

## Kentucky 2022 Advertising ROI Research – Existing Markets

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# Background and Purpose

- In 2022, Kentucky launched their advertising campaign in key markets.
  - The campaign consisted of both traditional and online media including:
    - Digital
    - Social
    - Print
    - Video
    - Out-of-home
    - Radio
- Longwoods was engaged to conduct a program of research designed to:
  - Measure the effectiveness of the advertising campaign in getting Kentuckians to travel within Kentucky during the campaign period and shortly thereafter, and increasing intentions to visit in the future.
  - Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Kentucky, and incremental taxes generated by that spending.
  - Through an analysis of Kentucky's image, provide input into the development of positioning and messaging for future campaigns.

# Research Objectives

- The objectives of the research were to measure:
  - Awareness of Kentucky as a desirable vacation destination.
  - Awareness of Kentucky's advertising activity, i.e., individual advertising elements.
  - Impact of Kentucky's advertising on:
    - Kentucky's image.
    - Actual visits in Kentucky during and shortly after the campaign period.
  - The relative importance of image factors in getting on the destination wish list.
  - Impact of Kentucky's advertising on conversion and intentions to visit by media combinations and markets.

# Method

- A benchmark study was conducted after the conclusion of the 2022 spring/summer/fall campaigns 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.
  - A Kentucky self-completion survey of 1,016 respondents in the advertising markets, distributed as follows:

<b>Existing Markets</b>	
<b>ATLANTA</b>	163
<b>BOWLING GREEN</b>	10
<b>CHARLESTON-HUNTINGTON</b>	30
<b>CHICAGO</b>	221
<b>CINCINNATI</b>	58
<b>COLUMBUS, OH</b>	60
<b>DETROIT</b>	110
<b>EVANSVILLE</b>	21
<b>INDIANAPOLIS</b>	72
<b>KNOXVILLE</b>	32
<b>LEXINGTON</b>	31
<b>LOUISVILLE</b>	44
<b>NASHVILLE</b>	66
<b>PADUCAH-CAPE GIRARDEAU-HARRISBURG</b>	20
<b>SAINT LOUIS</b>	70
<b>Tri-Cities DMA Counties: Leslie and Letcher</b>	8
<b>Total</b>	<b>1016</b>

# Method (Cont'd)

- Respondents are members of a major online consumer research panel.
- Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
- Sample was drawn to be proportionate to population by specific states/cities, age, sex and income.
- The survey took an average of 18 minutes to complete.
- During the survey respondents were shown copies of the advertising materials. This was done at the end of the survey as not to bias earlier questions on attitudes towards Kentucky and other behavioral measures.
- The fieldwork was conducted in March 2023
- Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population.
- For a sample of this size, the confidence level is + / – 2.5%, 19 times out of 20.

# Method (Cont'd)

- The estimates of the campaign's impacts on visits and intentions to visit 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.
- Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,016 travelers).



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## Conclusions and Recommendations



# Key Findings

- Almost six in ten travelers in Kentucky's existing advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. This is significantly higher than 2021's half.
- Among existing market travelers, there's only a 14-point difference between the media type with the highest and lowest awareness. Around four in existing market travelers recalled at least one video, digital, or print ad, a third recalled at least one social or radio ad, and a quarter recalled at least one OOH ad.
- Over one in ten were aware of the Kentucky Tourism website, with seven in ten of those travelers finding it very helpful.
- Focusing on these existing markets, the campaigns included in this study produced an additional 2.2 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$308.8 million on those trips. When related to advertising costs of \$4.9 million, this translates into a return on investment of \$63 in visitor spending for each ad dollar spent.
- KDT spent \$2.19 for every incremental trip taken originating from the existing markets.

## Key Findings (Cont'd)

- Those incremental expenditures in existing advertising markets yielded \$23.5 million in state and county taxes. There was a return on investment of \$5 in taxes for each ad dollar spent.
- Among travelers in Kentucky's existing markets, for a destination in this competitive set to get on their consideration list, it must, first and foremost, be perceived to:
  - Be exciting – being seen as exciting means being a must-see place to visit, offering a real sense of fun, excitement, and adventure.
  - Be suitable for adults and couples.
  - A great family atmosphere – good destination for families that children would enjoy visiting.
- The Hot Buttons, or ten individual Image attributes most closely tied to destination selection in Kentucky's existing markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; good for an adult vacation; a real adventure; lots to see and do; children would enjoy; and great for sightseeing.
- The campaign had a positive impact on travelers' perceptions of Kentucky. For the more detailed attributes, we find that the campaign did a great job of improving people's perceptions of Kentucky for every image dimension evaluated. For the existing advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study. In fact, there are no variables where significantly more travelers unaware of the advertising rated Kentucky higher than those who were aware of the KDT campaign.

