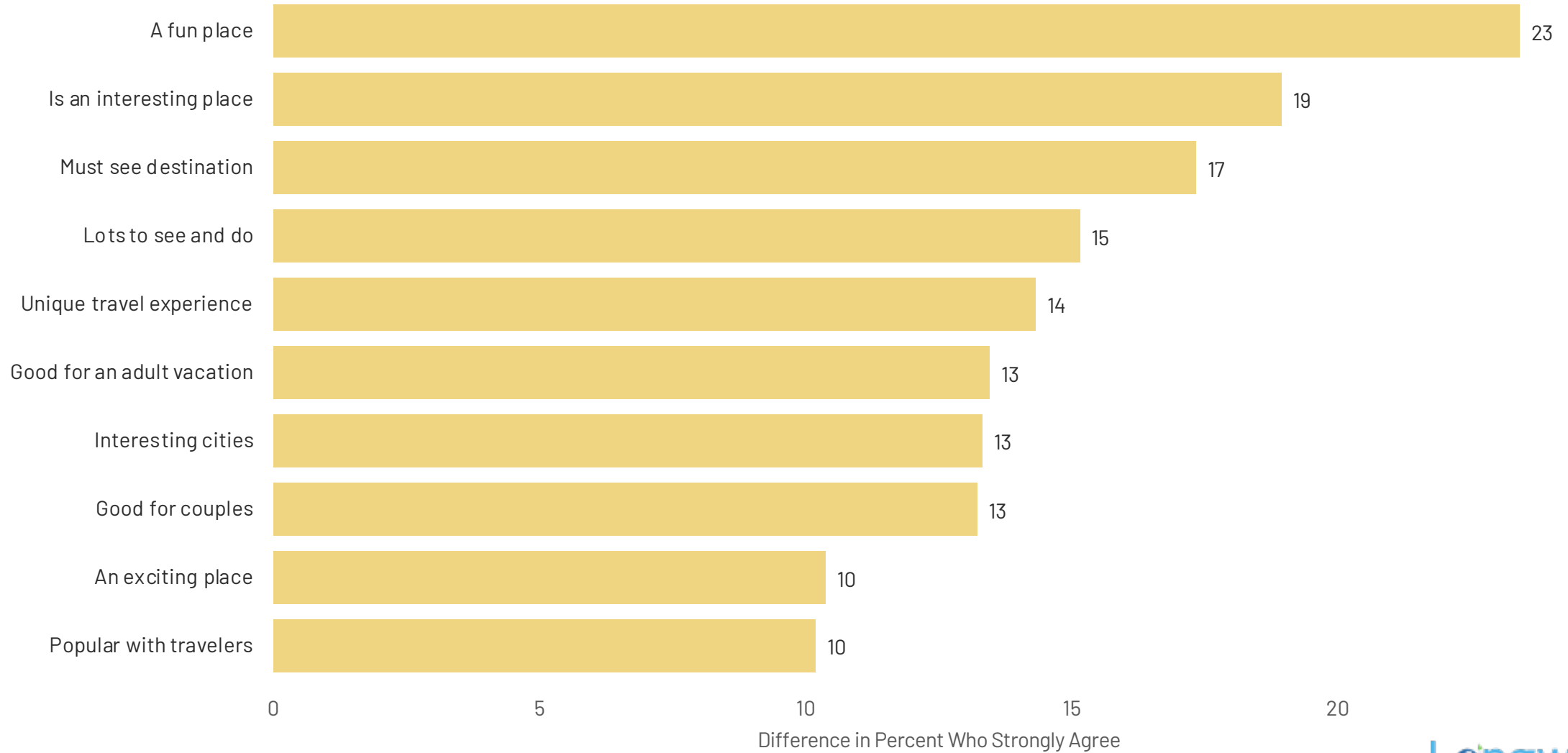


Comparing the image ratings of people who have **never visited** Kentucky versus that of those who have **visited in the past two years**, we have a measure of **“product delivery,”** the relative satisfaction of the two groups.

* Visited in the past 2 years

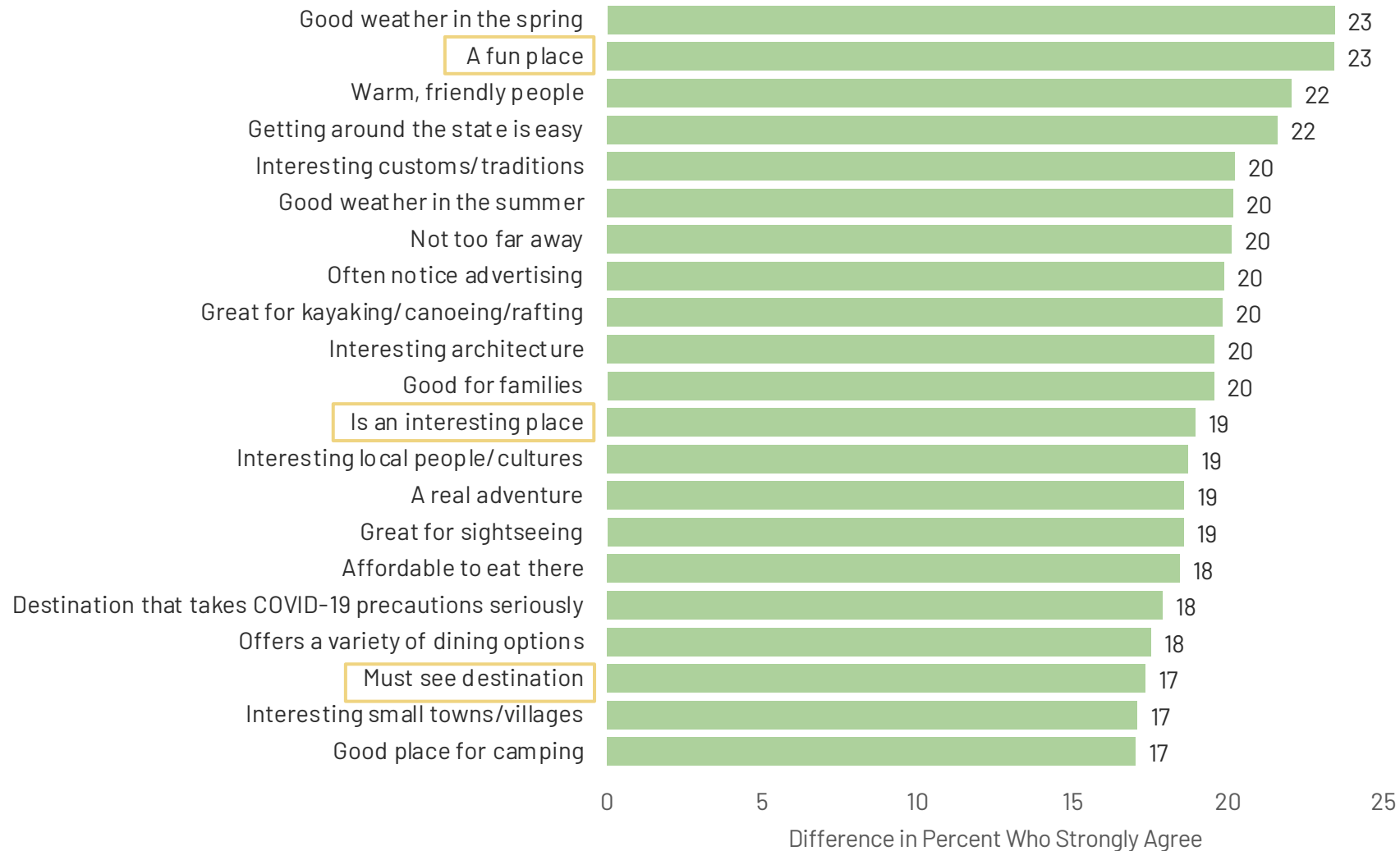
TOP PRODUCT STRENGTHS VS IMAGE - HOT BUTTONS

Base: New Markets



TOP PRODUCT STRENGTHS VS. IMAGE

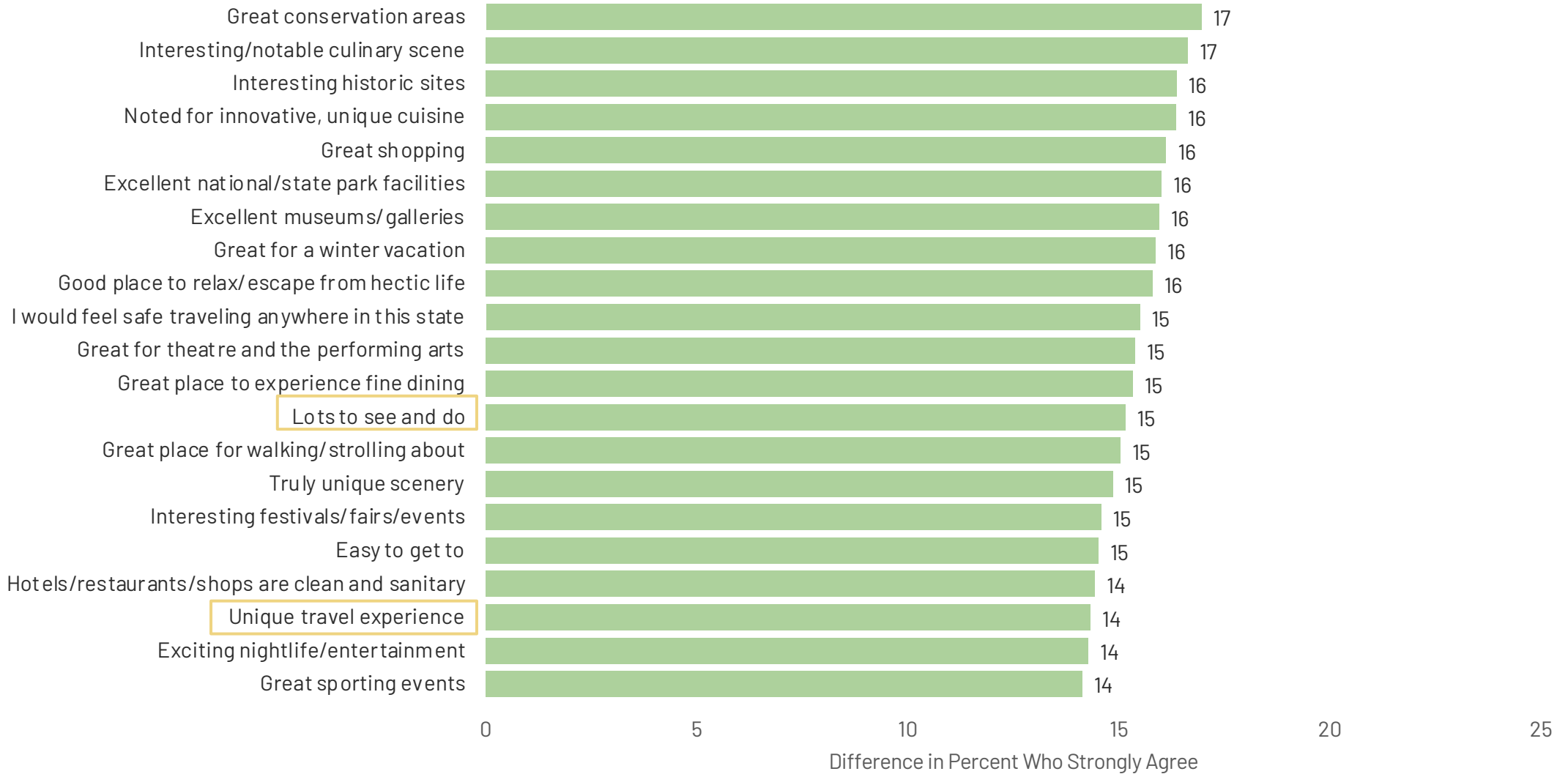
Base: New Markets



Hot Button

TOP PRODUCT STRENGTHS VS. IMAGE (CONT'D)

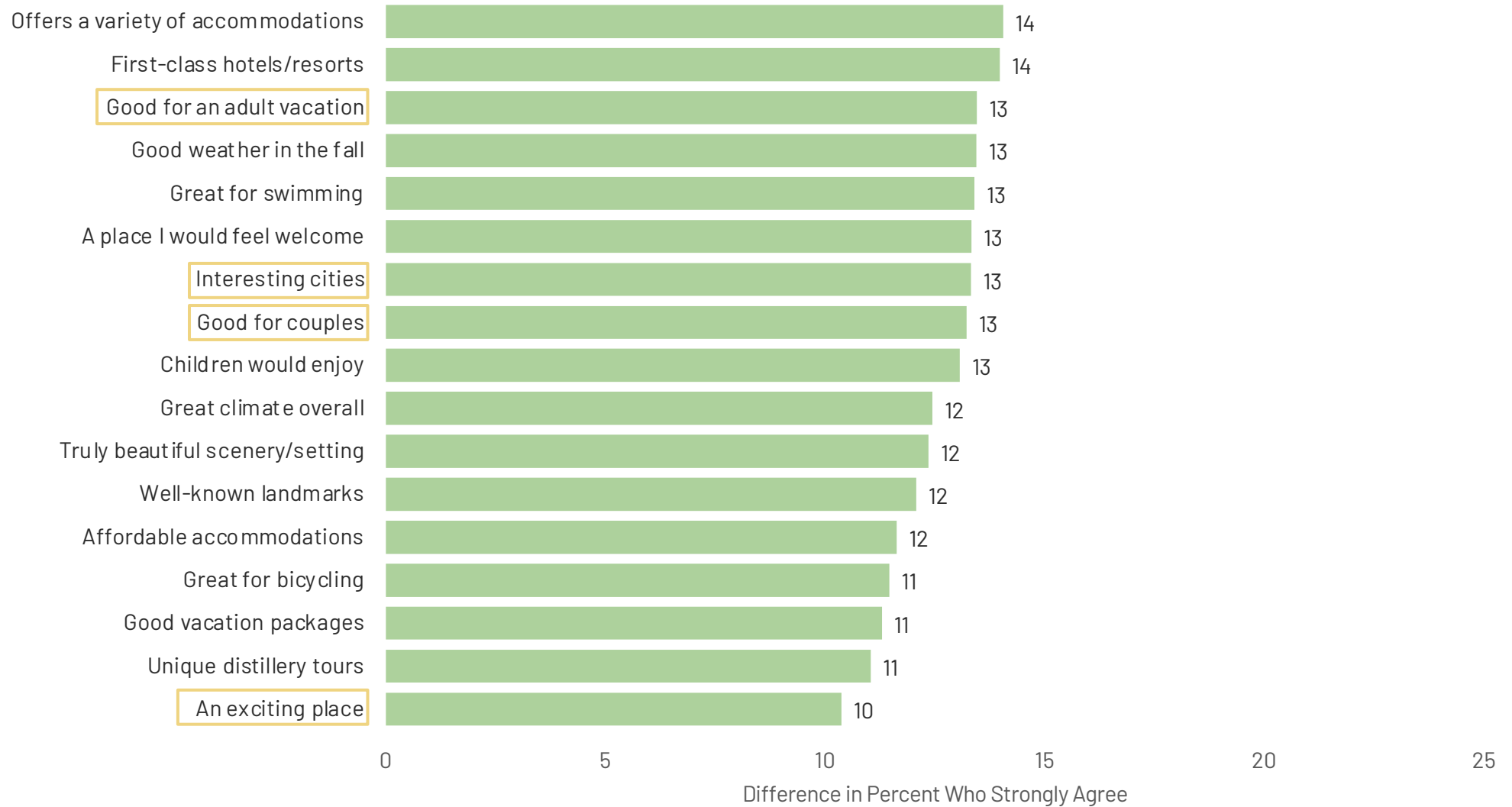
Base: New Markets



Hot Button

TOP PRODUCT STRENGTHS VS. IMAGE (CONT'D)

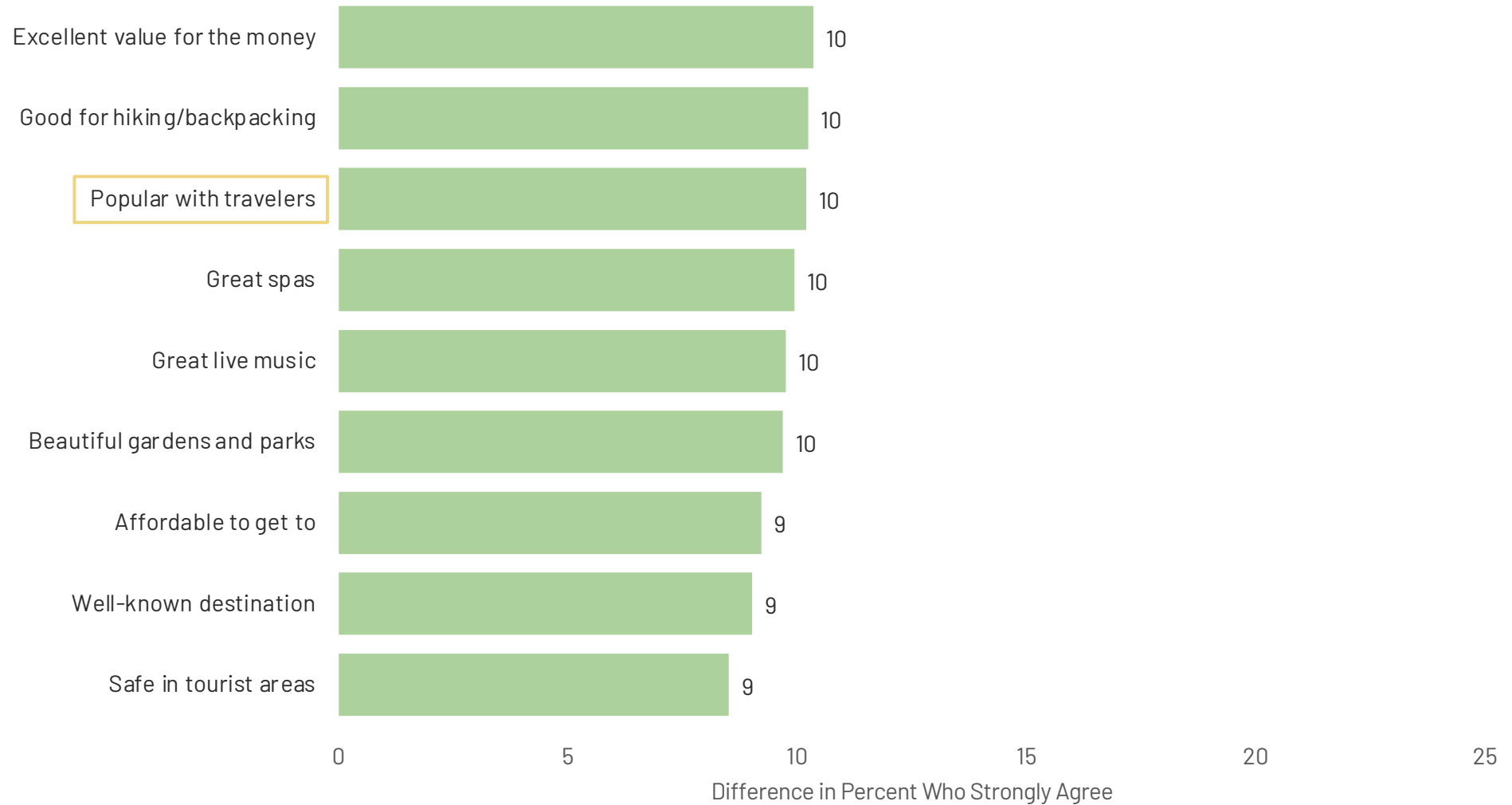
Base: New Markets



Hot Button

TOP PRODUCT STRENGTHS VS. IMAGE (CONT'D)

Base: New Markets



Hot Button

Base: New Markets

THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE

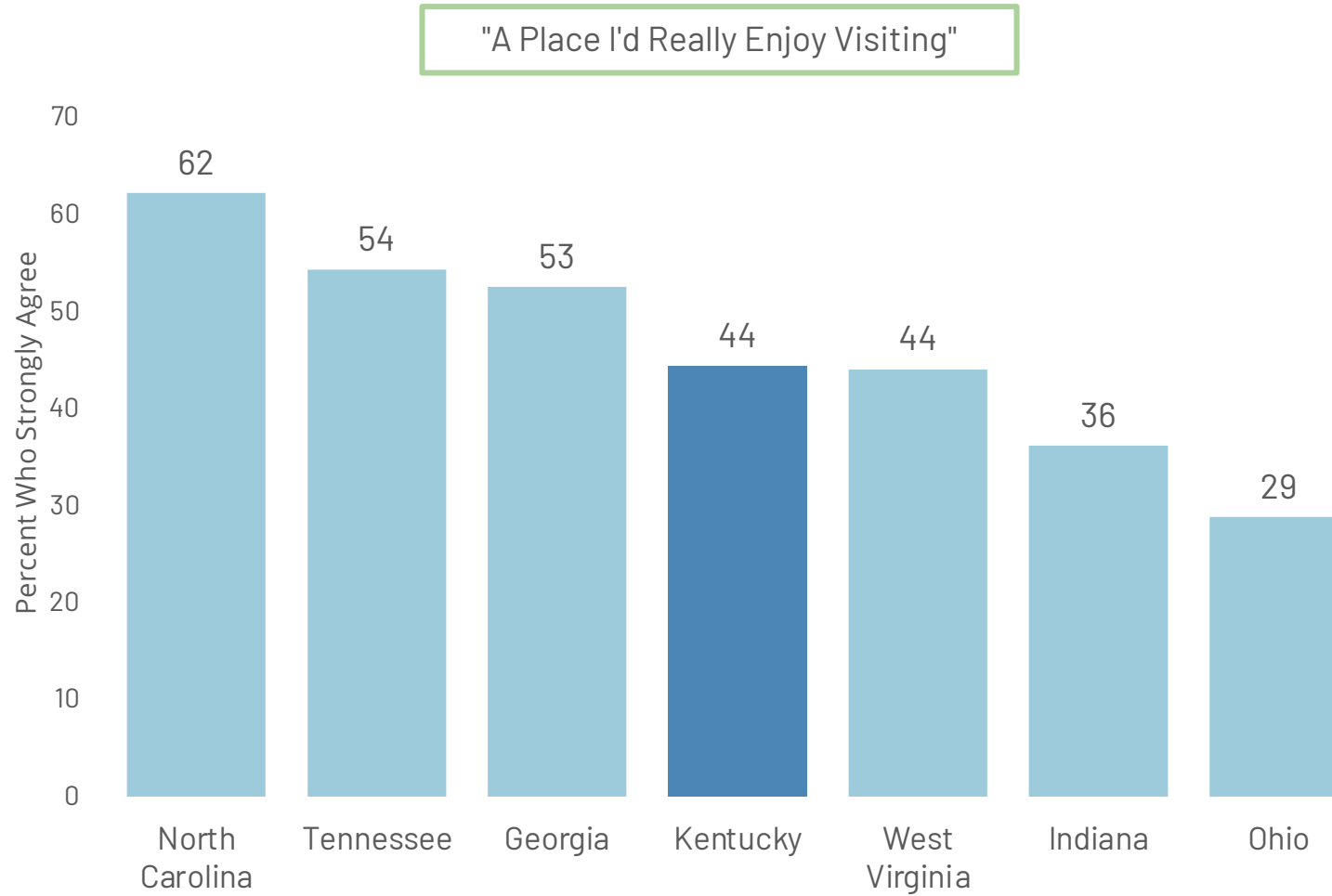


[IMAGE VS. THE COMPETITION]