# Key Findings (Cont'd)

- Recent visitation from the state's existing markets positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study. Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.
- Almost six in ten travelers within the existing advertising markets have visited Kentucky during their lifetimes, over a third have visited Kentucky during the past 2 years, and almost half intend to visit Kentucky during the next 12 months.
- Among travelers who visited Kentucky overnight, the three most popular activities were shopping, outdoor activities, and trying unique/local foods.
- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their existing advertising markets. Tennessee, North Carolina, and Georgia are Kentucky's strongest competition.
- Longwood's Halo Effect research measures the impact of KDT's advertising as well as visitation to the state on Kentucky's reputation on broader economic impact areas outside of tourism. Looking at the existing advertising markets, in every case, Kentucky's tourism advertising significantly improved the image of Kentucky for a wide range of economic development objectives. Visitation significantly improved the image of Kentucky for all variables as well. For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Kentucky.



## Main Findings: Advertising Impacts



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Advertising  
Awareness

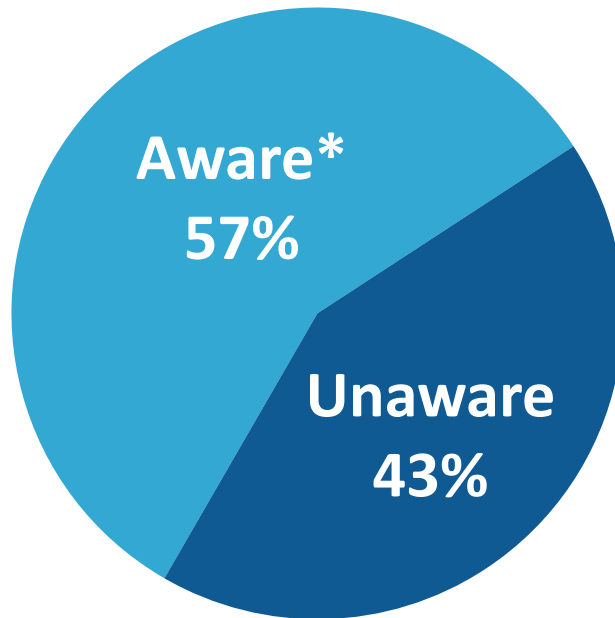
# Advertising Awareness

- Almost six in ten (57%) travelers in Kentucky's existing advertising markets recalled seeing at least one Kentucky Department of Tourism (KDT) ad. This is significantly higher than 2021's half (50%).
- Among existing market travelers, there's only a 14-point difference between the media type with the highest and lowest awareness. Around four in ten existing market travelers recalled at least one video (41%), digital (38%), or print (37%) ad, a third recalled at least one social (33%) or radio (32%) ad, and a quarter recalled at least one OOH (27%) ad.
- Over one in ten (14%) were aware of the Kentucky Tourism website, with seven in ten (70%) of those travelers finding it very helpful.
- Four in ten (38%) travelers in Kentucky's existing markets conducted an internet search to obtain more information about traveling to Kentucky, and two in ten visited [www.KentuckyTourism.com](http://www.KentuckyTourism.com) (19%) or researched the state on social media (19%).

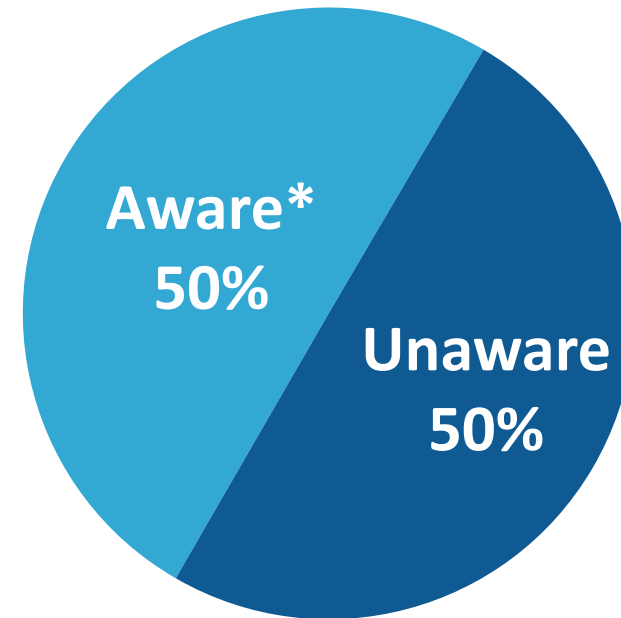
# Awareness of the Ad Campaign – Existing Markets 2022 vs. 2021

Base: Existing Market

**2022**



**2021\*\***

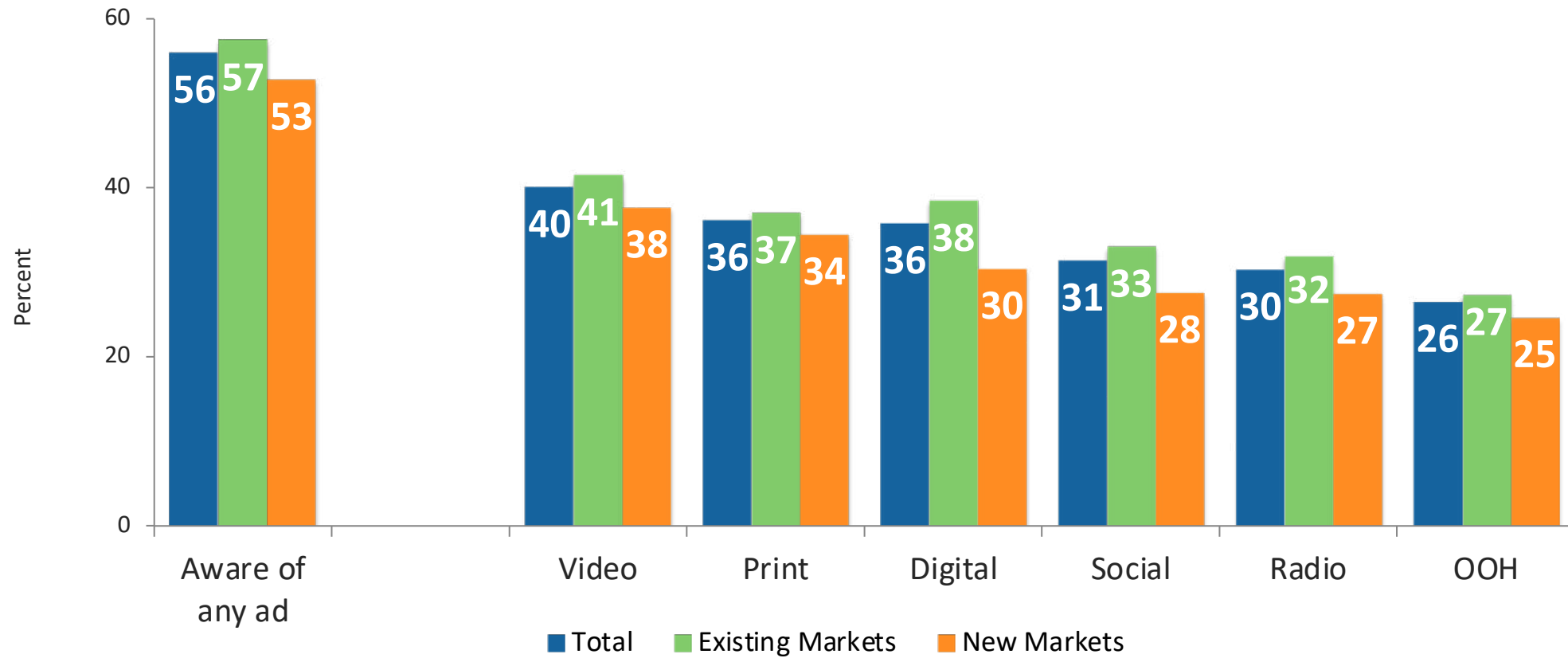


\*Saw at least one ad

\*\*Existing Market DMAs 2021: Bowling Green; Cincinnati; Evansville; Knoxville; Lexington; Louisville; Memphis; Nashville; Paducah-Harrisburg DMA (KY only); Indianapolis; Columbus, OH; Chicago; Atlanta; Saint Louis; Tri-Cities (KY only); Charleston/Huntington (KY only)