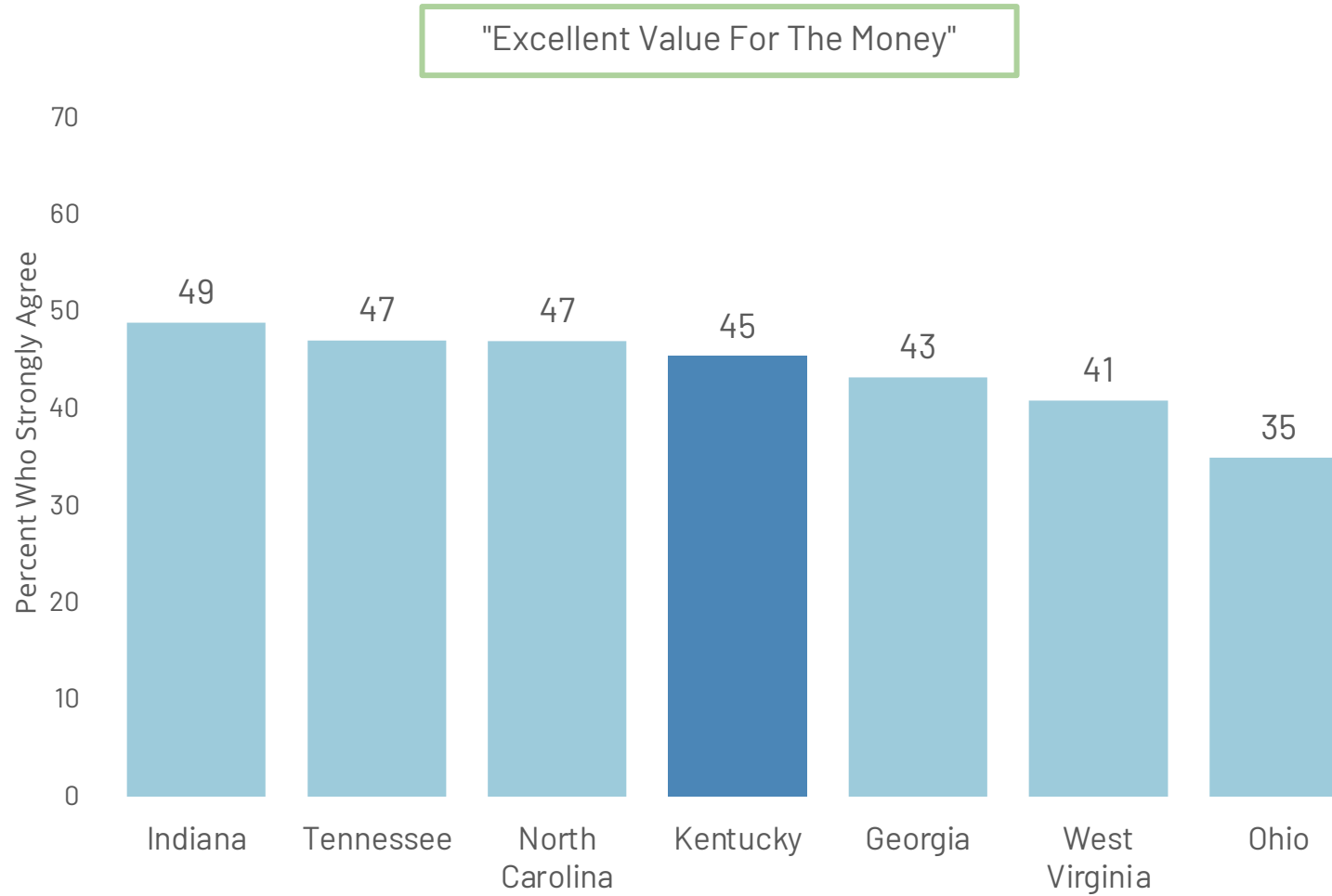
OVERALL IMAGE VS. COMPETITION

Base: New Markets



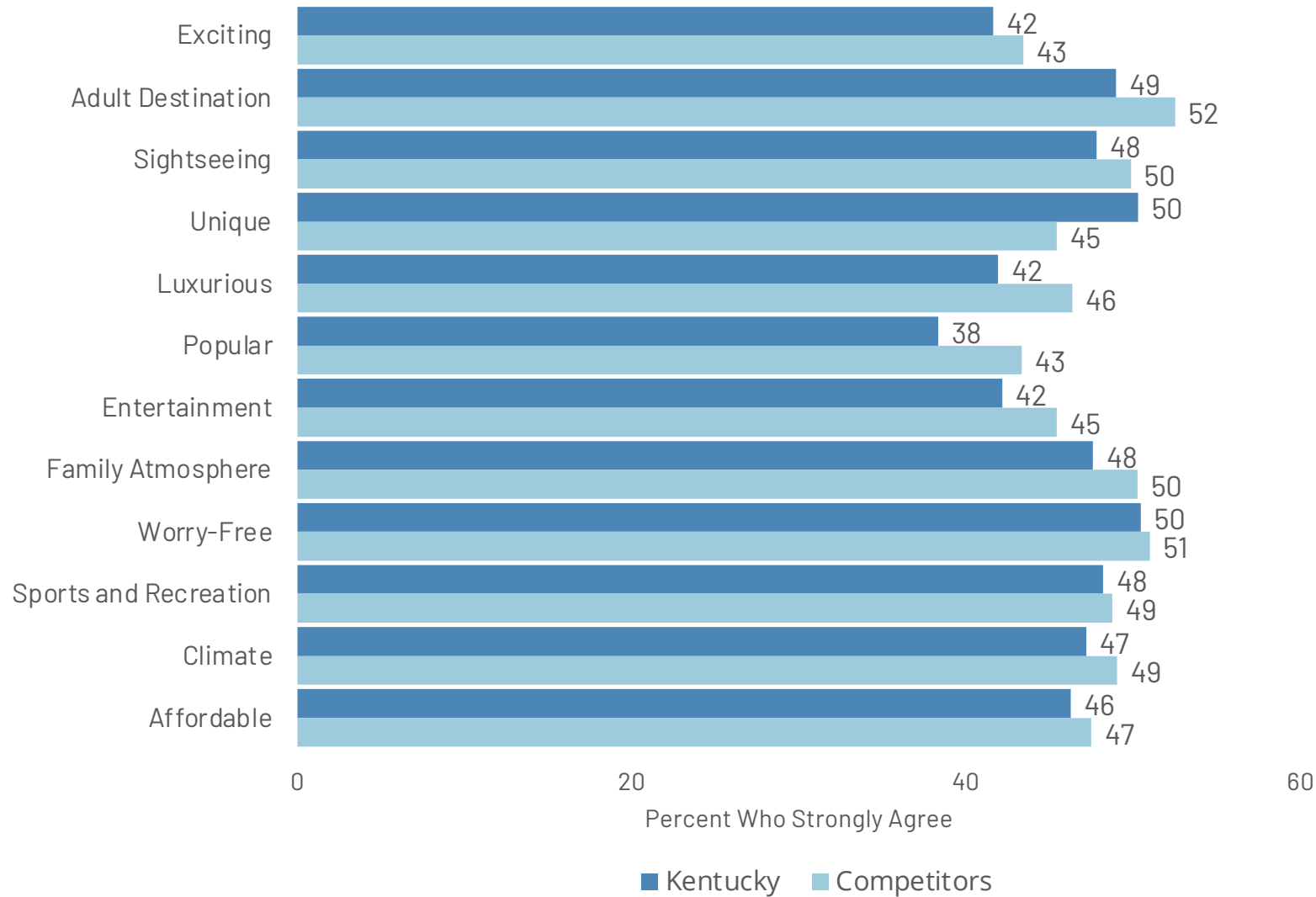
OVERALL IMAGE VS. COMPETITION

Base: New Markets



OVERALL IMAGE VS. COMPETITION

Base: New Markets



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

IMAGE VS. COMPETITION - EXCITING

Base: New Markets



EXCITING

Kentucky*

42

Competitors*

43

Must see destination

38

40

An exciting place

37

41

A fun place

46

47

A real adventure

46

45

Percent Who Strongly Agree

■ Kentucky ■ Competitors

Hot Button

*Percent who strongly agree

IMAGE VS. COMPETITION - EXCITING

Base: New Markets

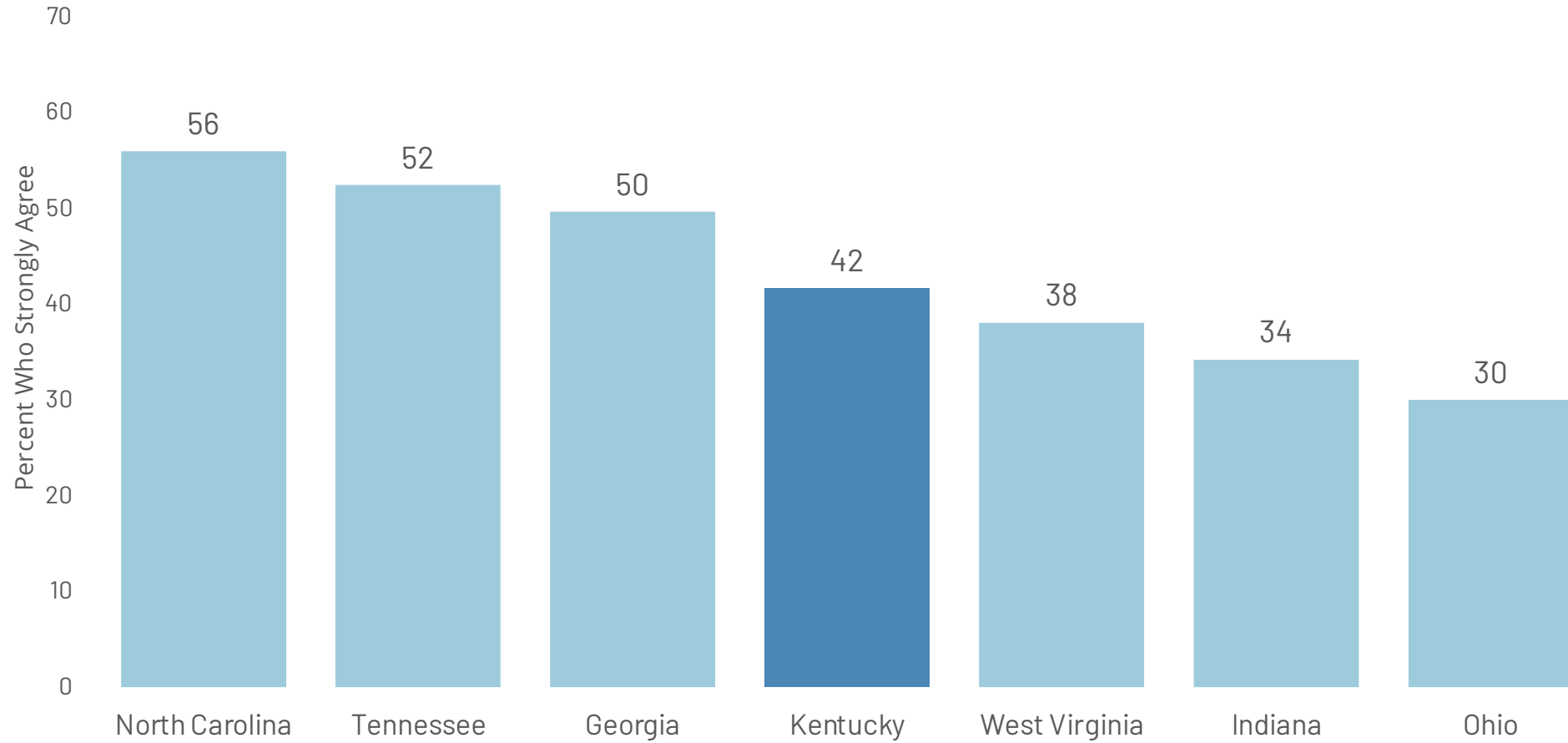


IMAGE VS. COMPETITION - ADULT DESTINATION

Base: New Markets



ADULT DESTINATION

Kentucky*

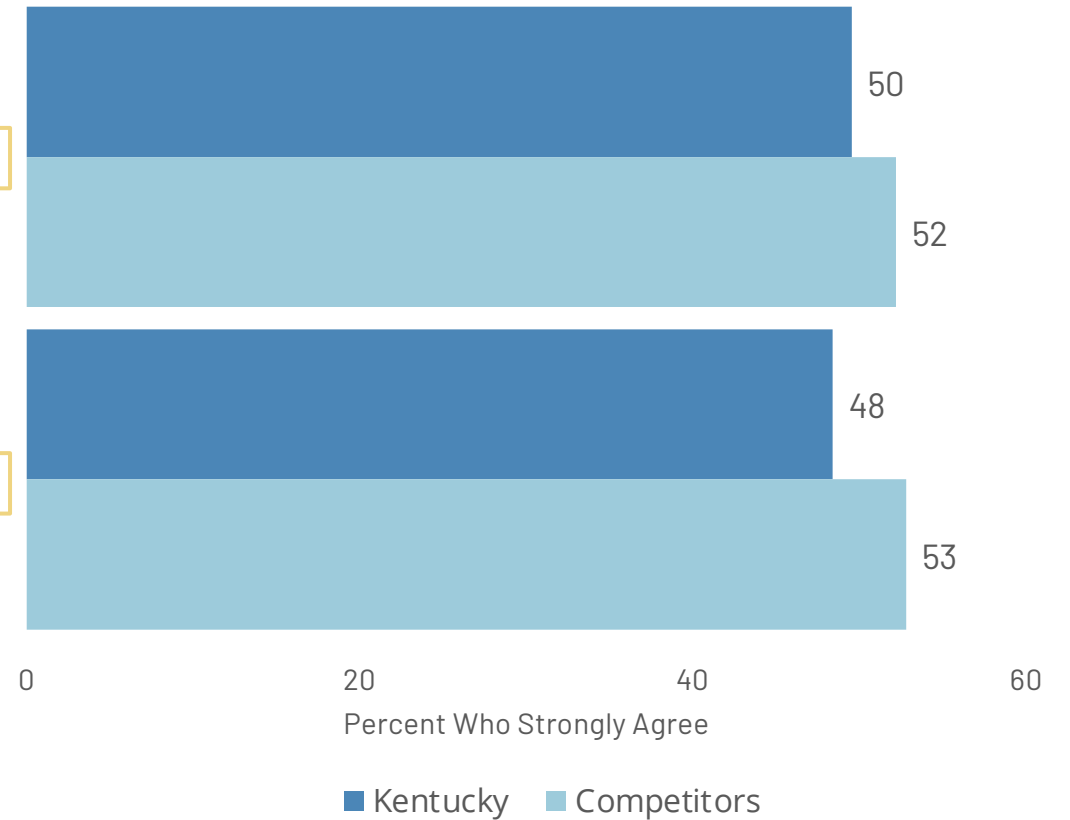
49

Competitors*

52

Good for an adult vacation

Good for couples



Hot Button

*Percent who strongly agree

IMAGE VS. COMPETITION - ADULT DESTINATION

Base: New Markets

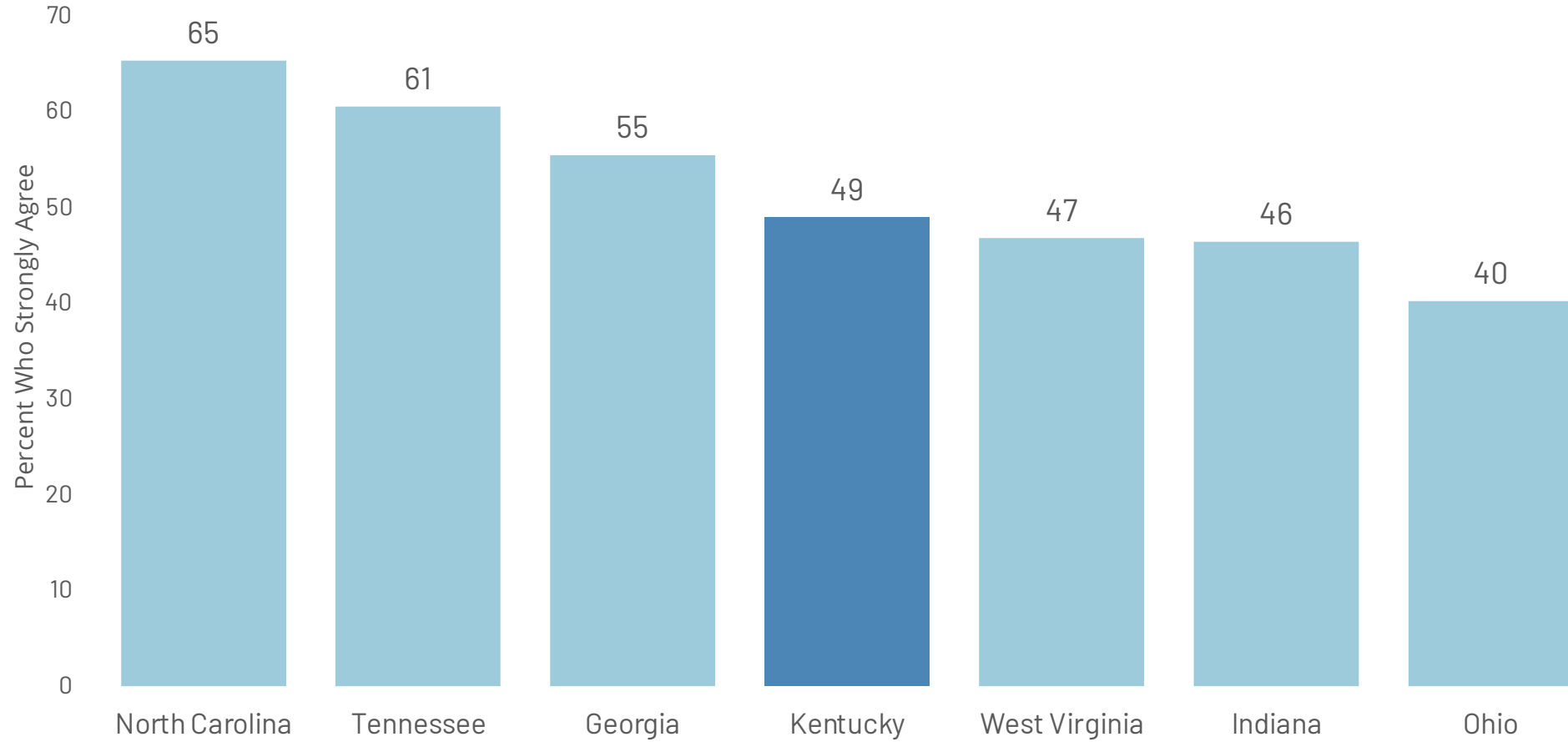
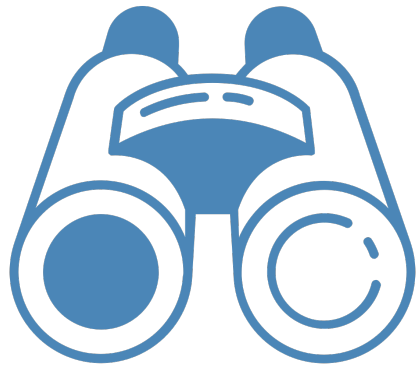