# Advertising Awareness\* by Medium

Base: Residents of Kentucky's Advertising Markets



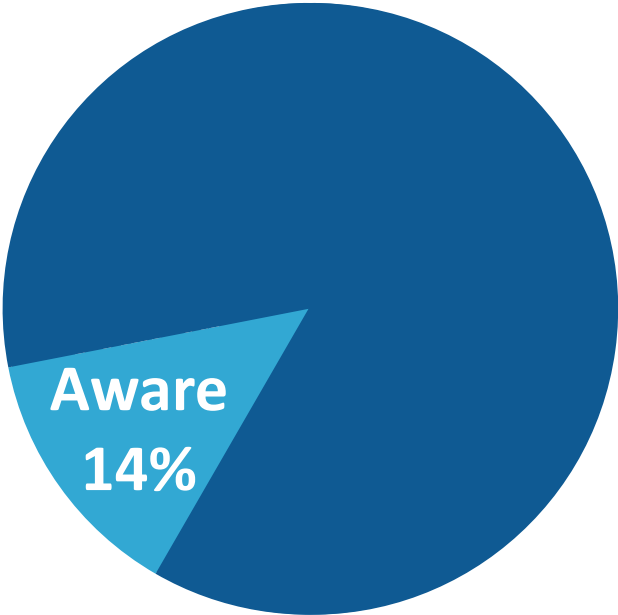
\*Saw at least one ad and based on markets where shown