IMAGE VS. COMPETITION - SIGHTSEEING



SIGHTSEEING

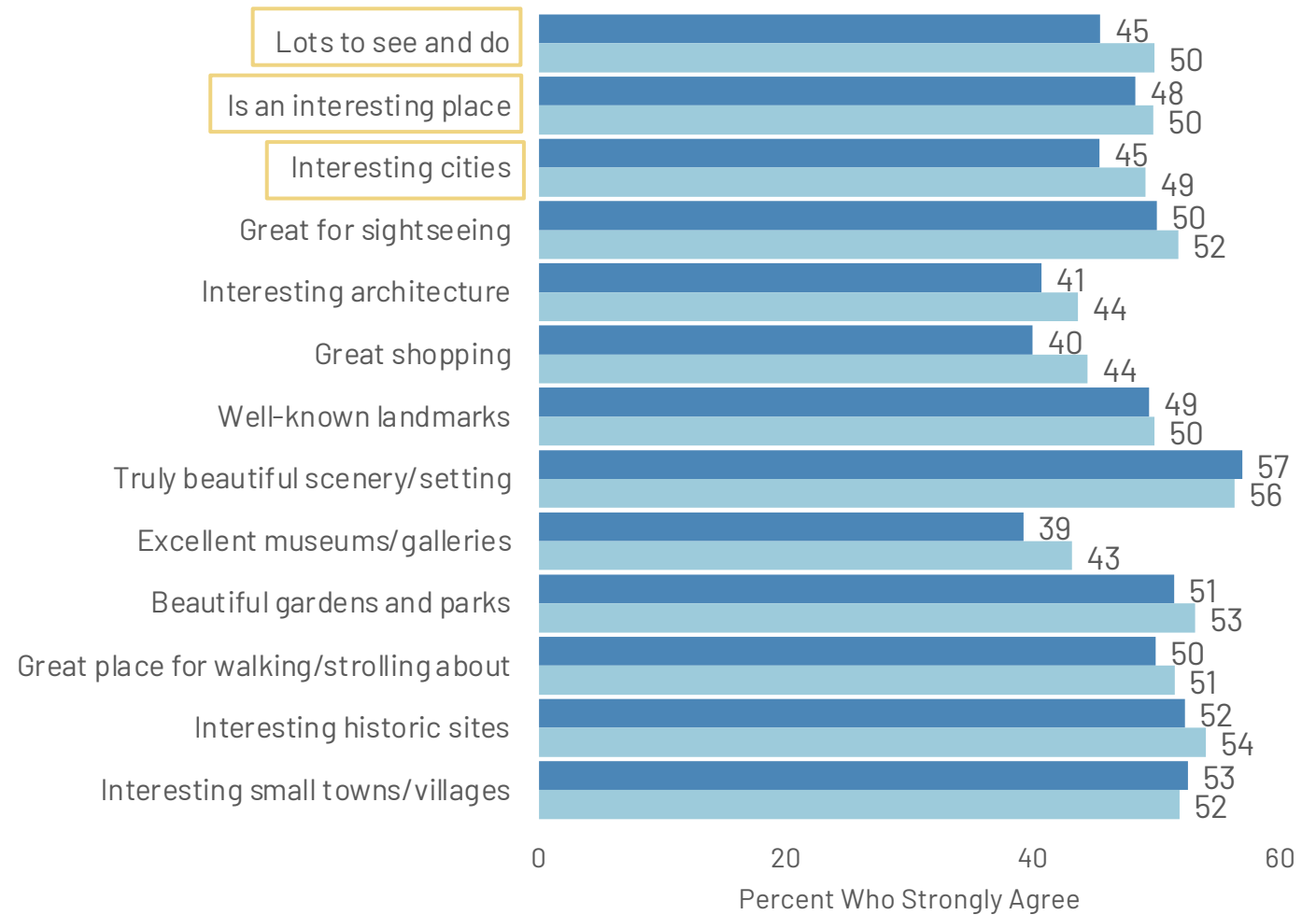
Kentucky*

48

Competitors*

50

Base: New Markets



■ Kentucky ■ Competitors

Hot Button

*Percent who strongly agree

IMAGE VS. COMPETITION - SIGHTSEEING

Base: New Markets

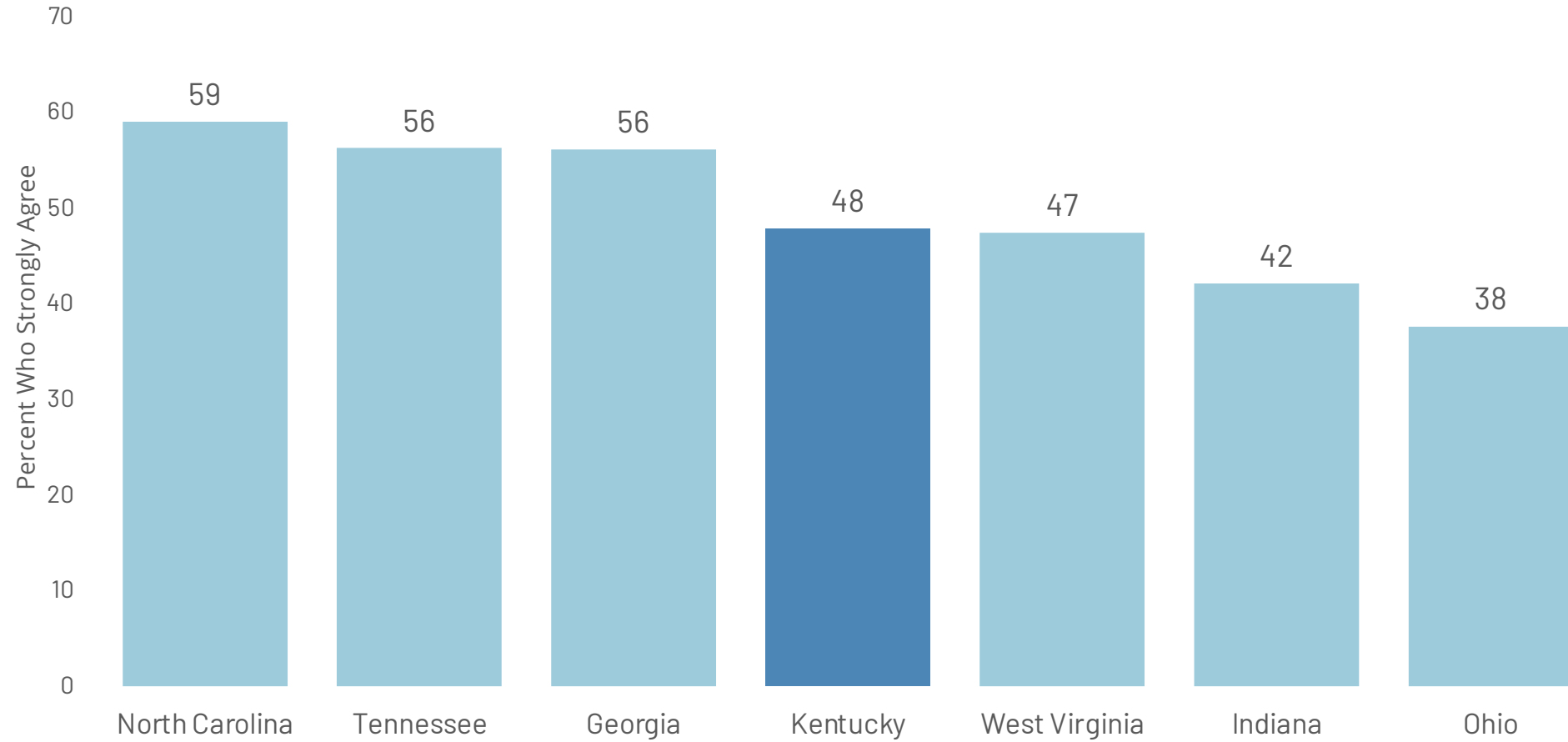
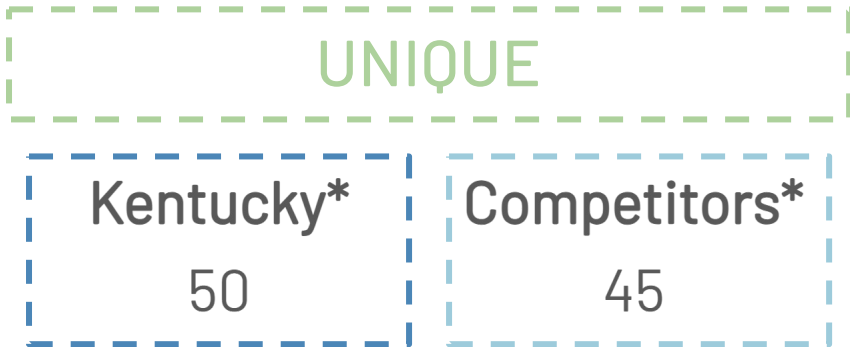
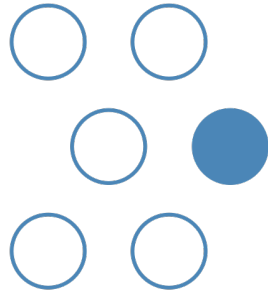
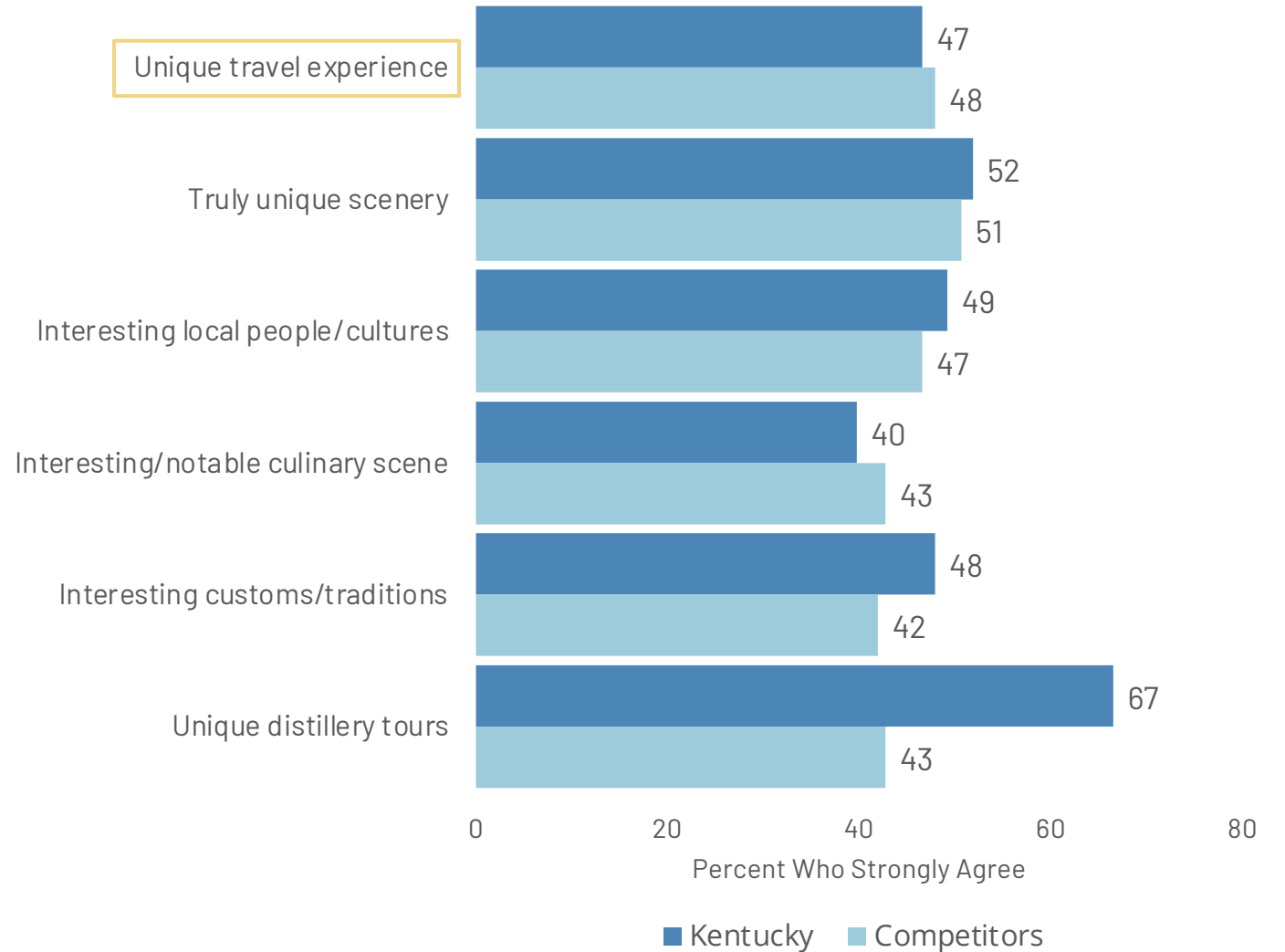


IMAGE VS. COMPETITION - UNIQUE



Base: New Markets



Hot Button

*Percent who strongly agree

IMAGE VS. COMPETITION - UNIQUE

Base: New Markets

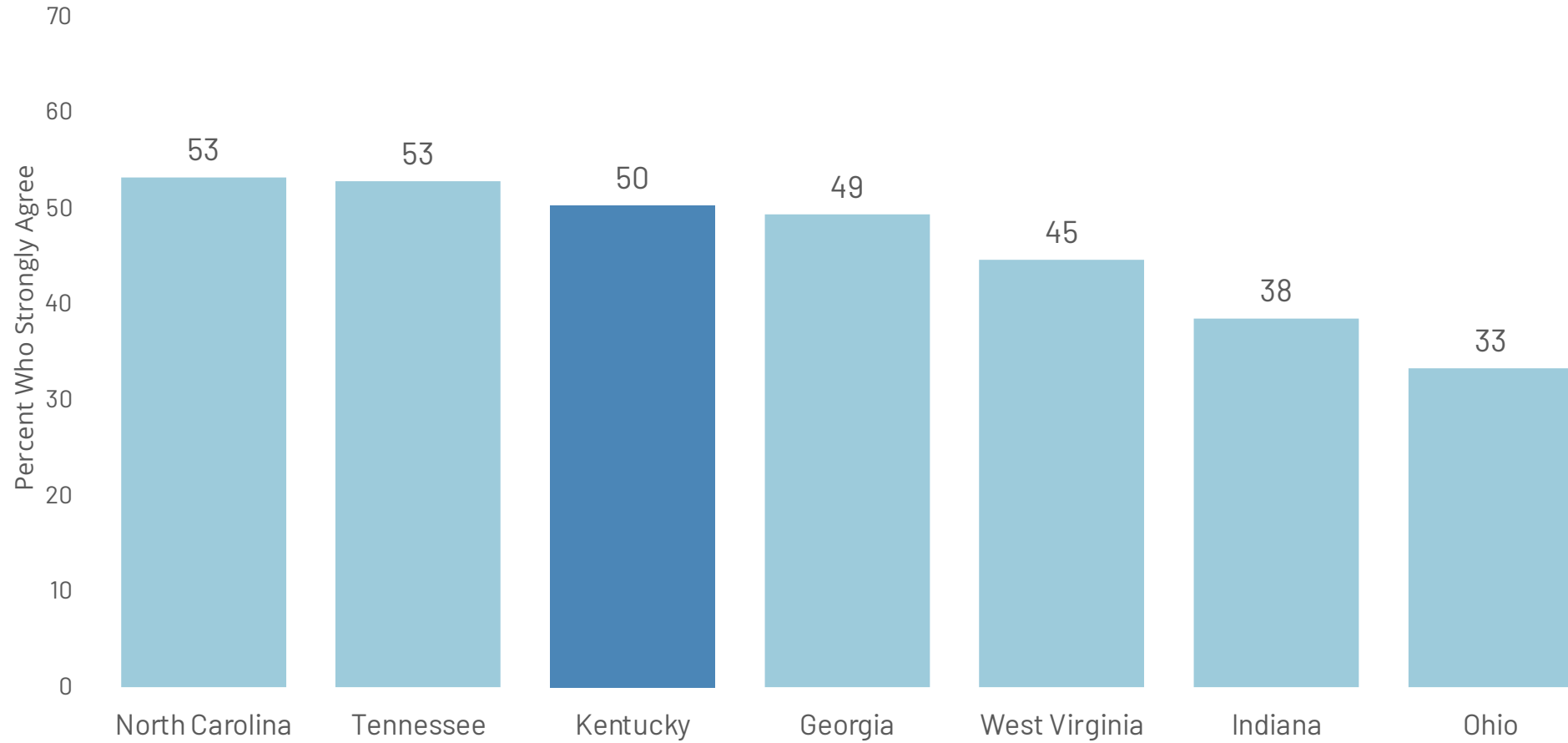
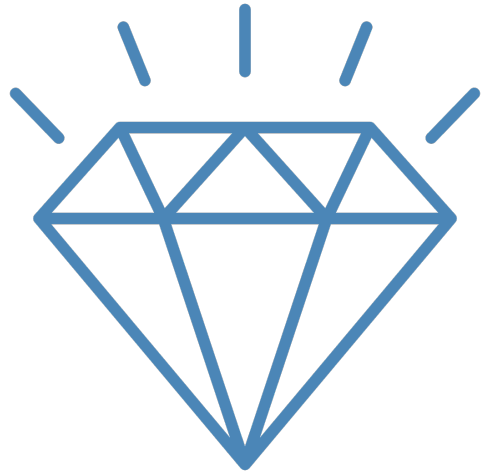


IMAGE VS. COMPETITION - LUXURIOUS



LUXURIOUS

Kentucky*

42

Competitors*

46

*Percent who strongly agree

Base: New Markets

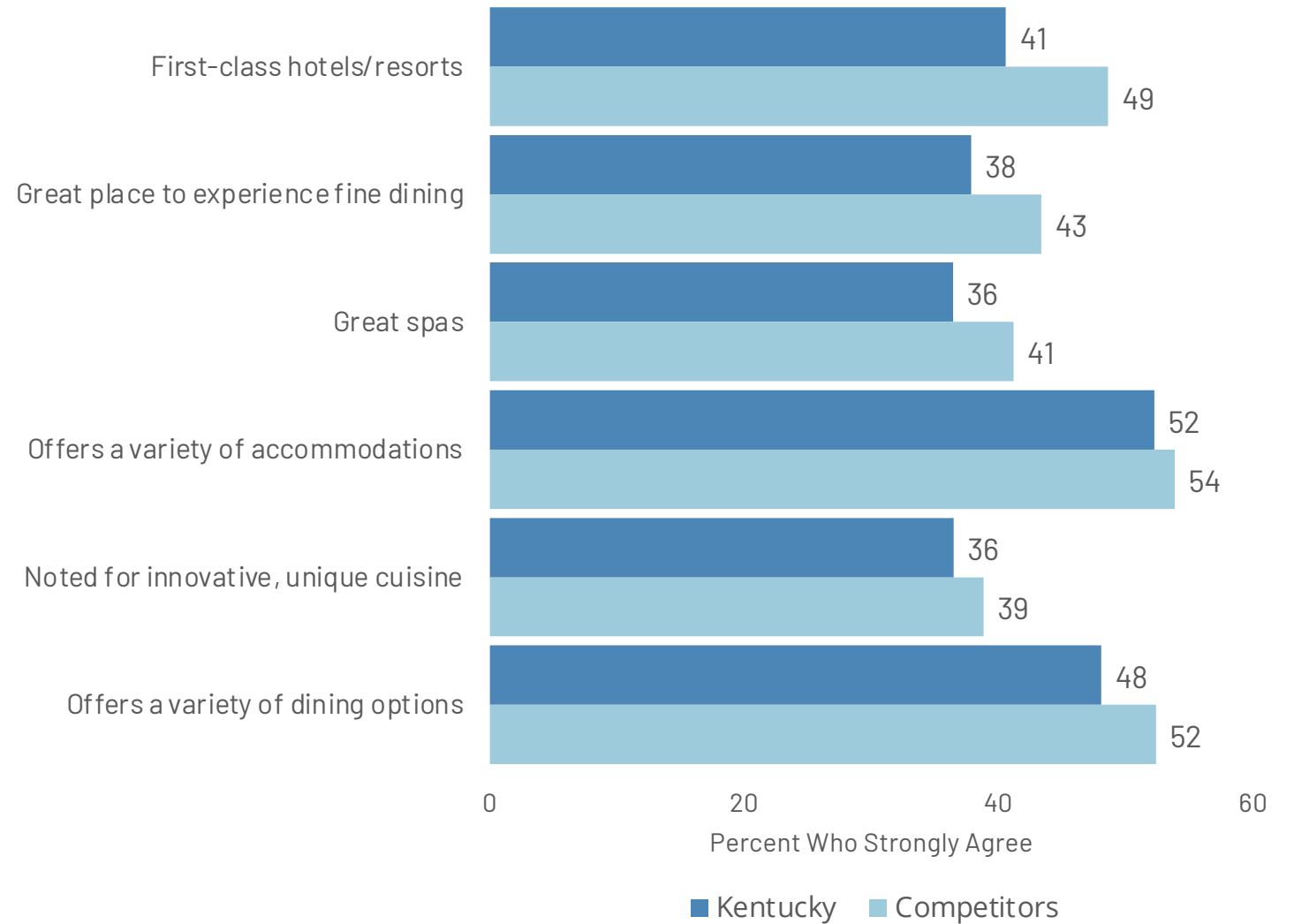


IMAGE VS. COMPETITION - LUXURIOUS

Base: New Markets

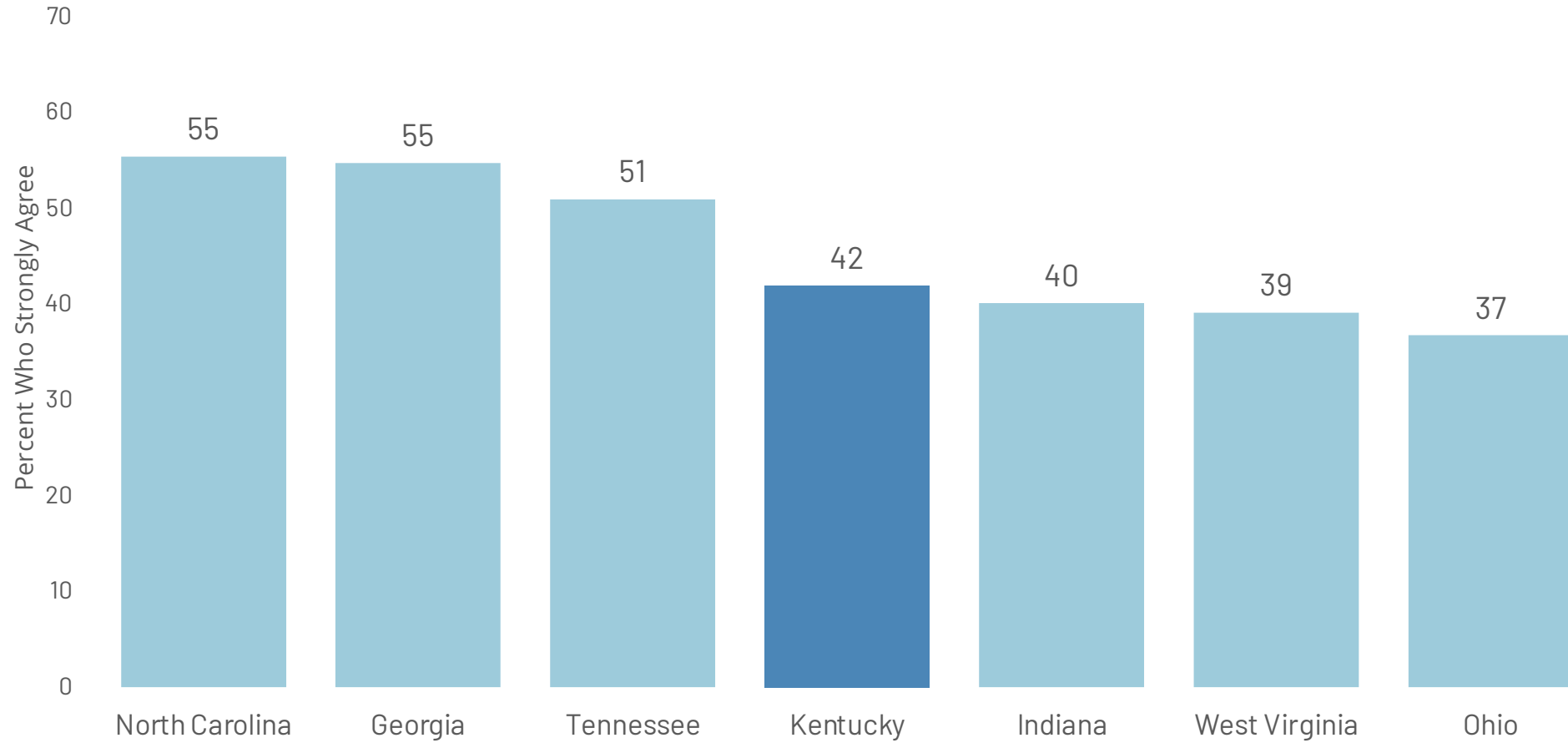
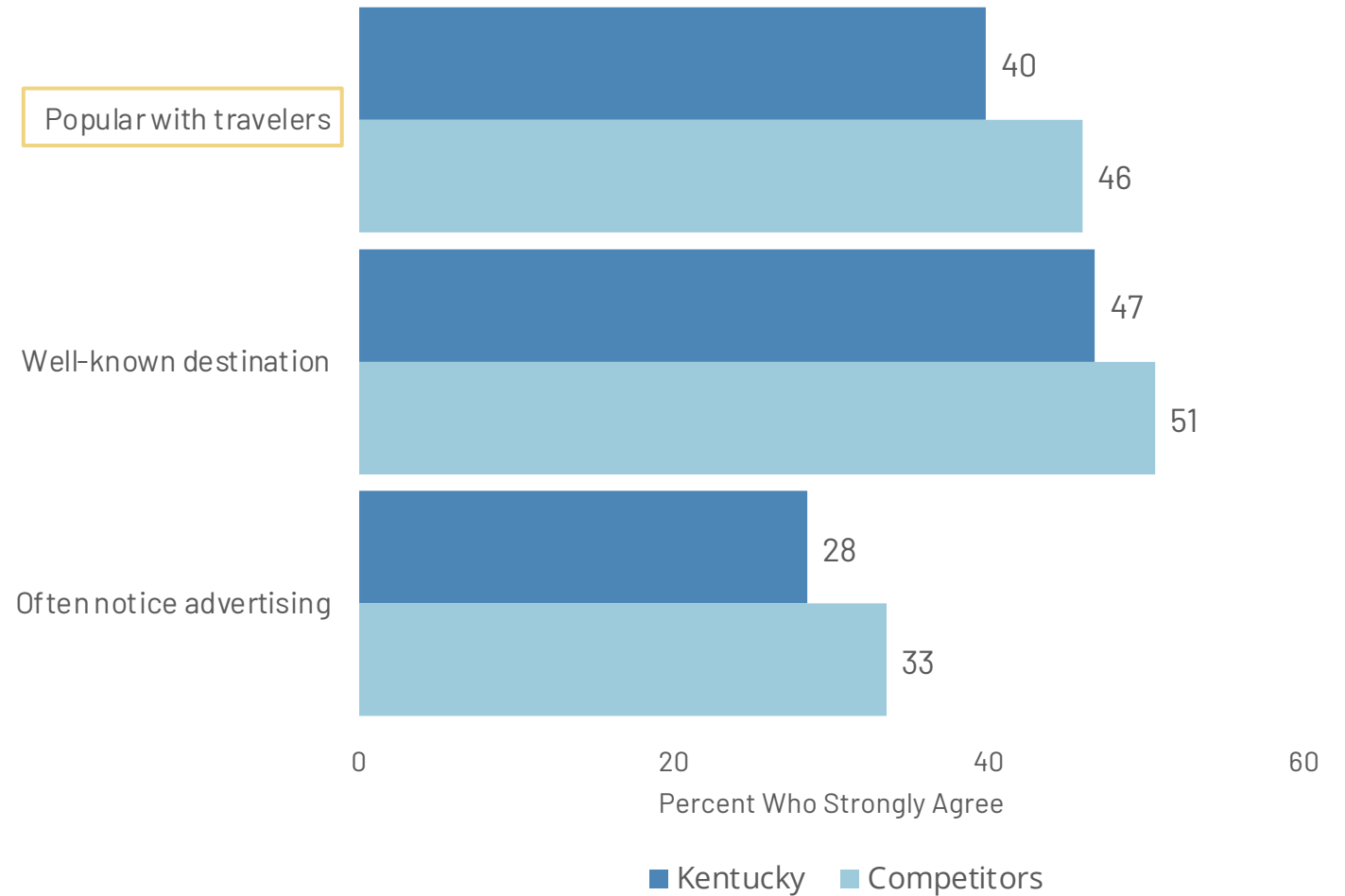
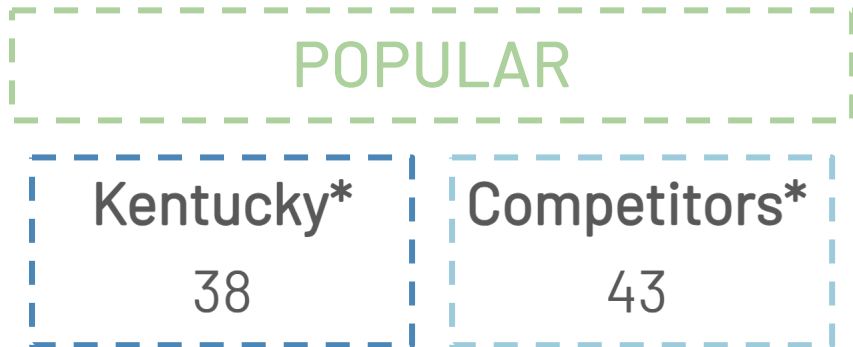


IMAGE VS. COMPETITION - POPULAR

Base: New Markets



Hot Button

*Percent who strongly agree

IMAGE VS. COMPETITION - POPULAR

Base: New Markets

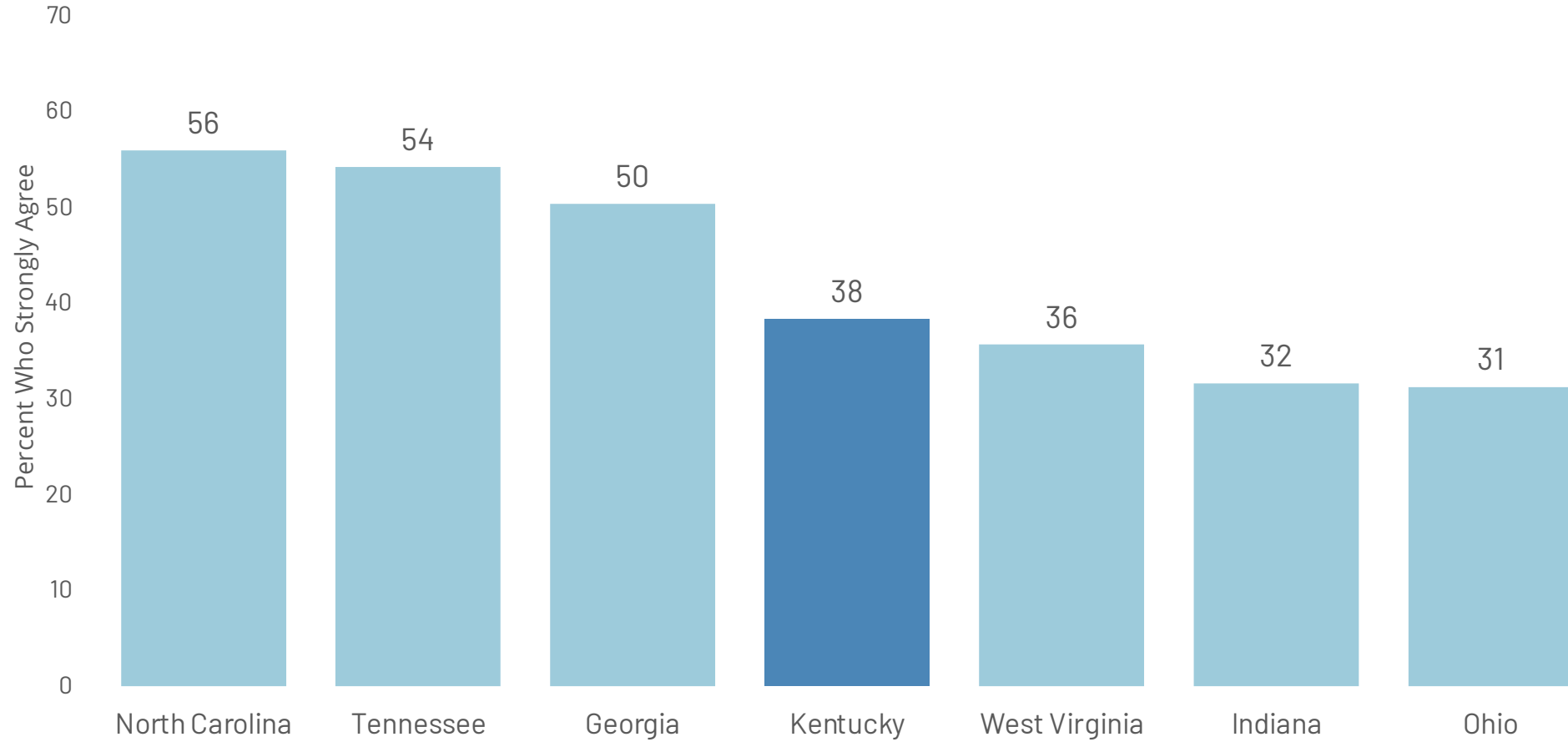


IMAGE VS. COMPETITION - ENTERTAINMENT

Base: New Markets



ENTERTAINMENT

Kentucky*

42

Competitors*

45

*Percent who strongly agree

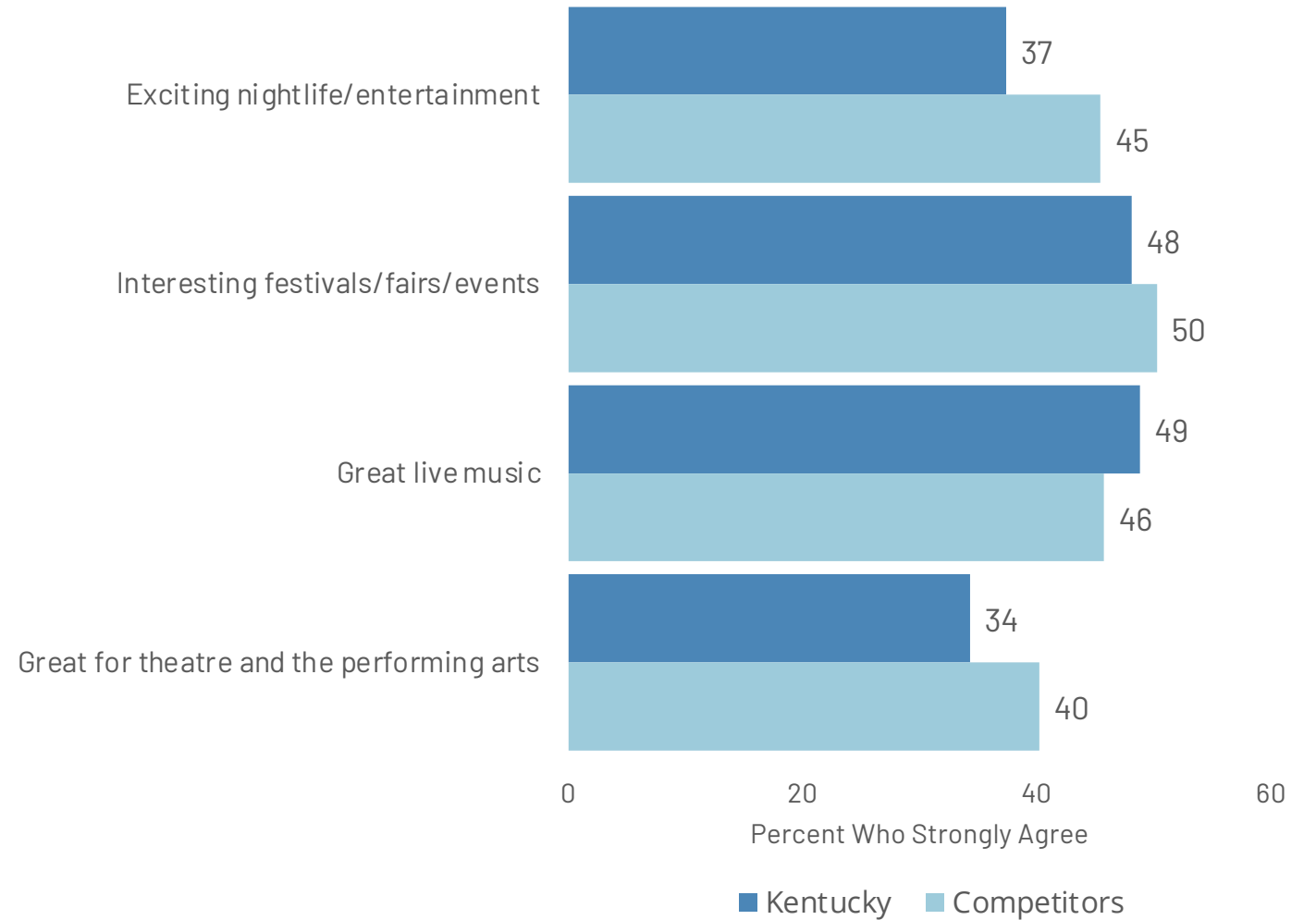


IMAGE VS. COMPETITION - ENTERTAINMENT

Base: New Markets

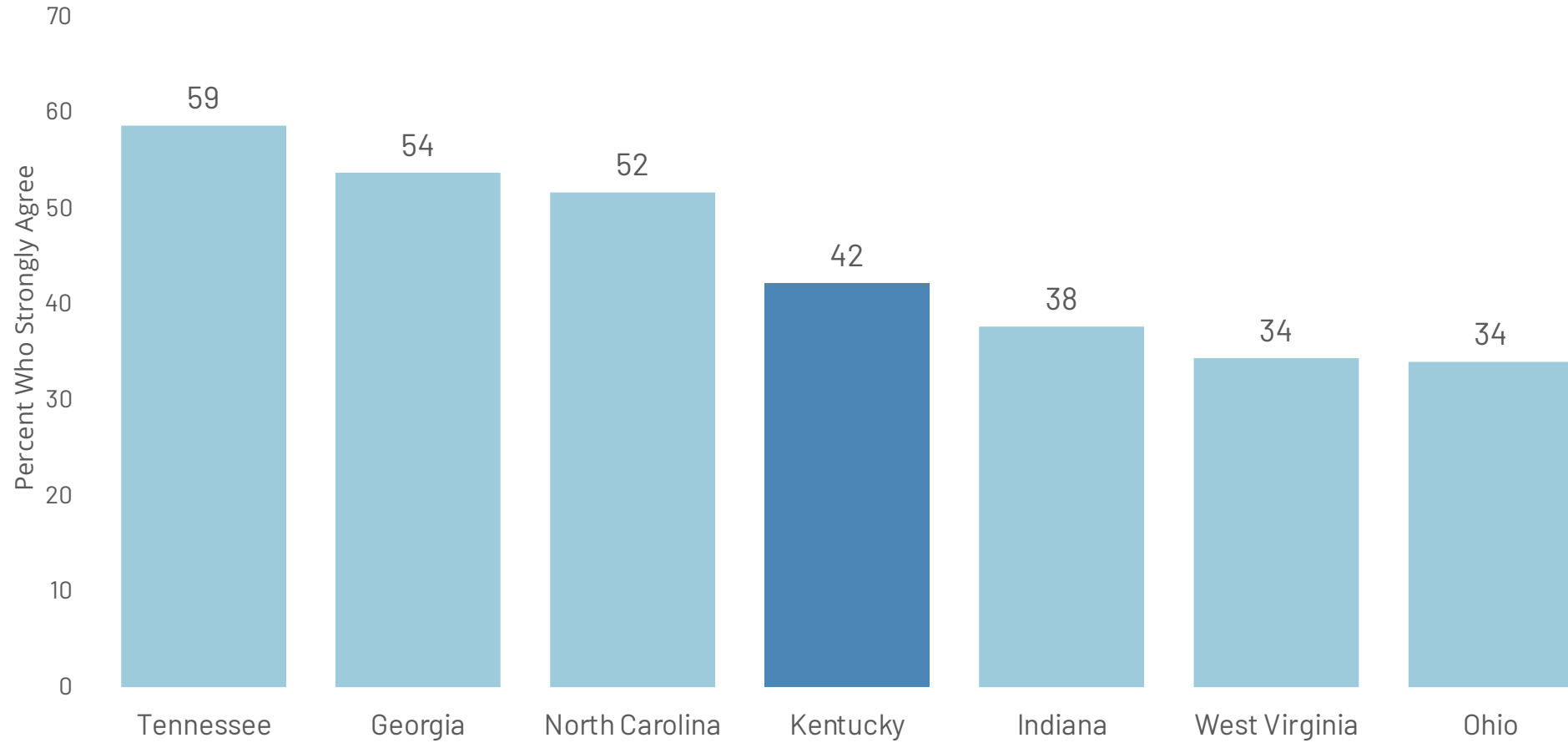


IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

Base: New Markets



FAMILY ATMOSPHERE

Kentucky*

48

Competitors*

50

*Percent who strongly agree

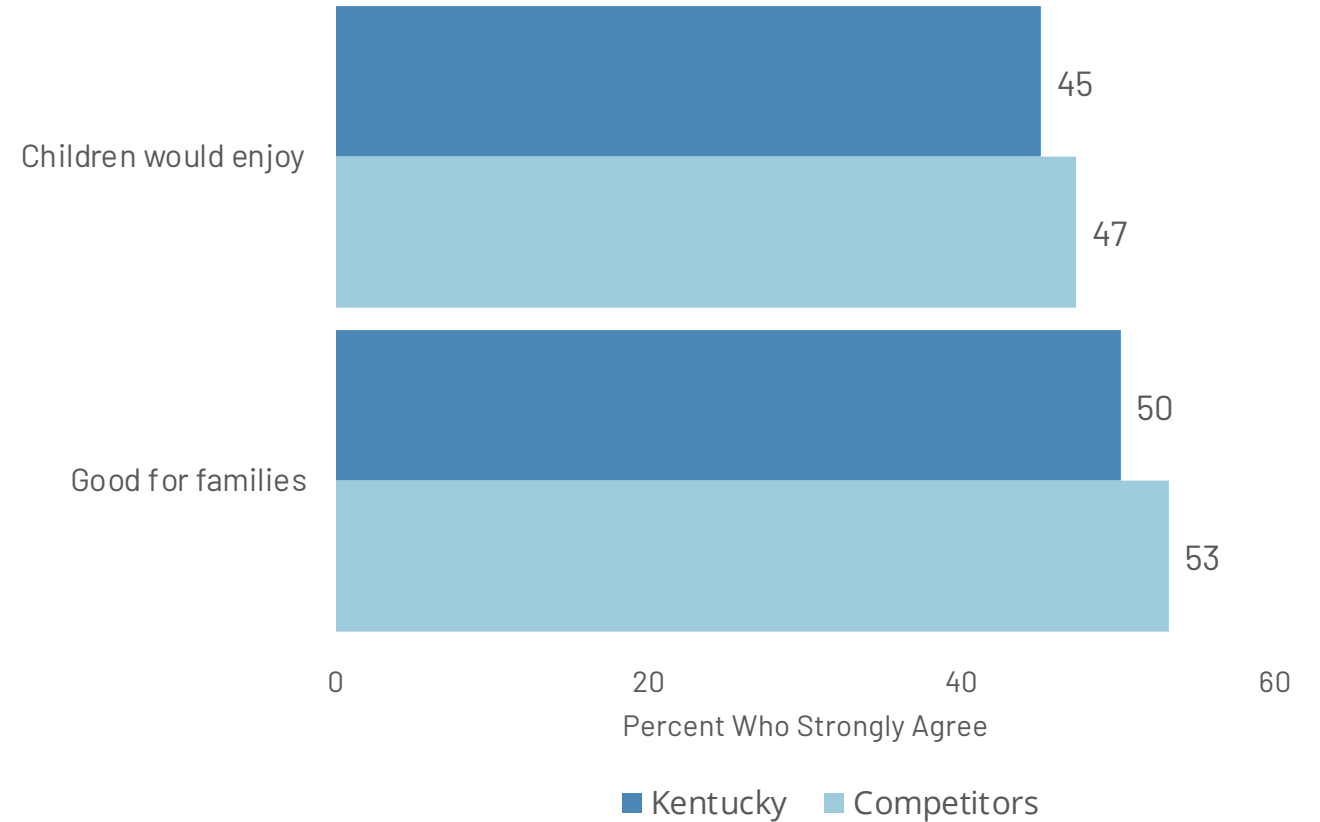


IMAGE VS. COMPETITION - FAMILY ATMOSPHERE

Base: New Markets

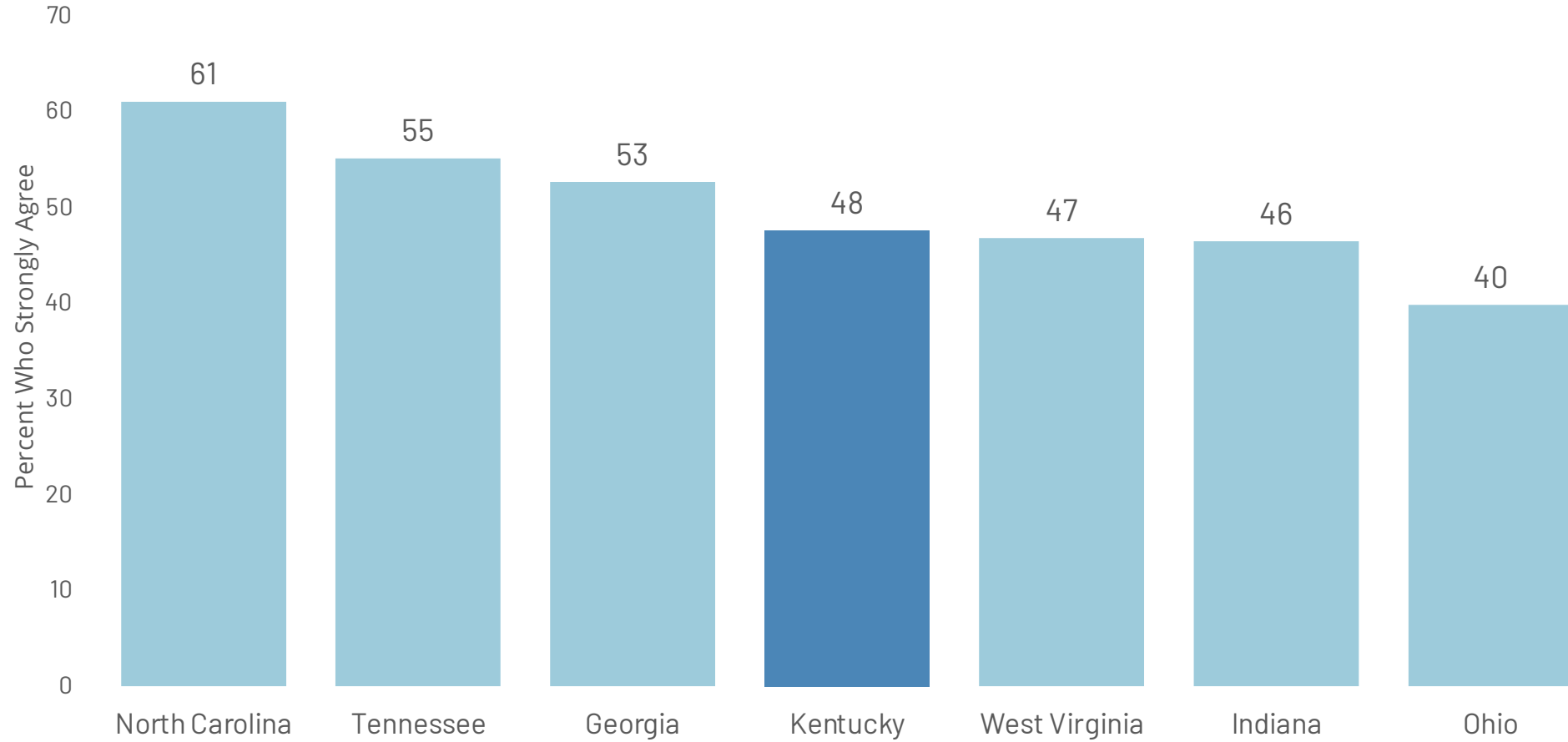


IMAGE VS. COMPETITION - WORRY-FREE

Base: New Markets



WORRY-FREE

Kentucky*

50

Competitors*

51

*Percent who strongly agree

Good place to relax/escape from hectic life

A place I would feel welcome

Warm, friendly people

Safe in tourist areas

Getting around the state is easy

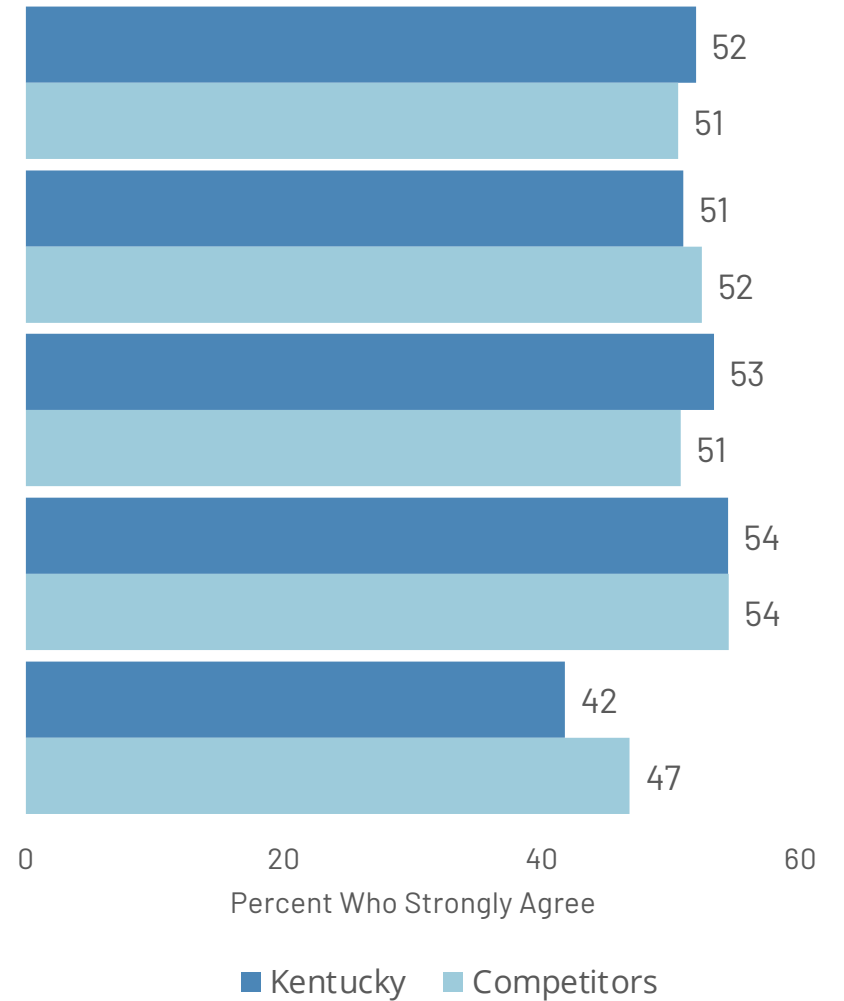


IMAGE VS. COMPETITION - WORRY-FREE

Base: New Markets

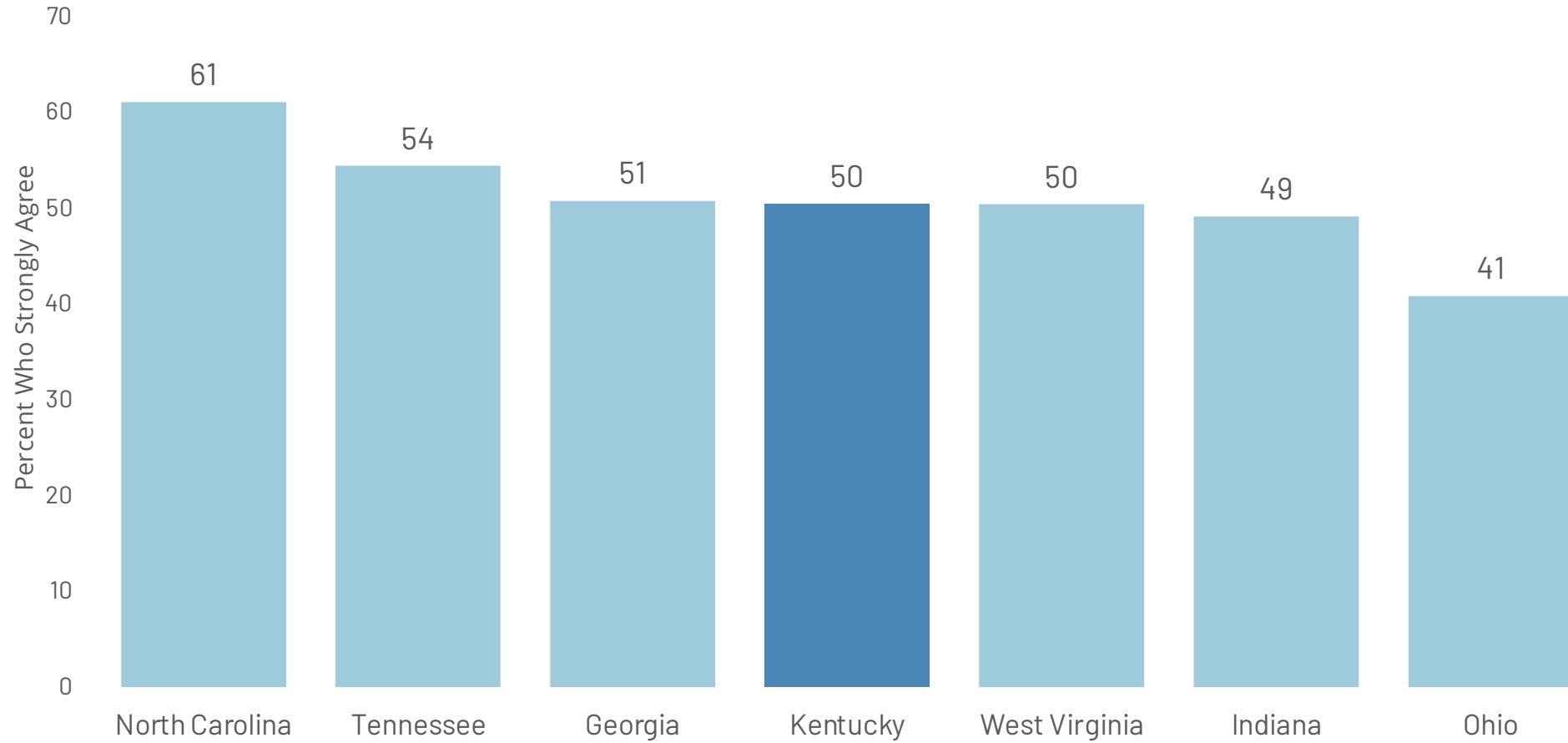


IMAGE VS. COMPETITION - SPORTS AND RECREATION

Base: New Markets



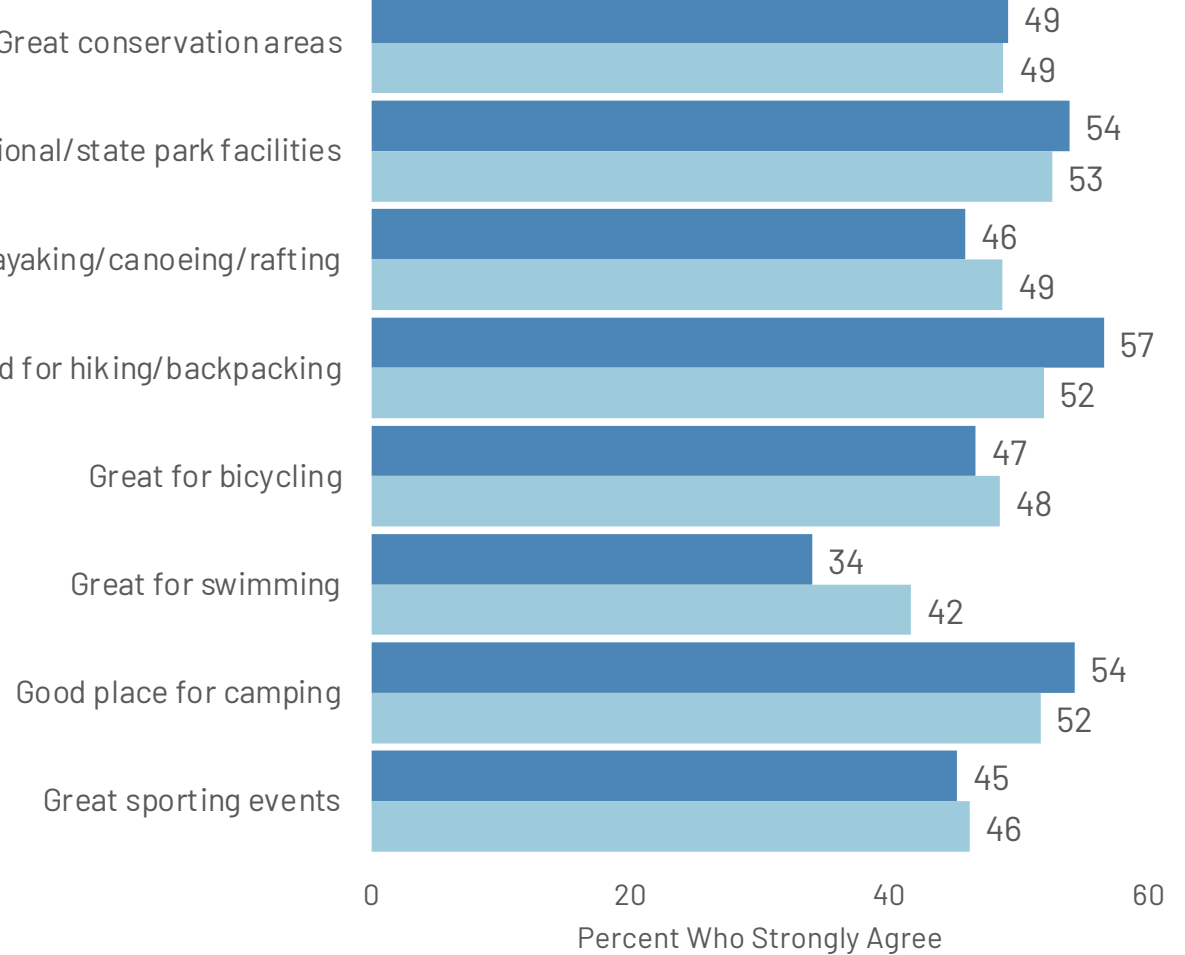
SPORTS AND RECREATION

Kentucky*

48

Competitors*

49



■ Kentucky ■ Competitors

*Percent who strongly agree

IMAGE VS. COMPETITION - SPORTS AND RECREATION

Base: New Markets

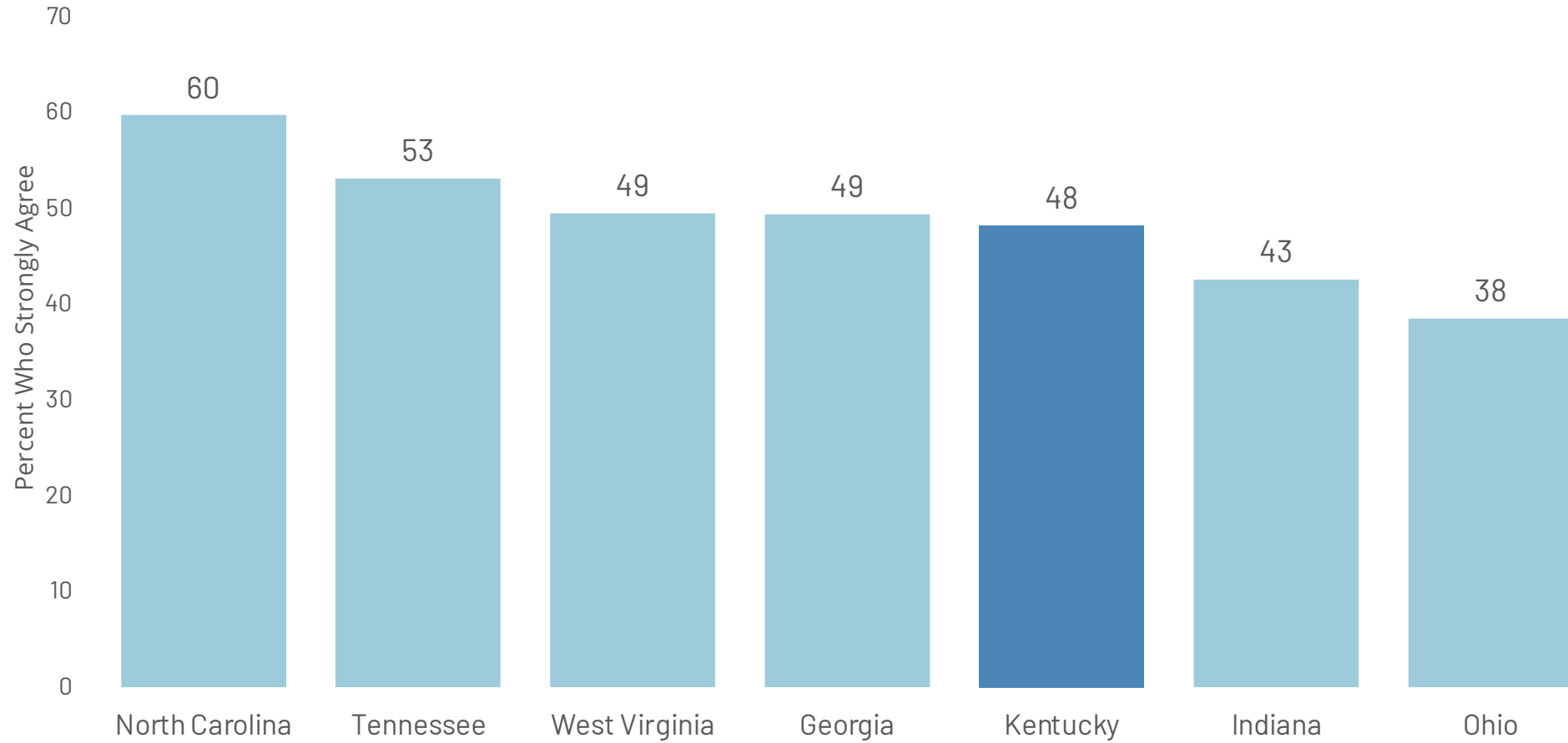
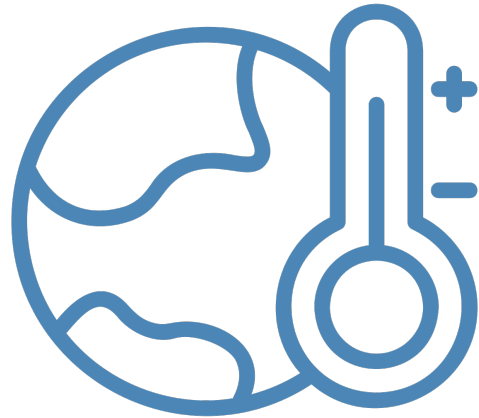


IMAGE VS. COMPETITION - CLIMATE



CLIMATE

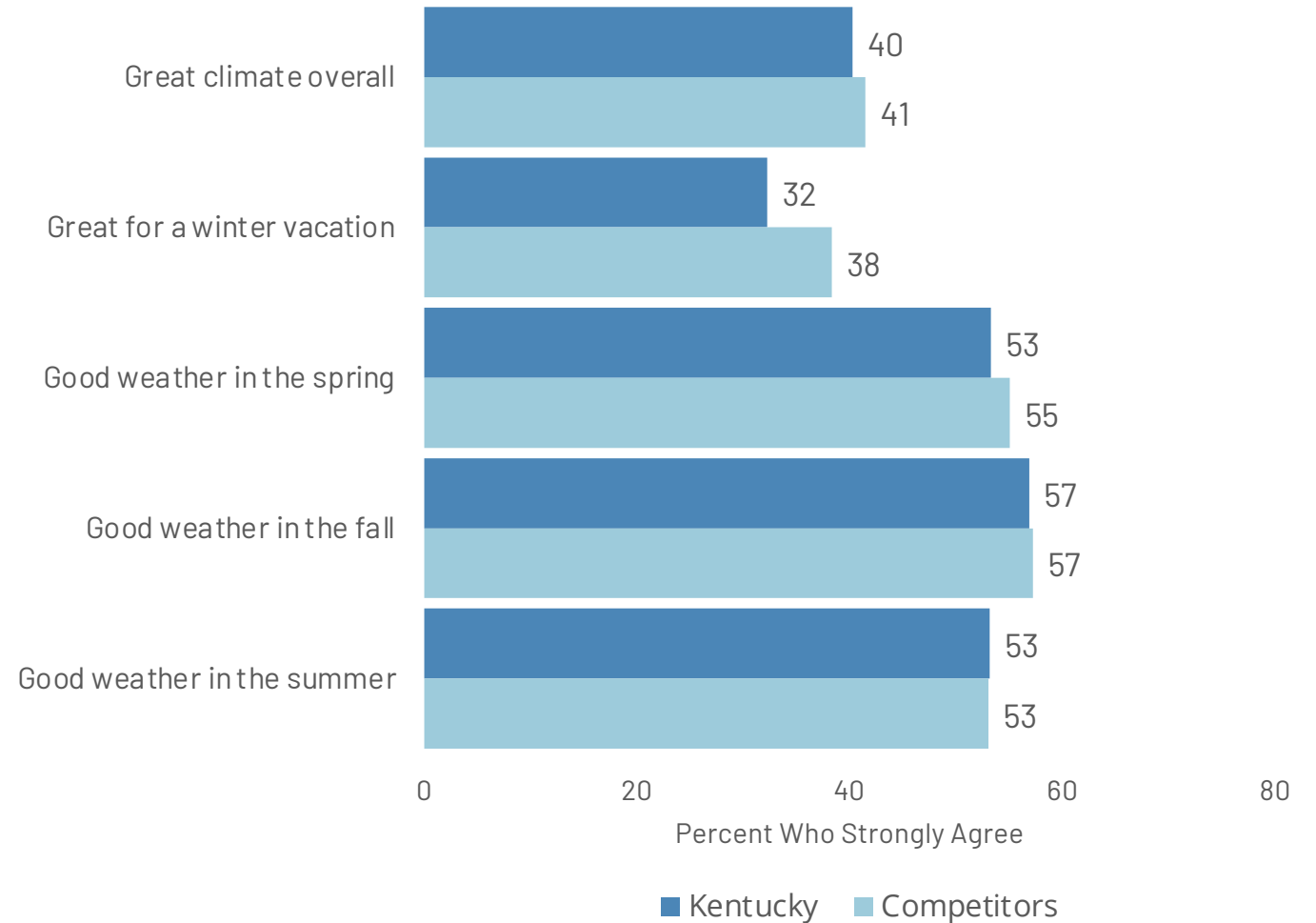
Kentucky*

47

Competitors*

49

Base: New Markets



*Percent who strongly agree

IMAGE VS. COMPETITION - CLIMATE

Base: New Markets

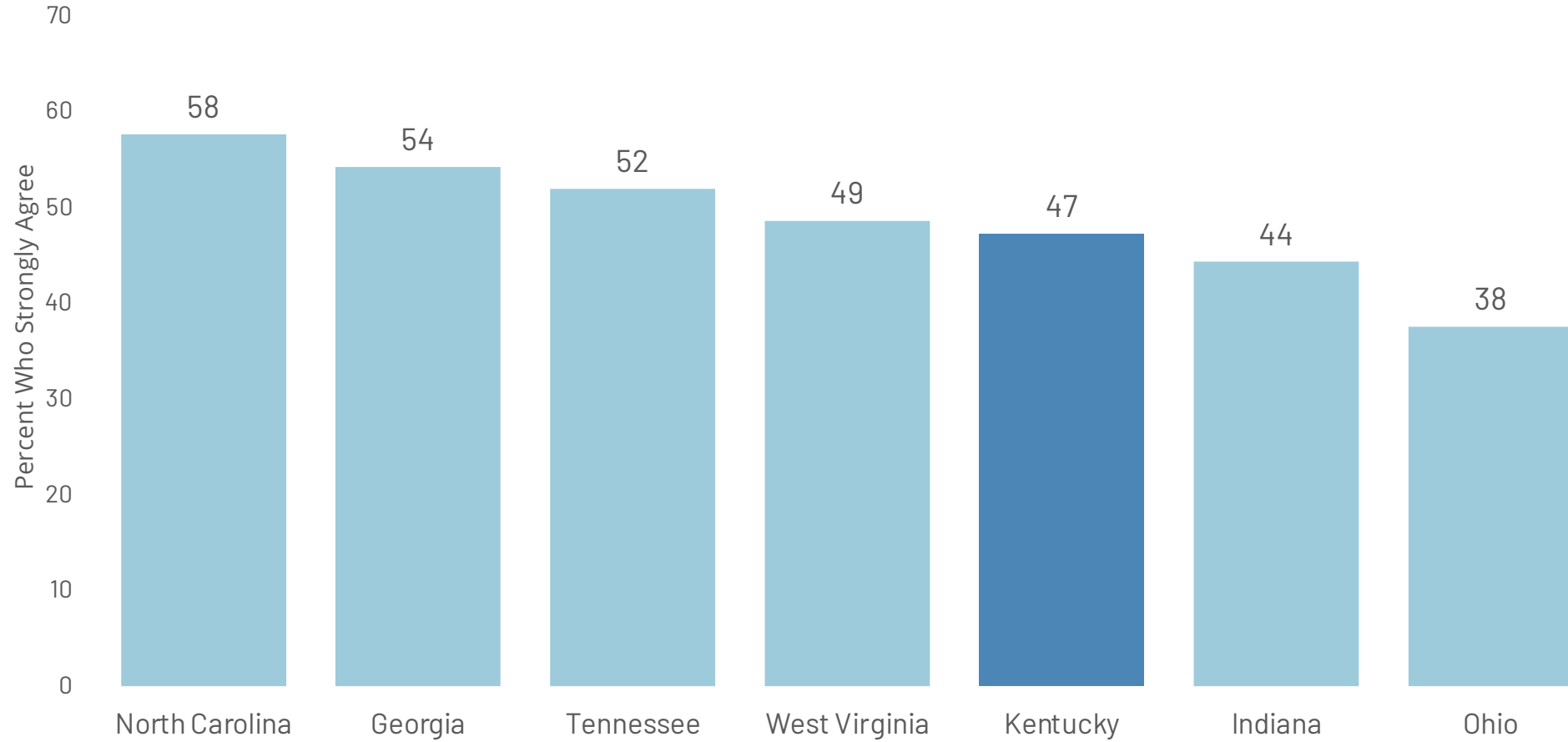


IMAGE VS. COMPETITION - AFFORDABLE



AFFORDABLE

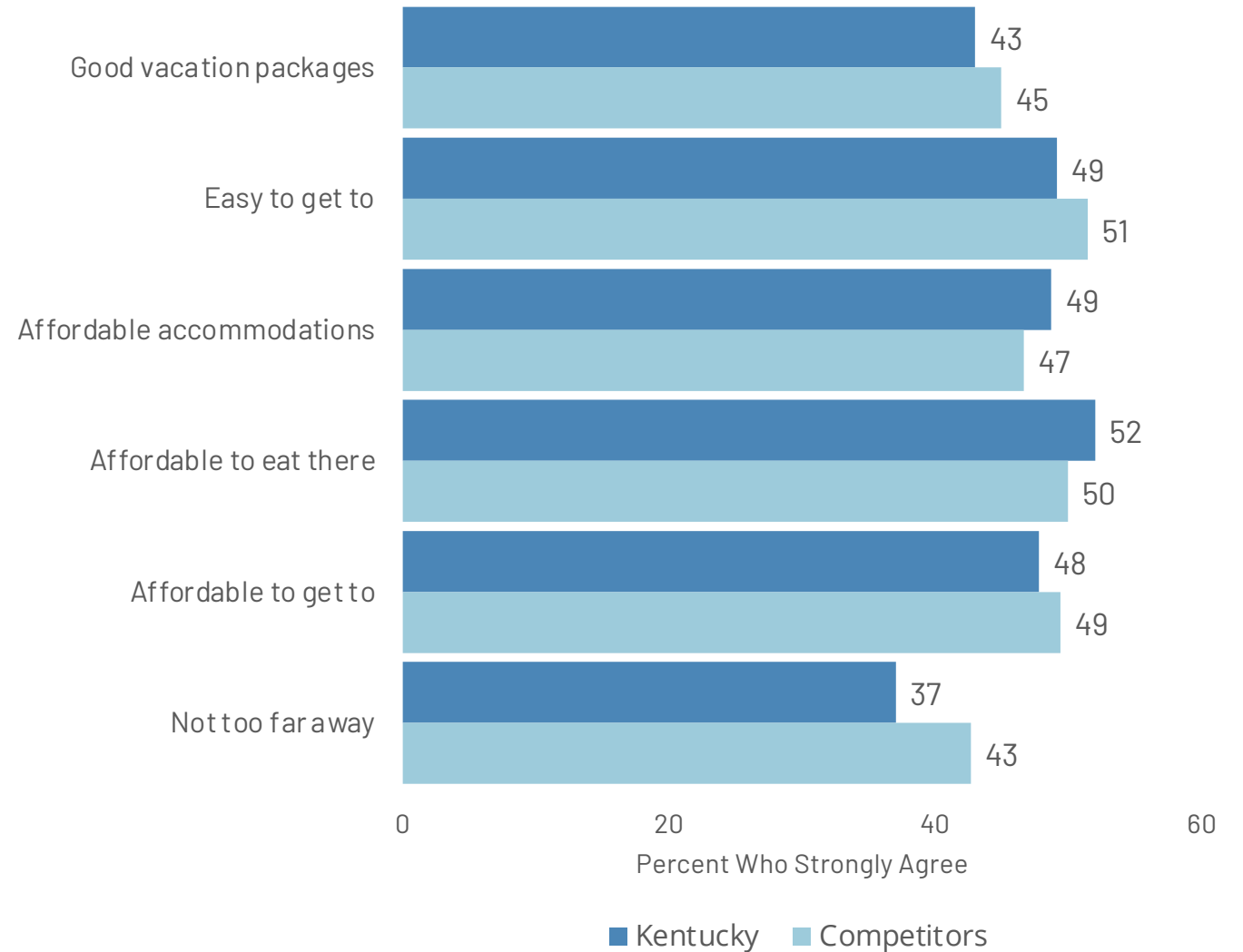
Kentucky*

46

Competitors*

47

Base: New Markets



*Percent who strongly agree

IMAGE VS. COMPETITION - AFFORDABLE

Base: New Markets

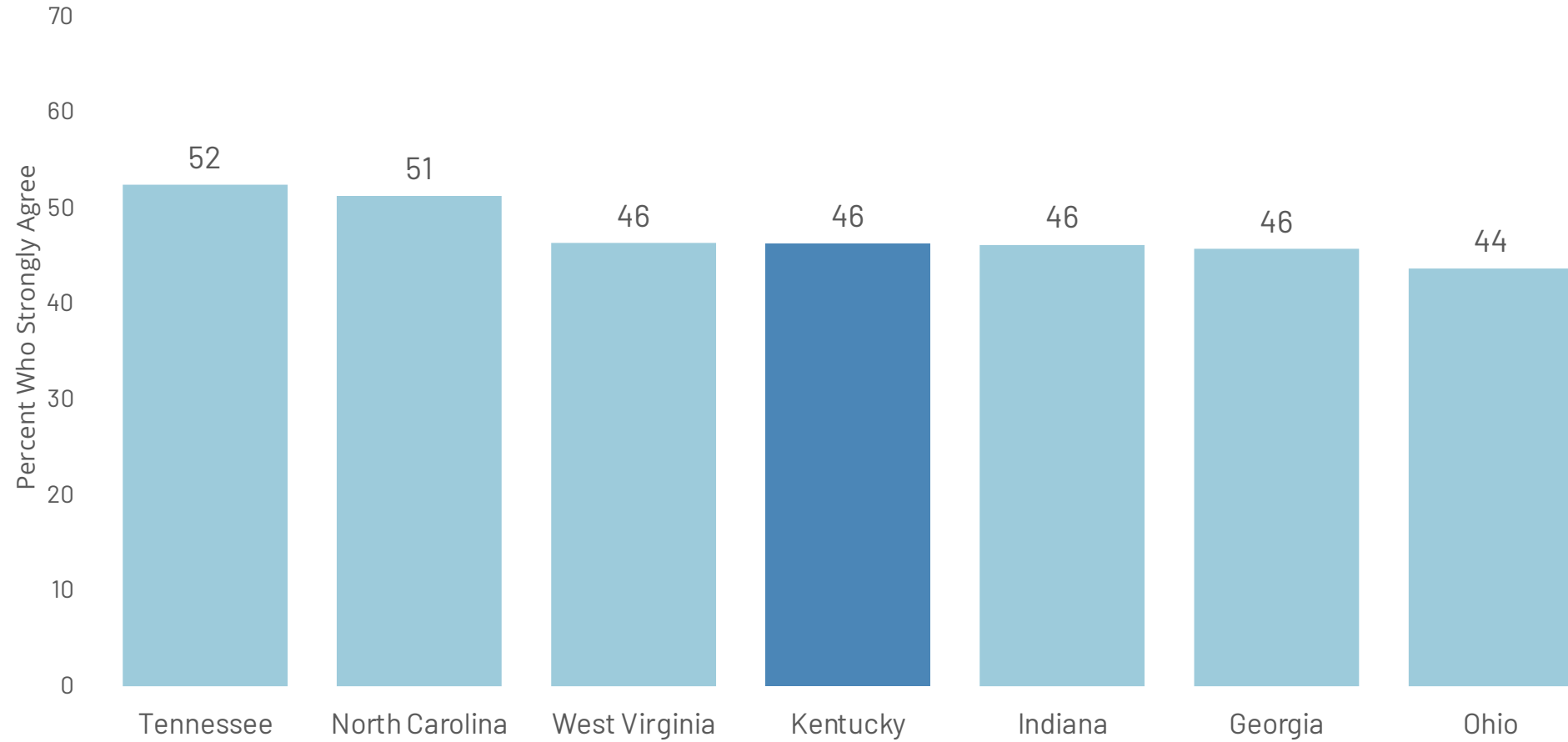


IMAGE STRENGTHS VS. COMPETITION

Base: New Markets

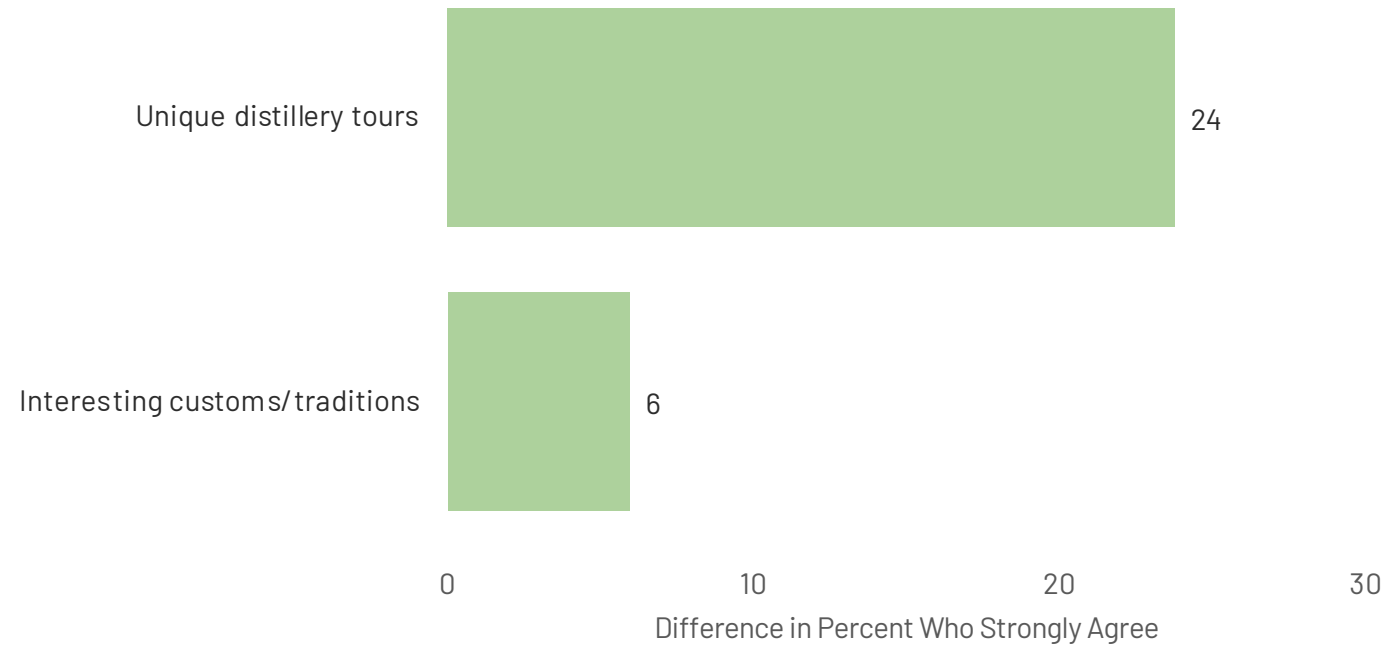
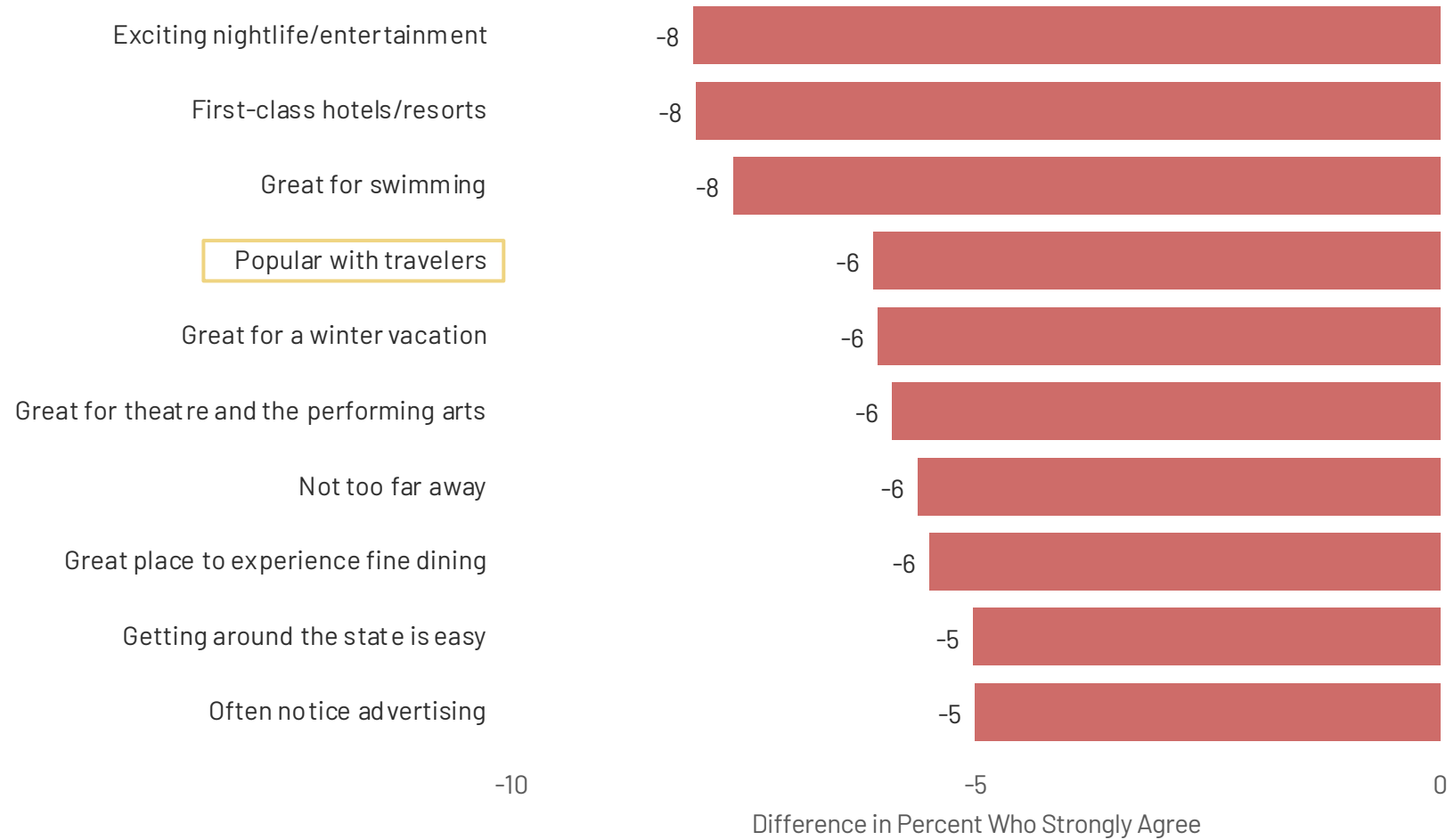


IMAGE WEAKNESSES VS. COMPETITION

Base: New Markets



Hot Button



"HALO EFFECT" ON
ECONOMIC DEVELOPMENT



THE "HALO EFFECT"

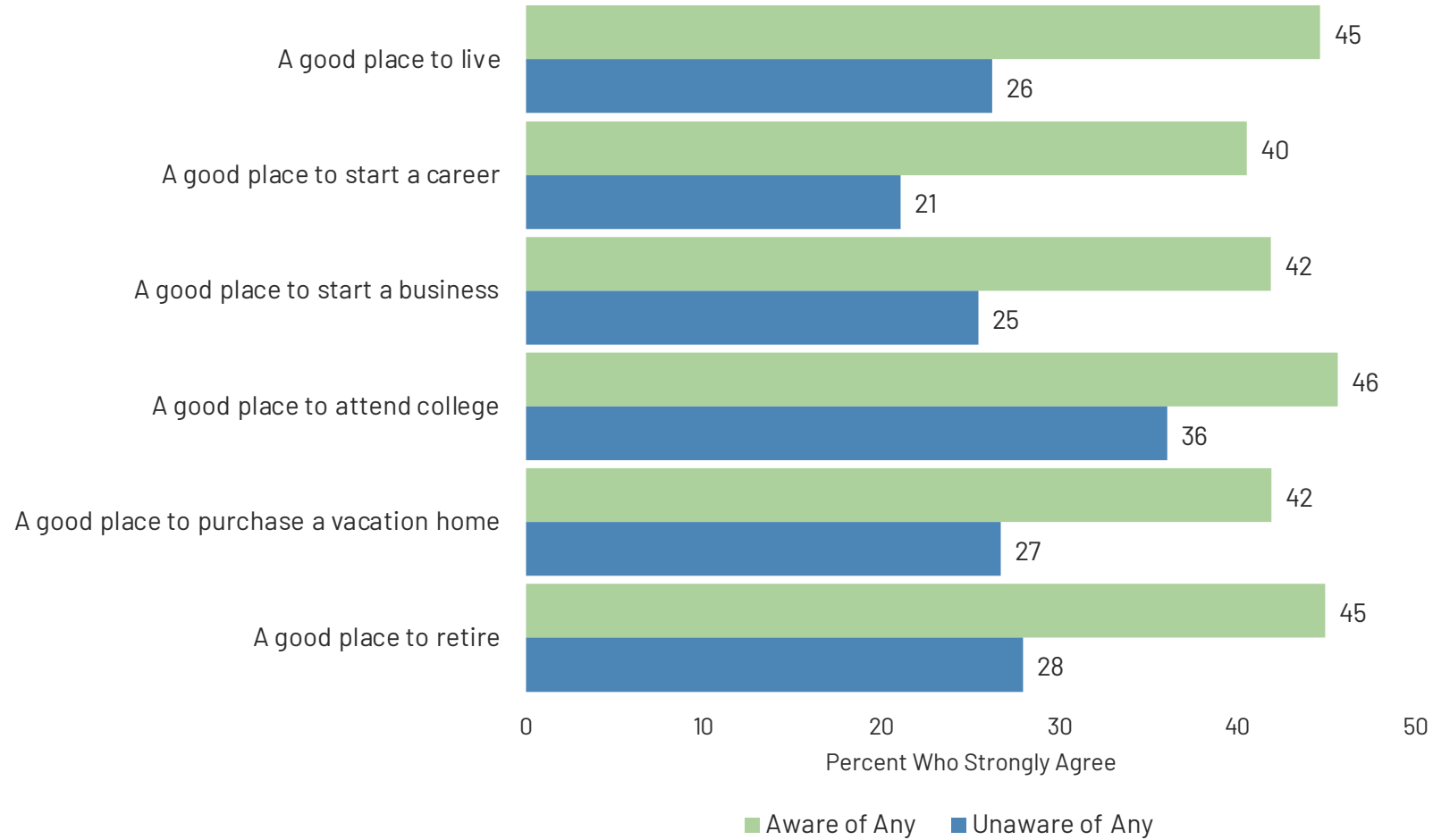
Research has long demonstrated that tourism advertising and the visitation it inspires have a **positive impact on consumers' image** of destinations as a place for leisure travel and recreation.

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?



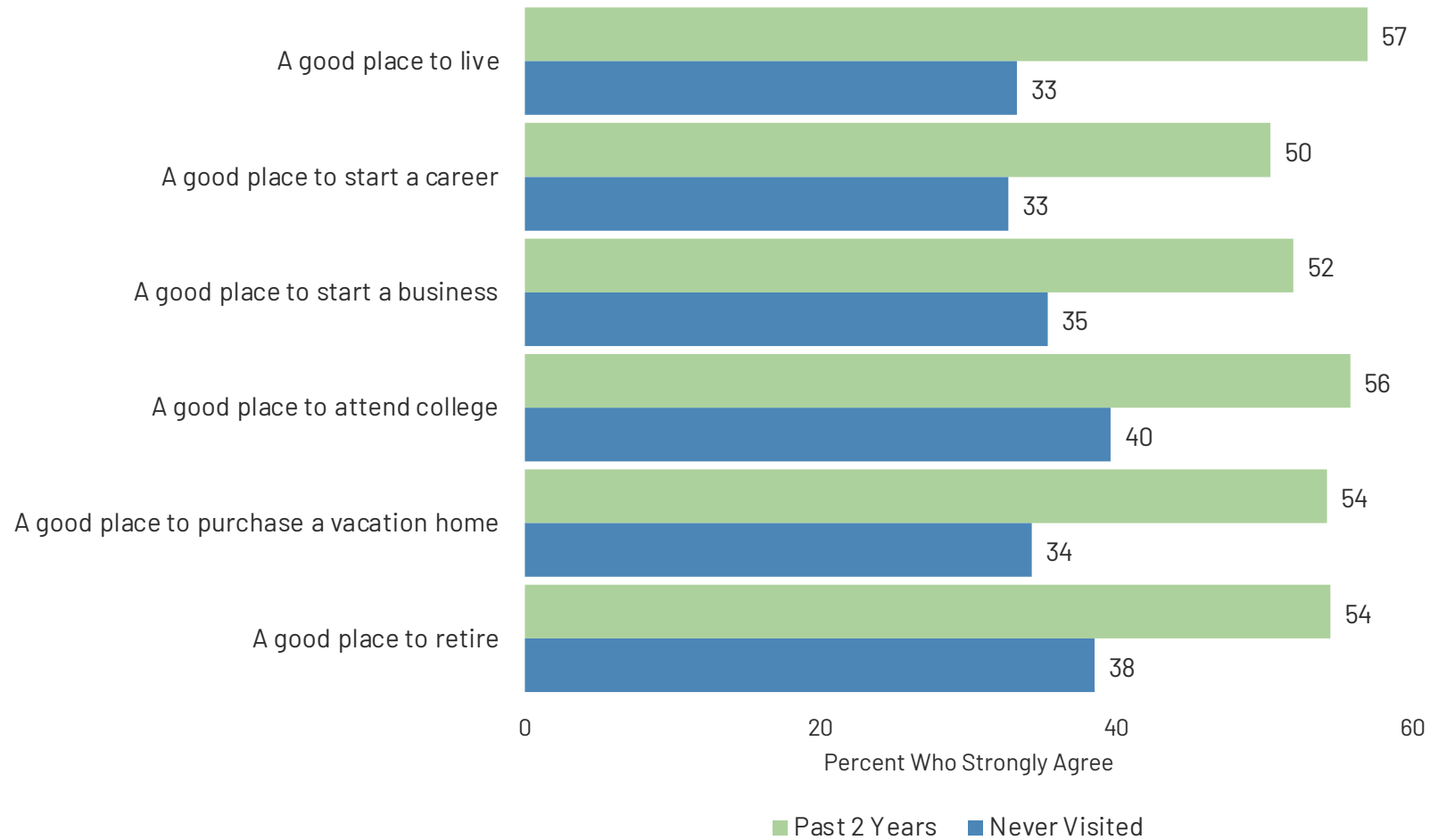
IMPACT OF *TOURISM AD AWARENESS* ON ECONOMIC DEVELOPMENT IMAGE

Base: New Markets



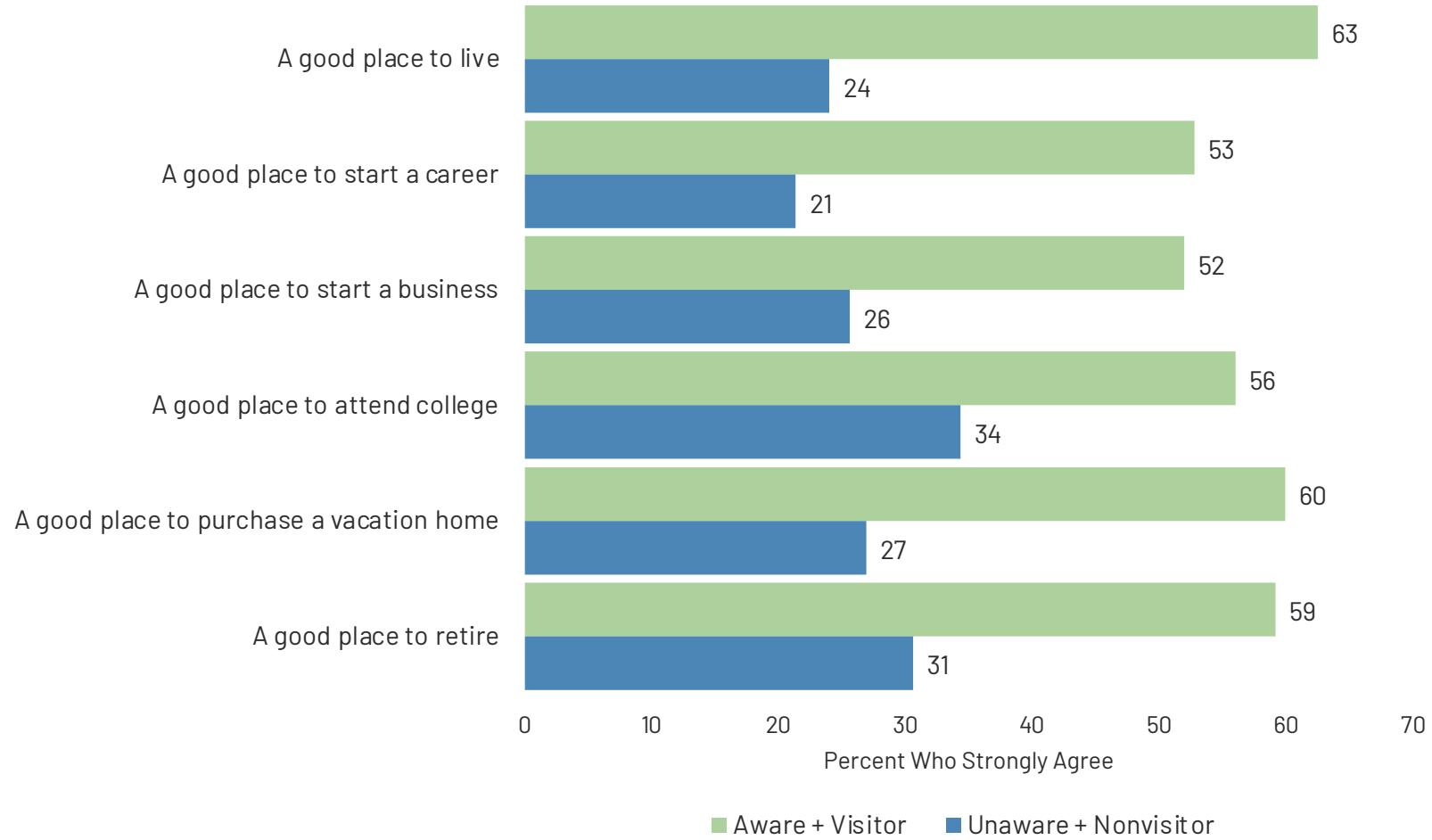
IMPACT OF *VISITATION* ON ECONOMIC DEVELOPMENT IMAGE

Base: New Markets



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

Base: New Markets





APPENDIX: IMAGE STRENGTHS AND
WEAKNESSES VS. INDIVIDUAL COMPETITION





KENTUCKY VS. TENNESSEE: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. TENNESSEE

Base: New Markets

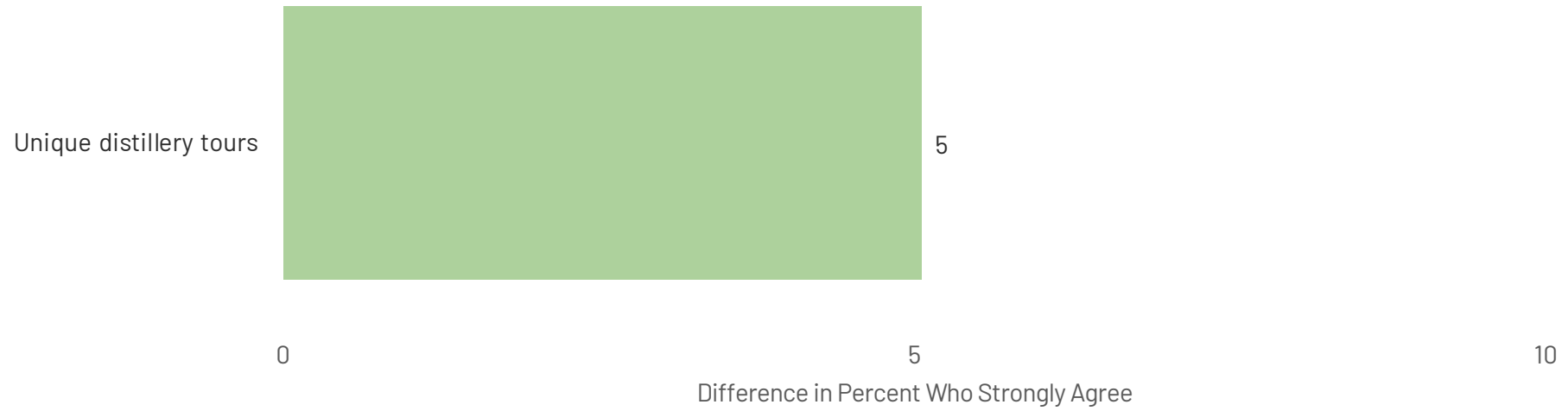
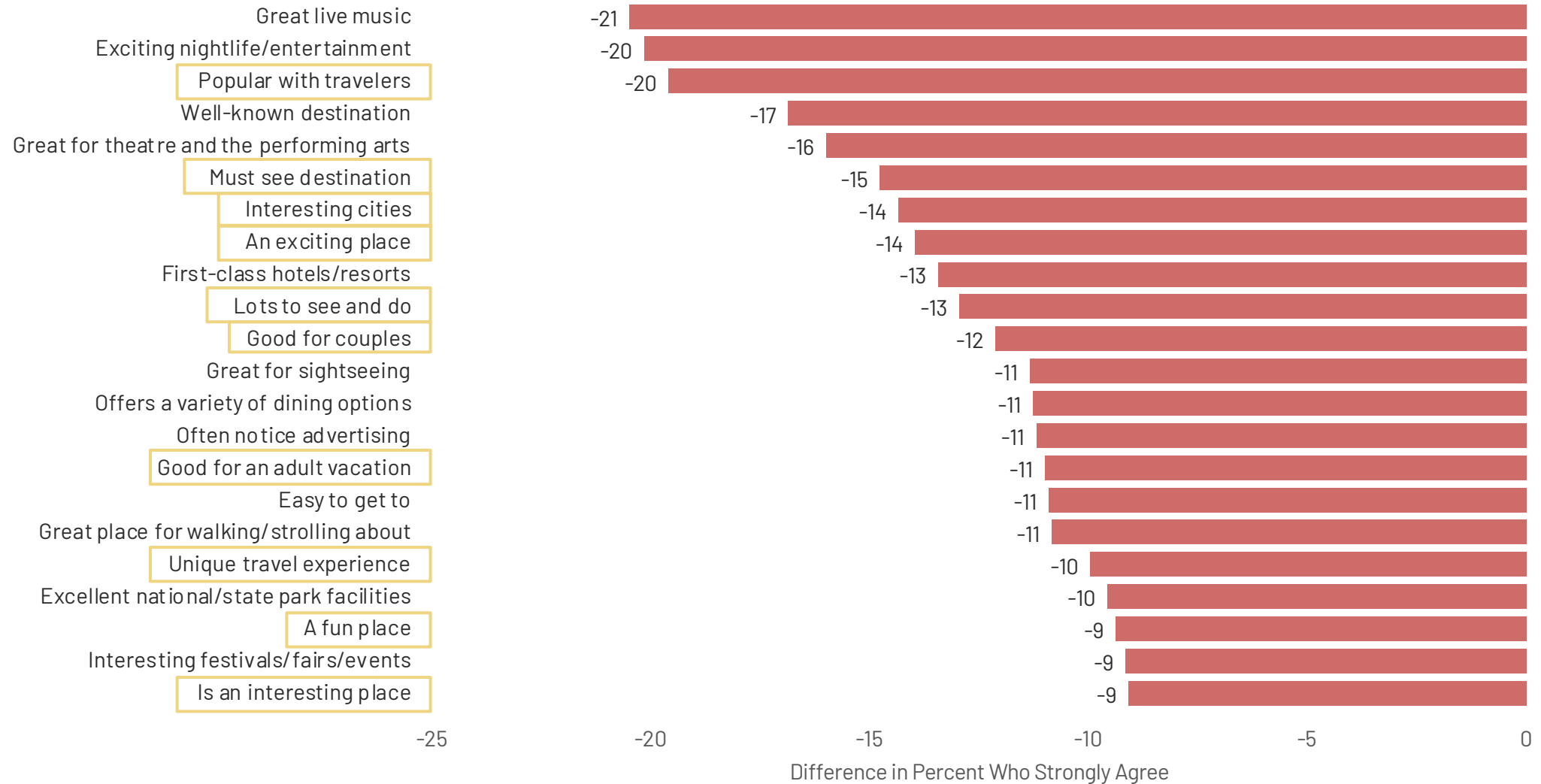


IMAGE WEAKNESSES VS. TENNESSEE

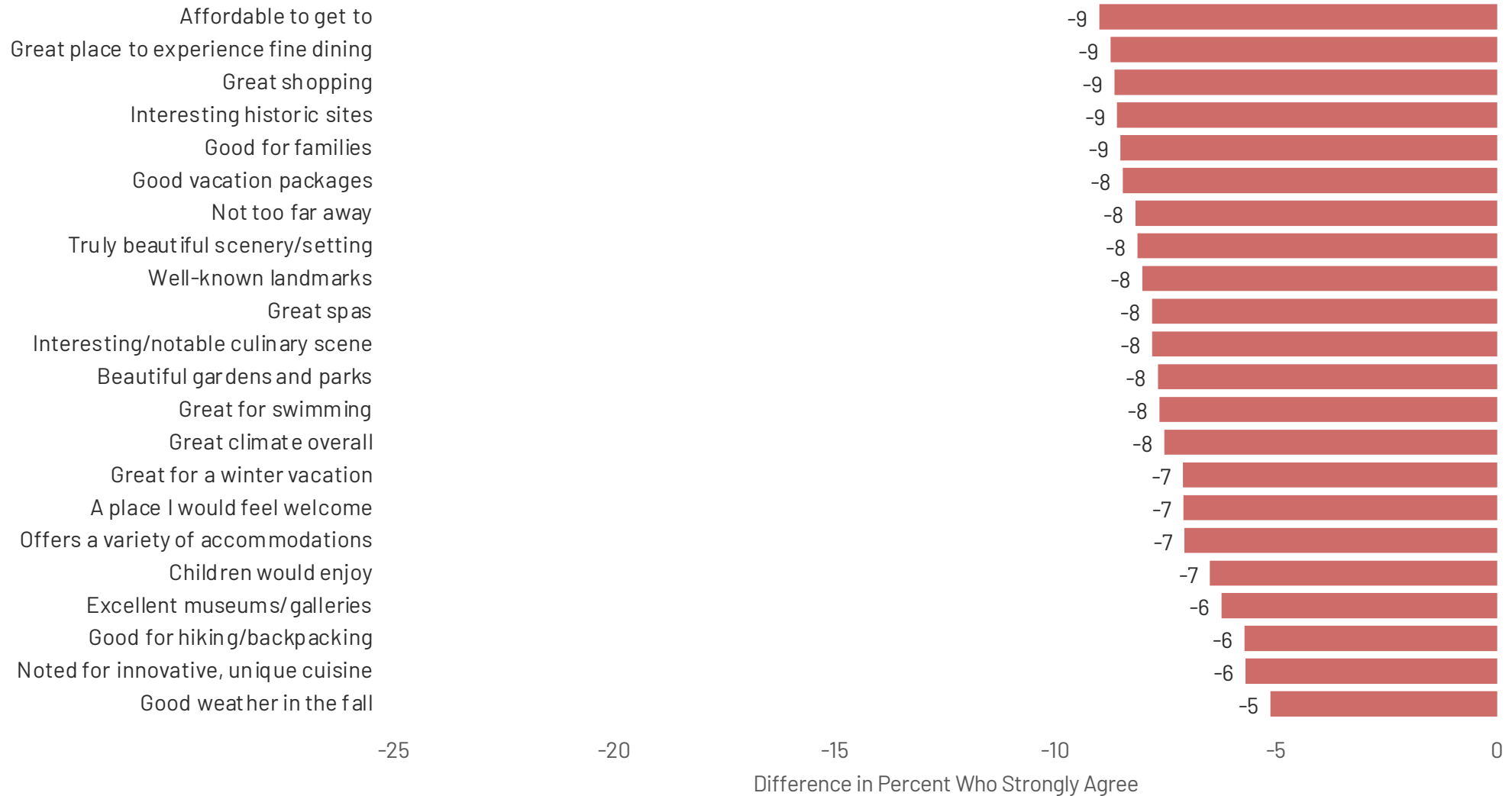
Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. TENNESSEE (CONT'D)

Base: New Markets





KENTUCKY VS. GEORGIA: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. GEORGIA

Base: New Markets

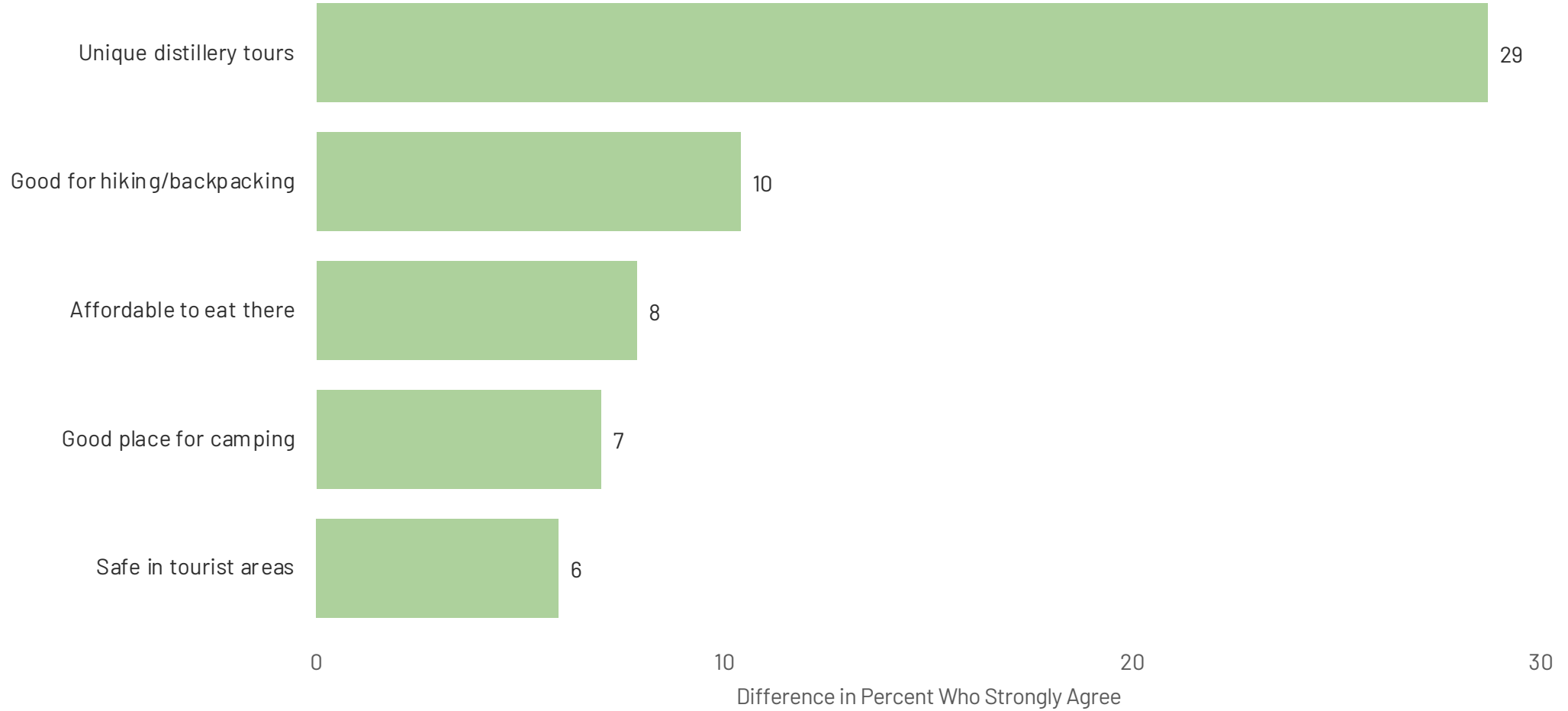
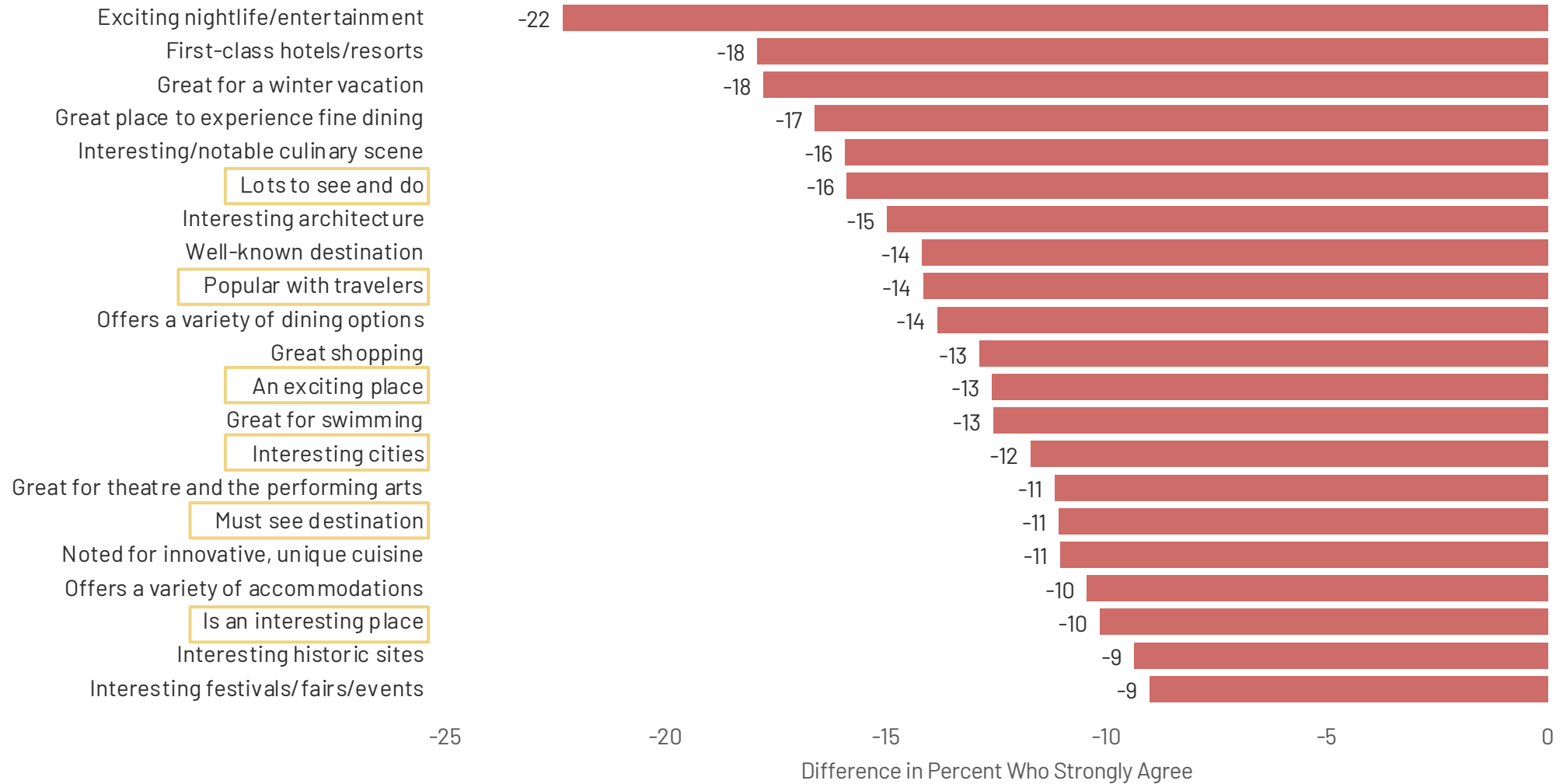


IMAGE WEAKNESSES VS. GEORGIA

Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. GEORGIA

Base: New Markets



Hot Button



KENTUCKY VS. INDIANA: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. INDIANA

Base: New Markets

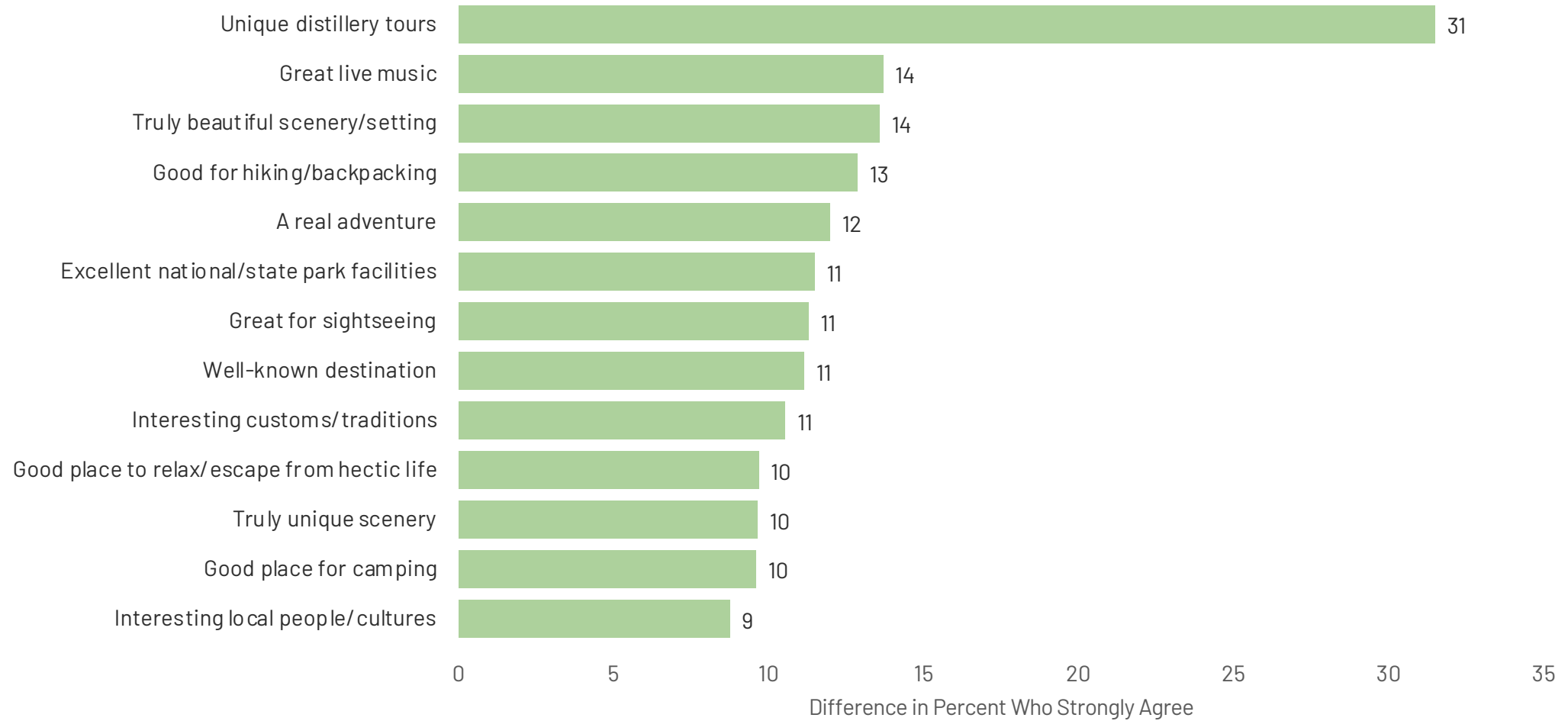
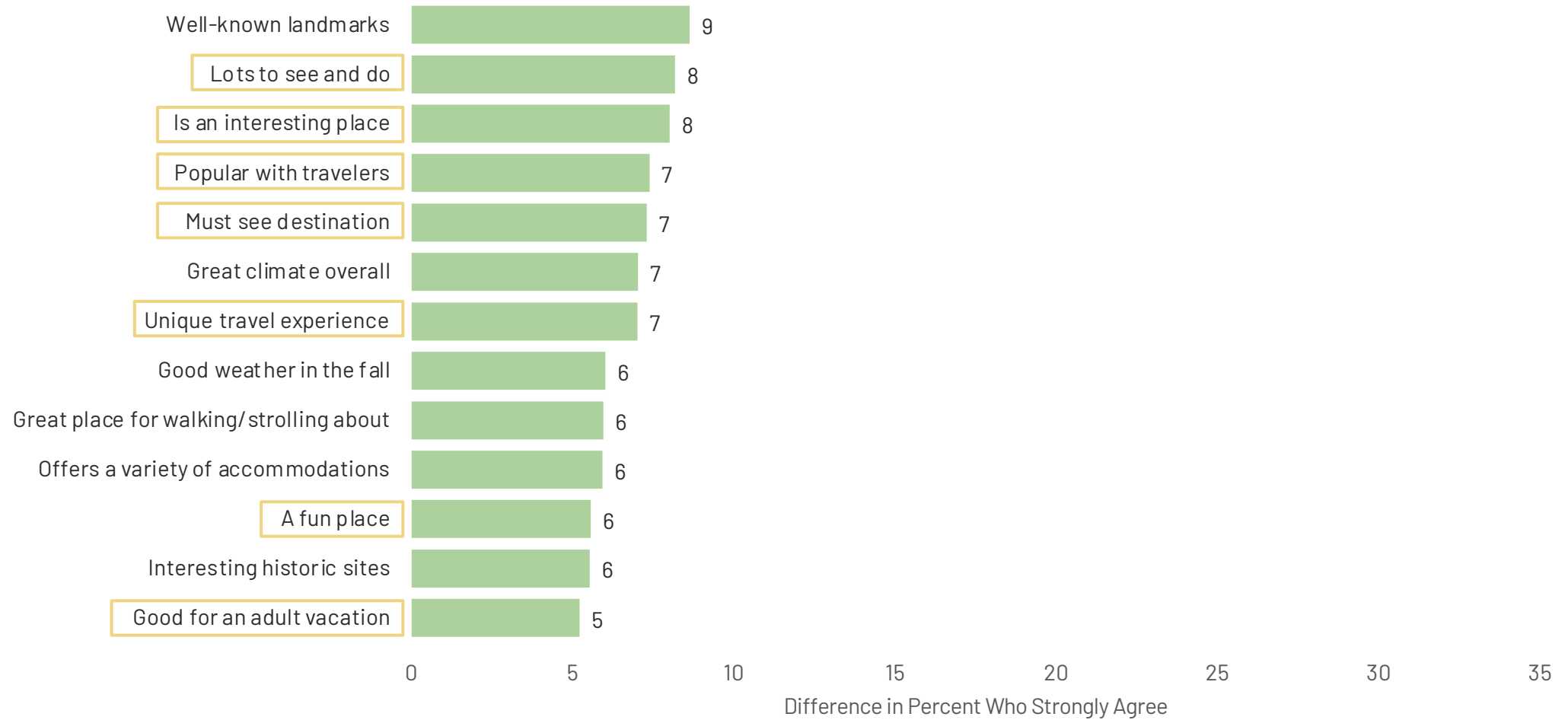


IMAGE STRENGTHS VS. INDIANA (CONT'D)

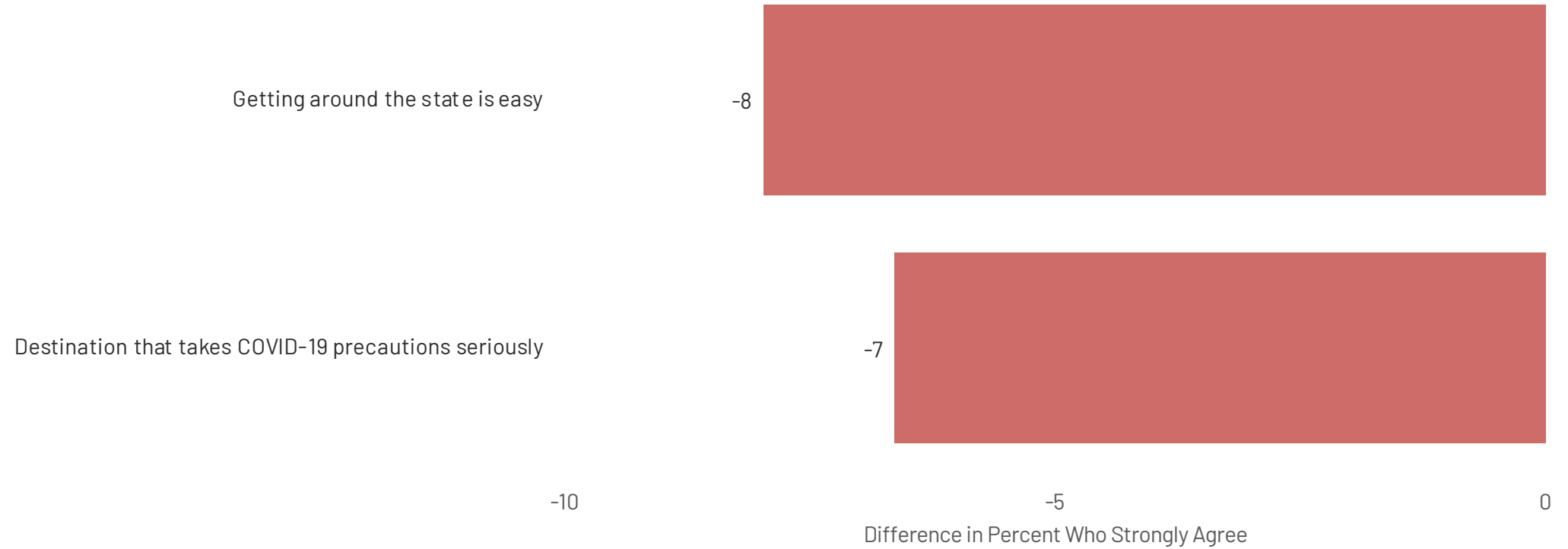
Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. INDIANA

Base: New Markets



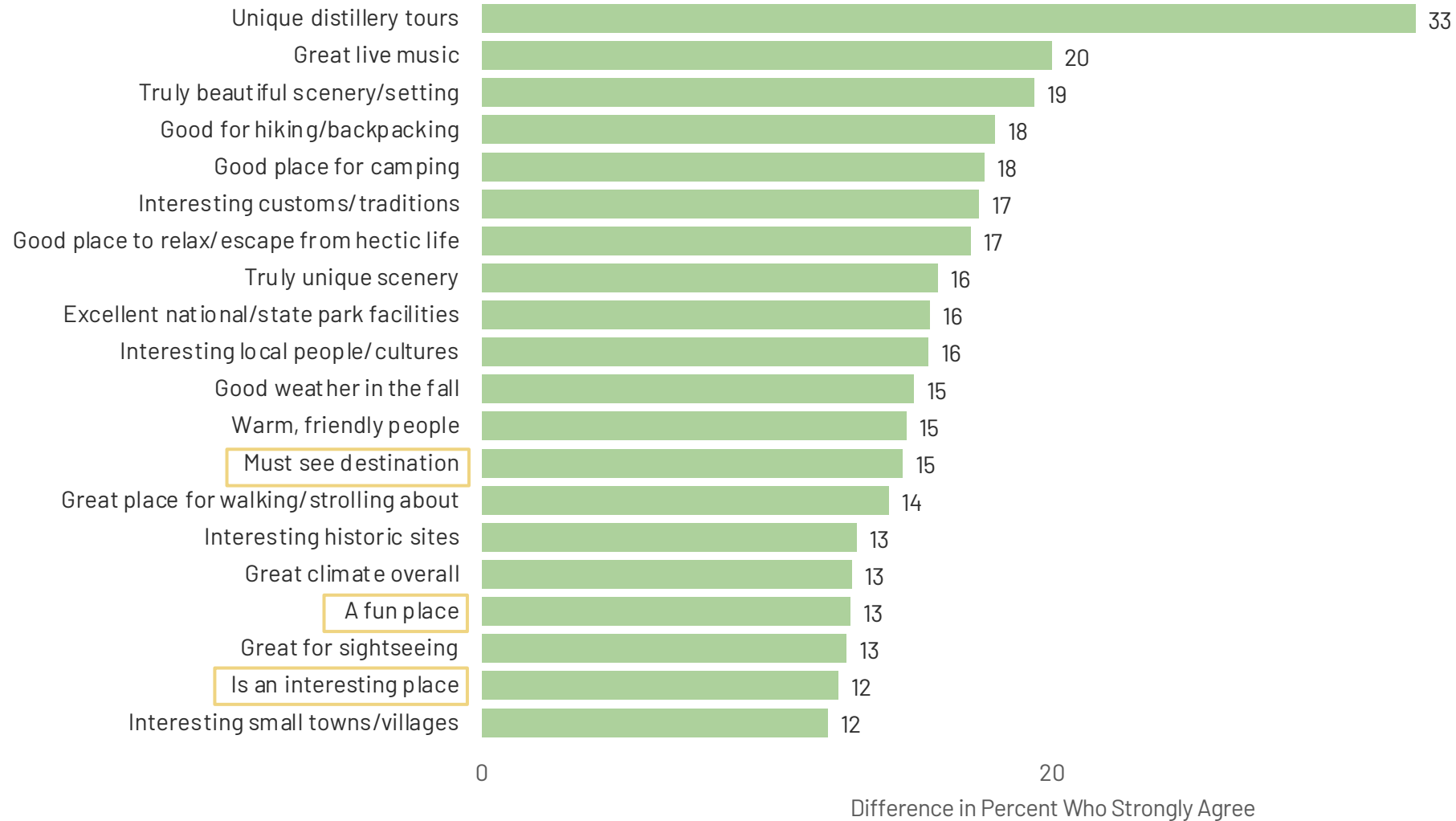


KENTUCKY VS. OHIO: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. OHIO

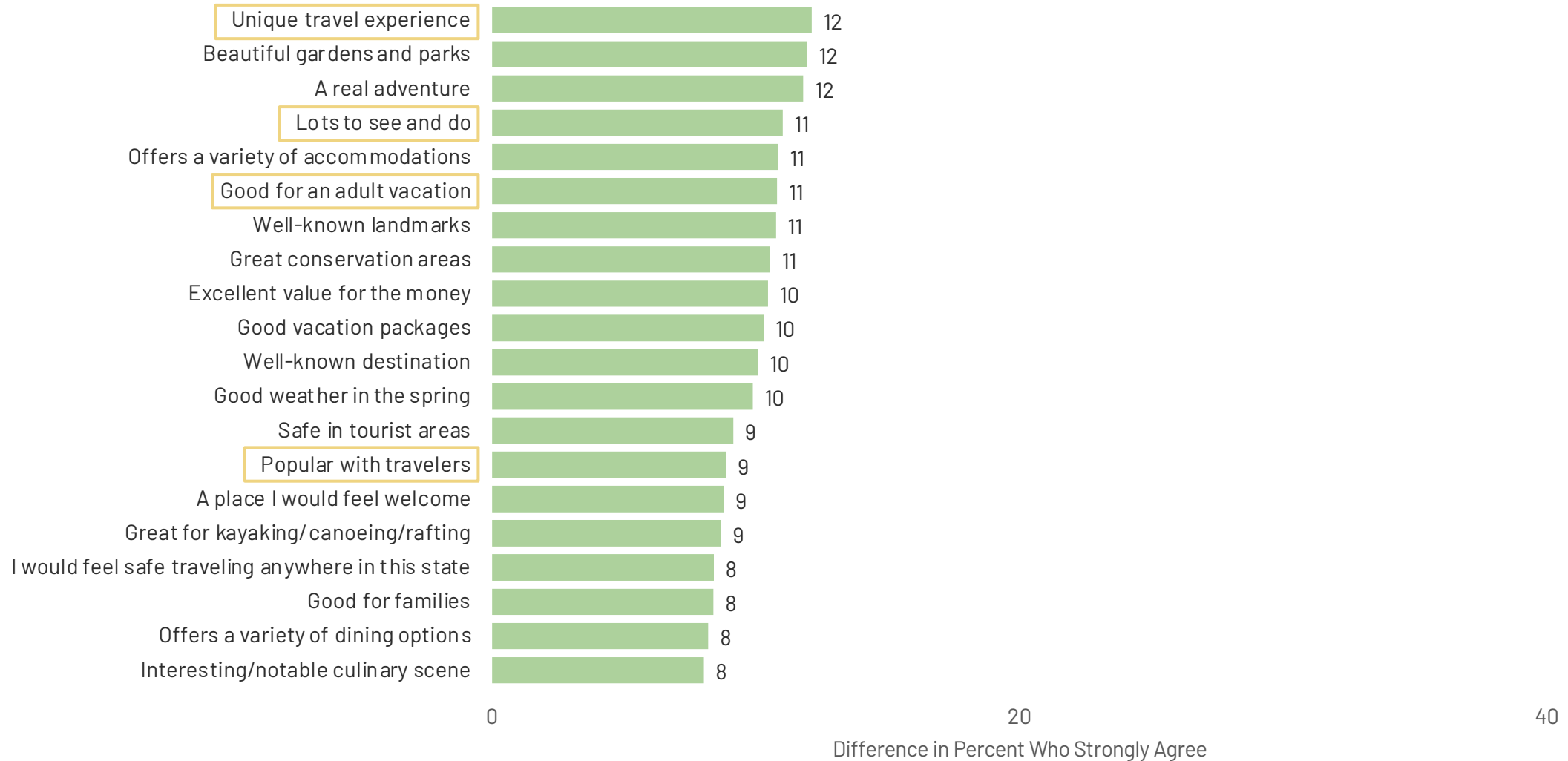
Base: New Markets



Hot Button

IMAGE STRENGTHS VS. OHIO (CONT'D)

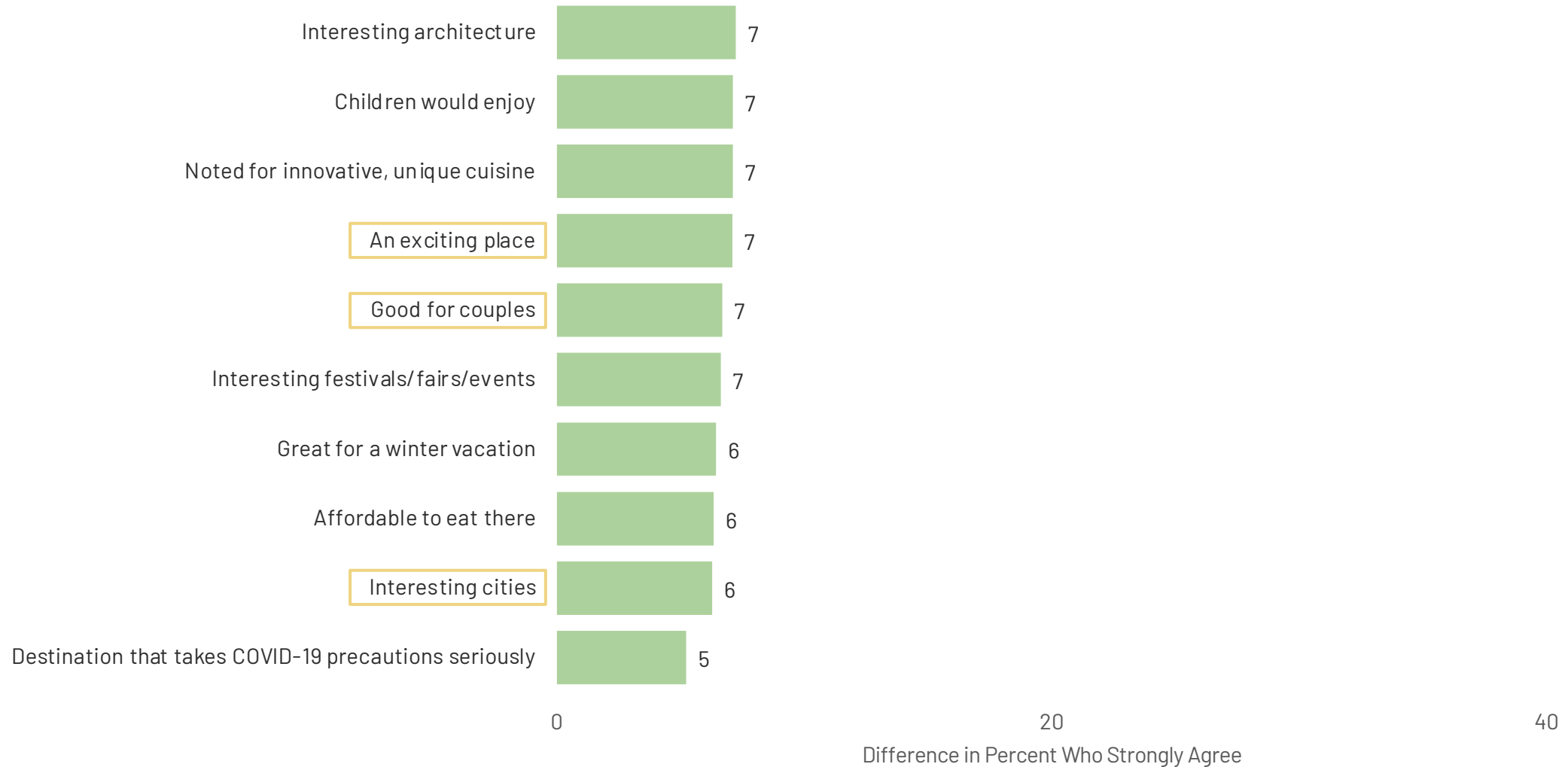
Base: New Markets



Hot Button

IMAGE STRENGTHS VS. OHIO (CONT'D)

Base: New Markets



Hot Button

Base: New Markets

THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE
WEAKNESSES VS. OHIO

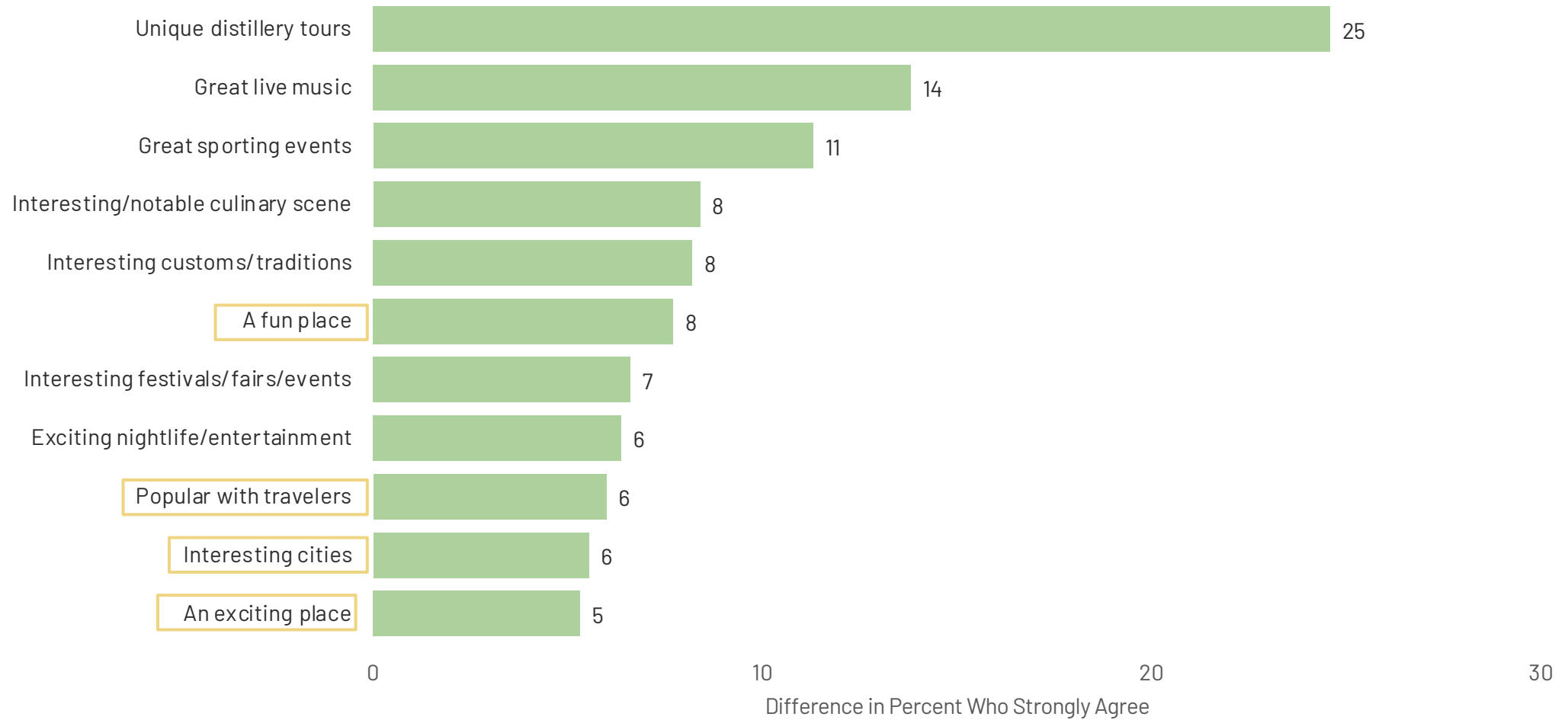


KENTUCKY VS. WEST VIRGINIA: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. WEST VIRGINIA

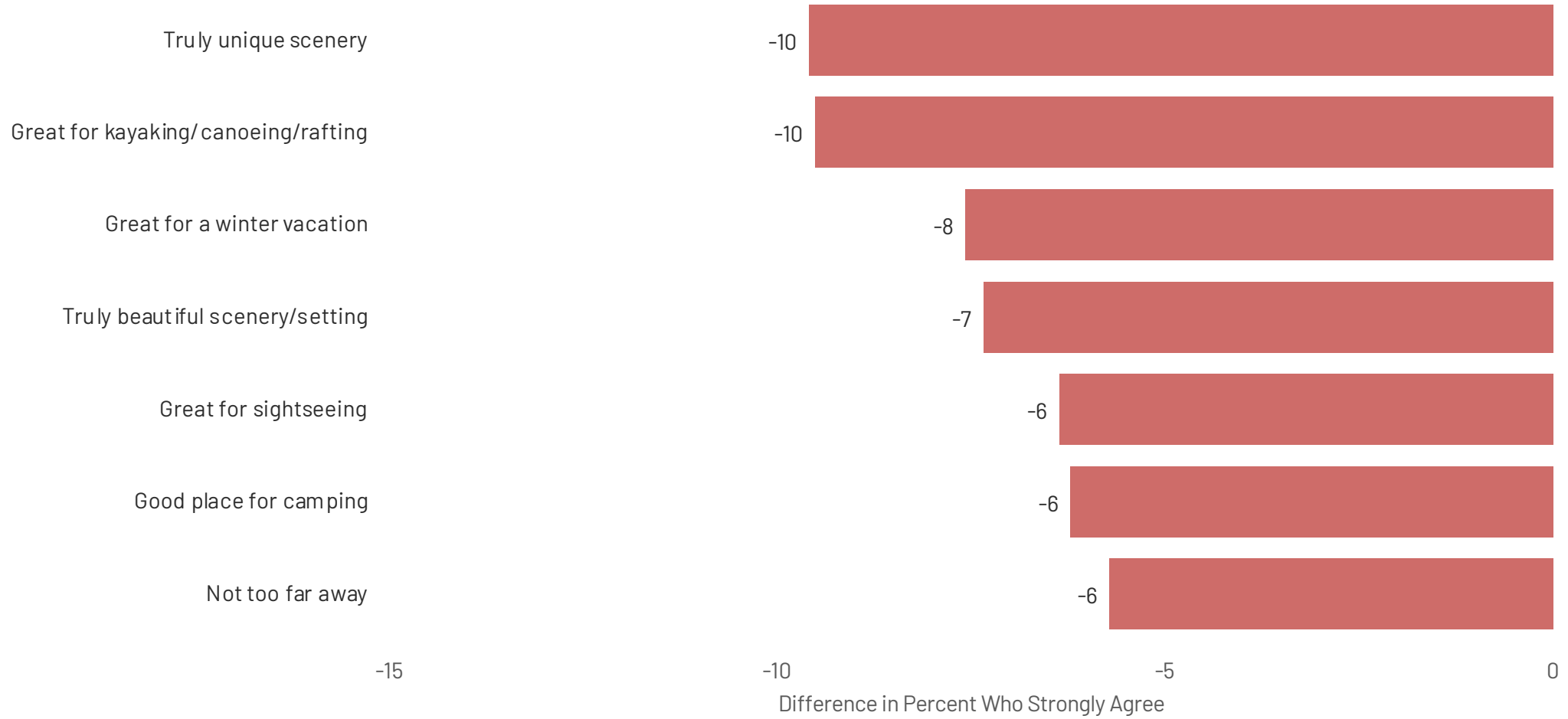
Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. WEST VIRGINIA

Base: New Markets





KENTUCKY VS. NORTH CAROLINA: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. NORTH CAROLINA

Base: New Markets

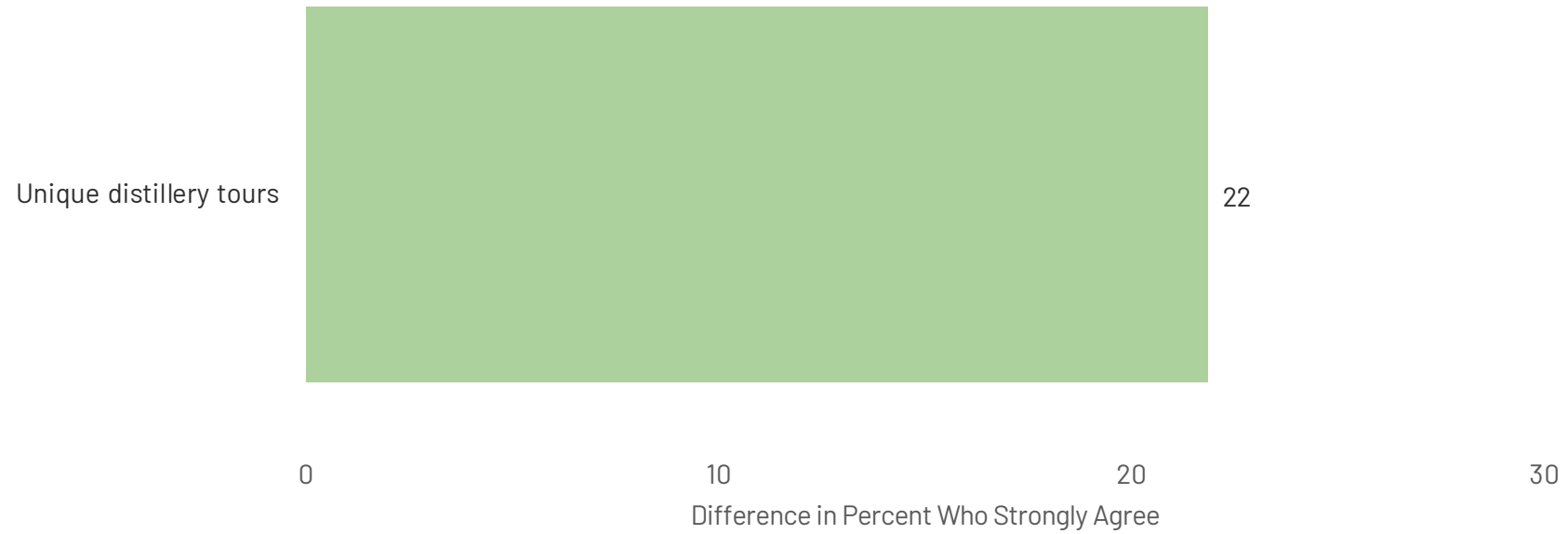
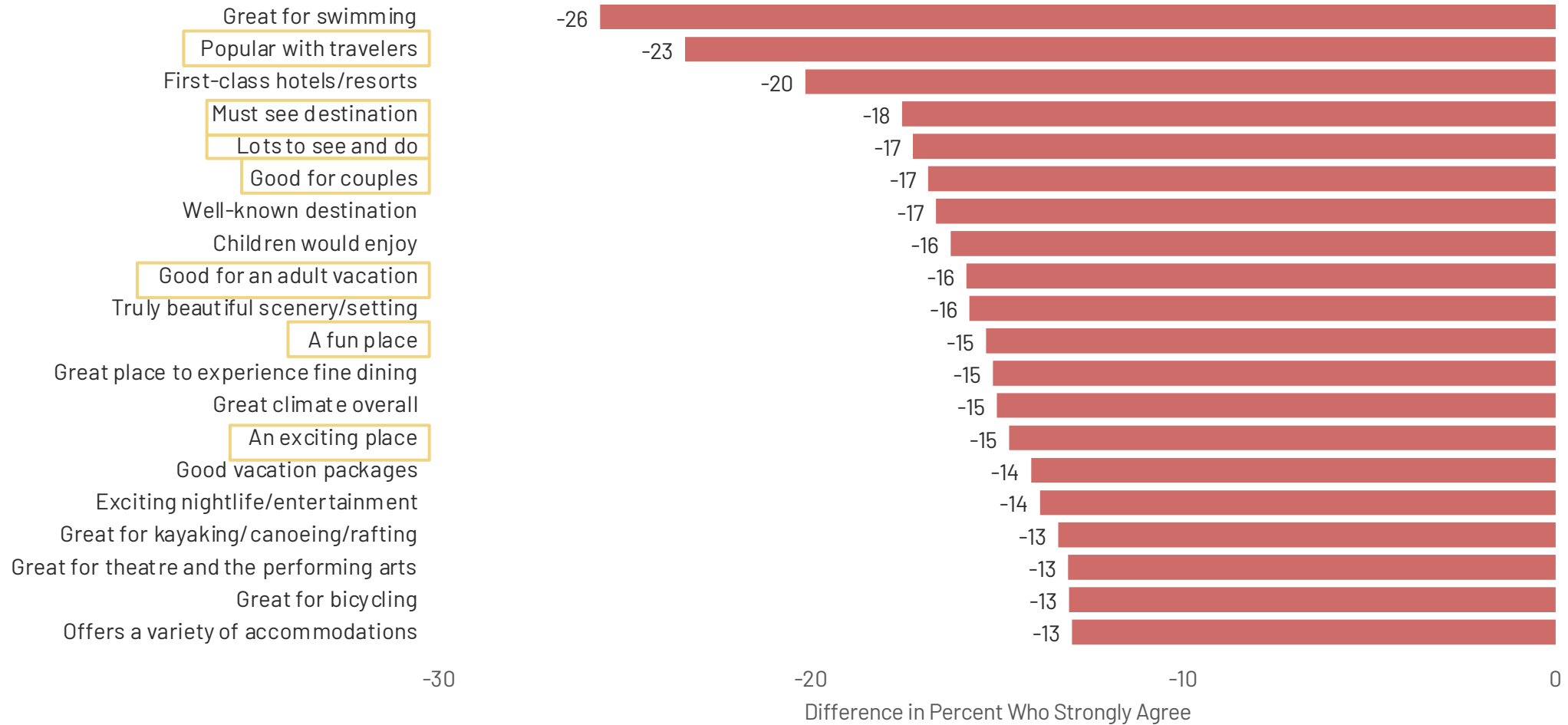


IMAGE WEAKNESSES VS. NORTH CAROLINA

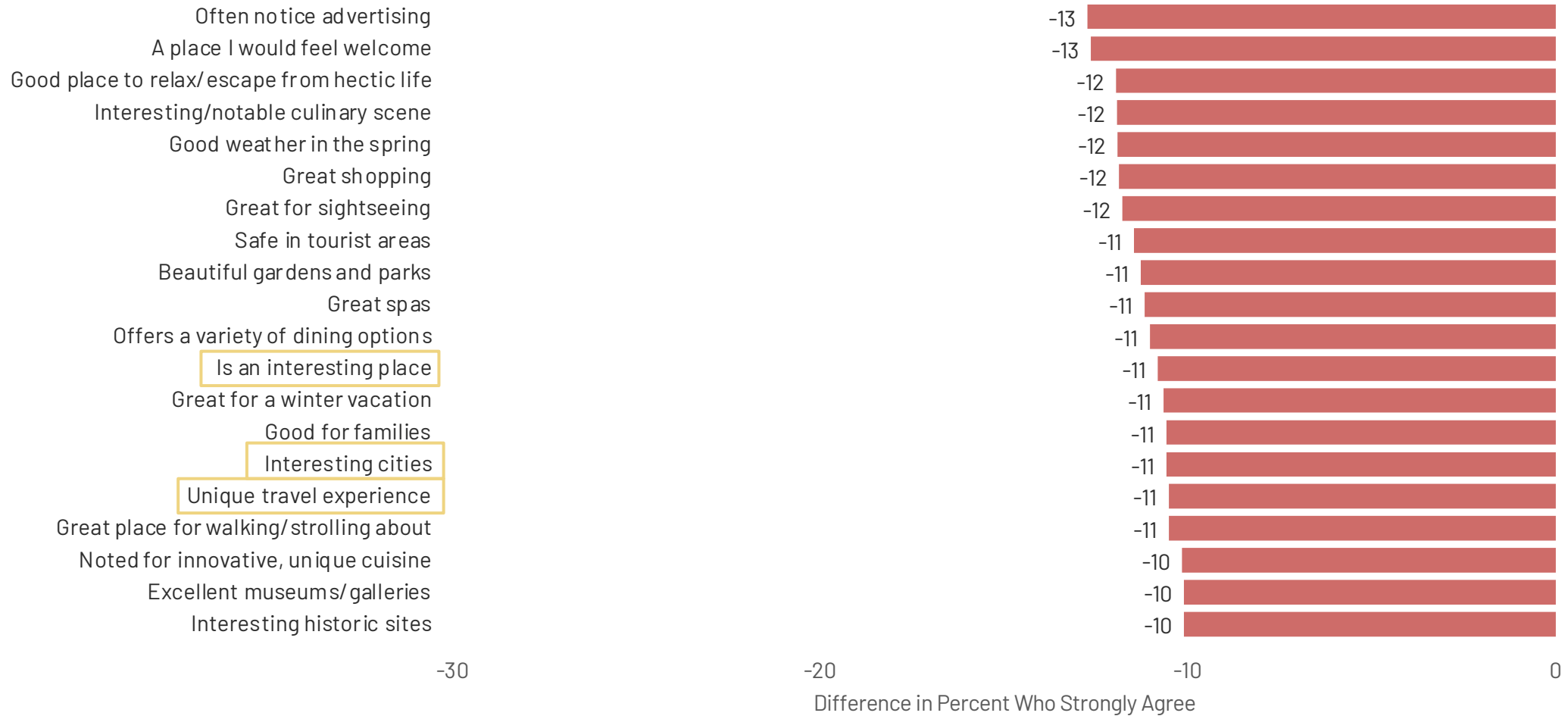
Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. NORTH CAROLINA (CONT'D)

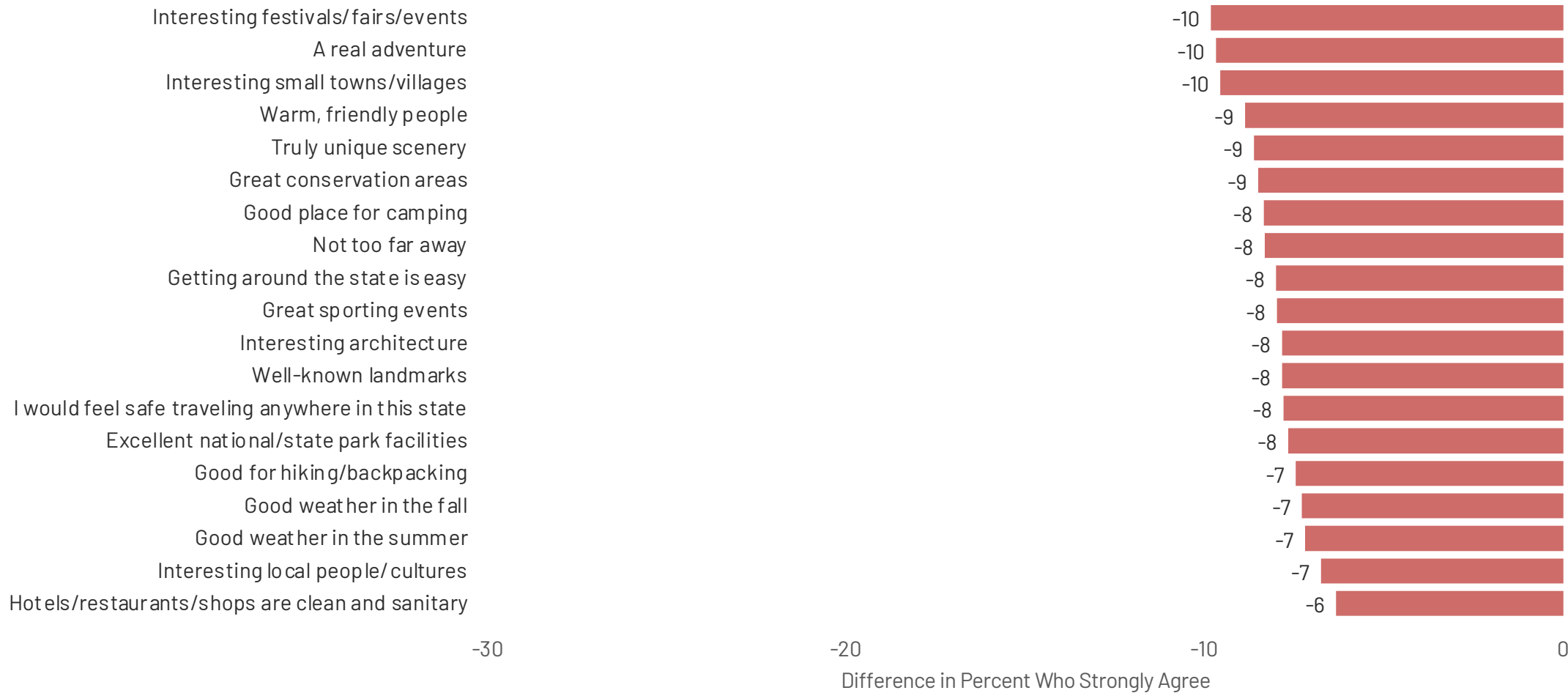
Base: New Markets



Hot Button

IMAGE WEAKNESSES VS. NORTH CAROLINA (CONT'D)

Base: New Markets



TEAM
KENTUCKY[®]



Longwoods
INTERNATIONAL