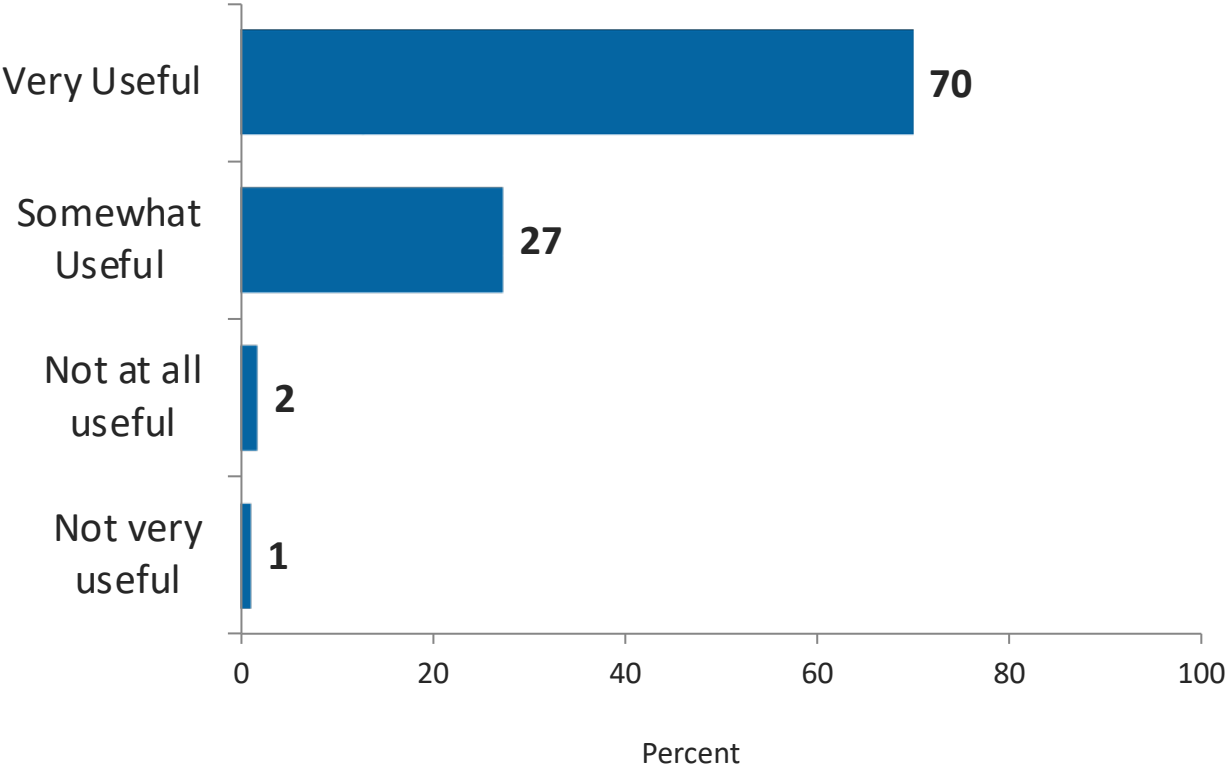
# Kentucky Tourism Website

Base: Existing Markets

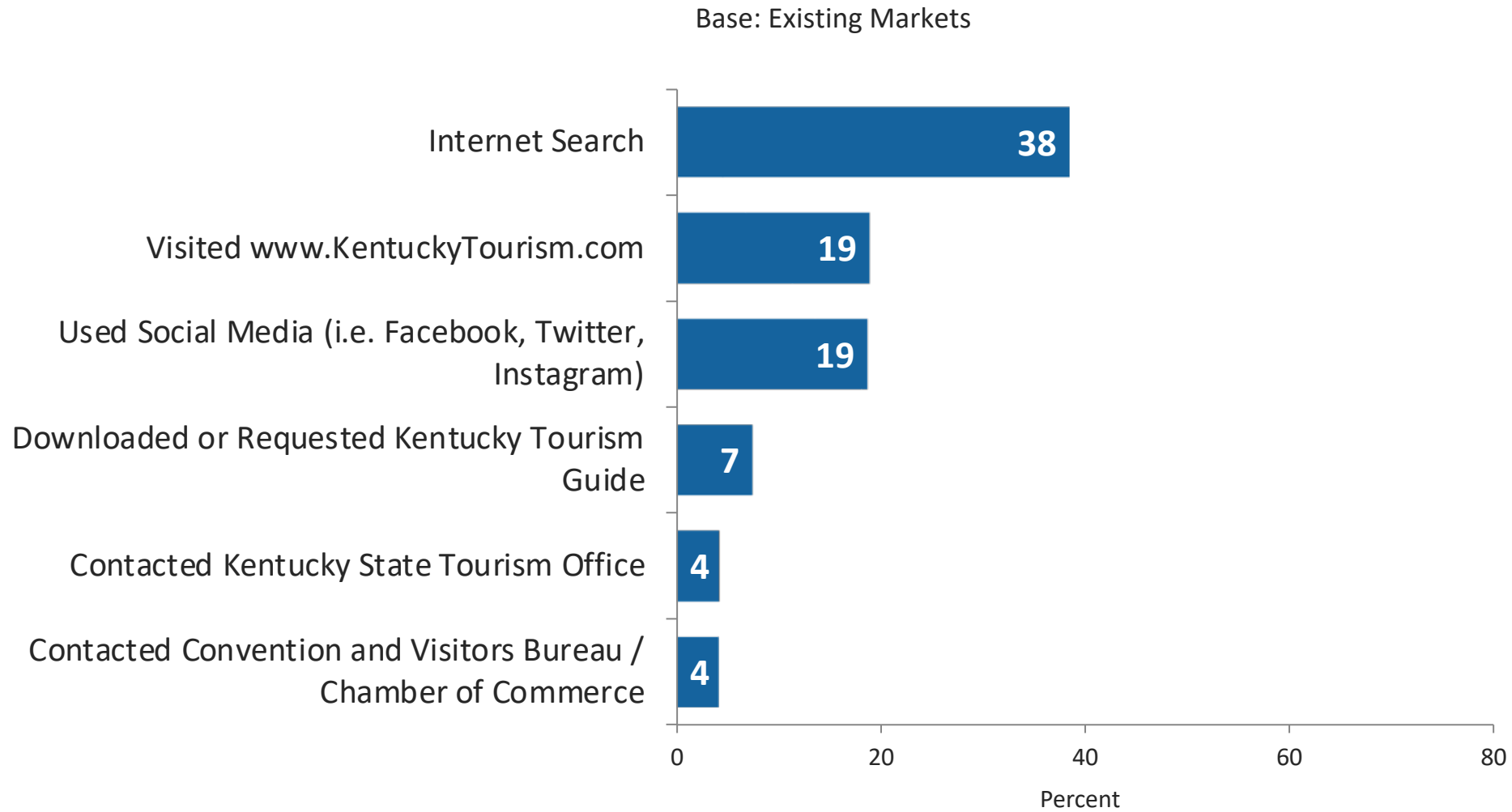
## Awareness of Website



## How useful was the Kentucky Tourism website?



# Actions Taken to Obtain Information about Traveling to Kentucky





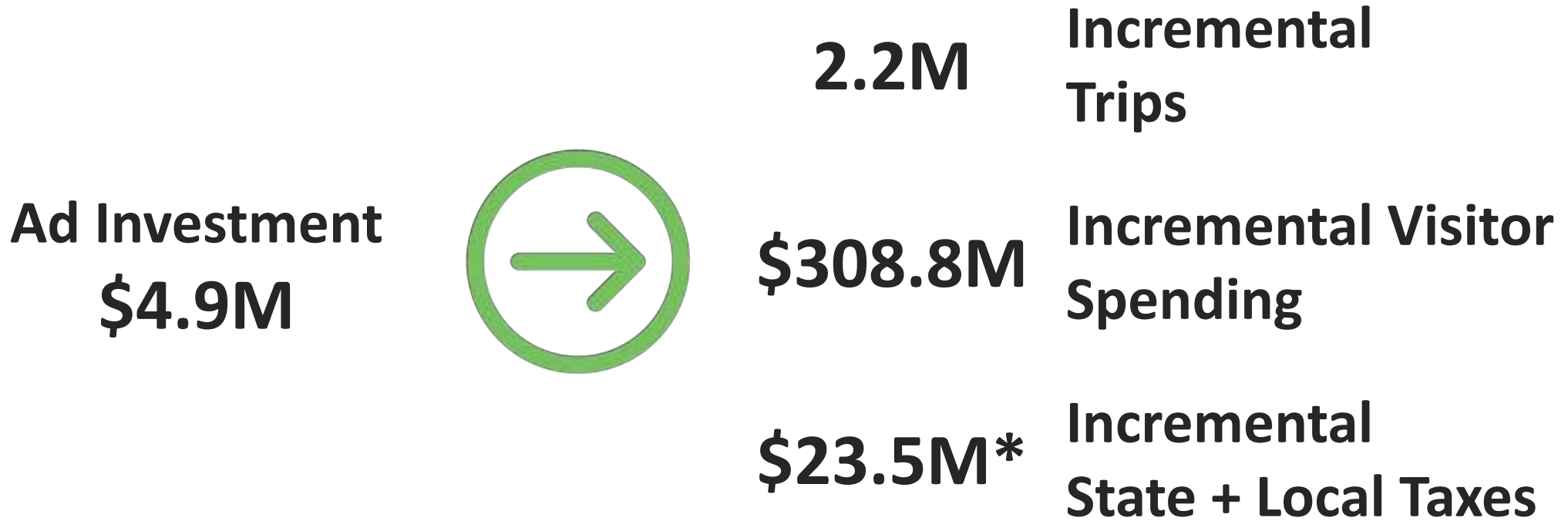
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**Short Term  
Conversion**

# Short-Term Conversion

- Focusing on these existing markets, the campaigns included in this study produced an additional 2.2 million trips to Kentucky, that otherwise would not have materialized in the absence of advertising.
- Using Travel USA estimates of average visitor expenditures, we estimate that these incremental Kentucky visitors spent \$308.8 million on those trips. When related to advertising costs of \$4.9 million, this translates into a return on investment of \$63 in visitor spending for each ad dollar spent.
- KDT spent \$2.19 for every incremental trip taken originating from the existing markets.
- Those incremental expenditures in existing advertising markets yielded \$23.5 million in state and county taxes. There was a return on investment of \$5 in taxes for each ad dollar spent.

# Short-Term Incremental Trips, Spending and Taxes Due to Advertising – Existing Markets



\*Effective Direct Tax rate 7.6% (from Tourism Economics)

# Campaign Efficiency

	Existing Markets
Ad \$'s per Trip	\$2.19
Trips per Ad \$	0.46

# The Bottom Line in 2022 – Existing Markets

**\$1**  
in advertising  
investment



**\$63** Spending ROI

**\$5** Tax ROI

Every \$1 invested in the 2022 Kentucky advertising campaign generated \$63 in direct visitor spending and \$5 in taxes in the state

# The Bottom Line – Existing Markets

## Existing Markets

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

*\*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.*





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**Main Findings:  
Kentucky's Overall  
Position in the  
Target Market**



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## Destination Hot Buttons

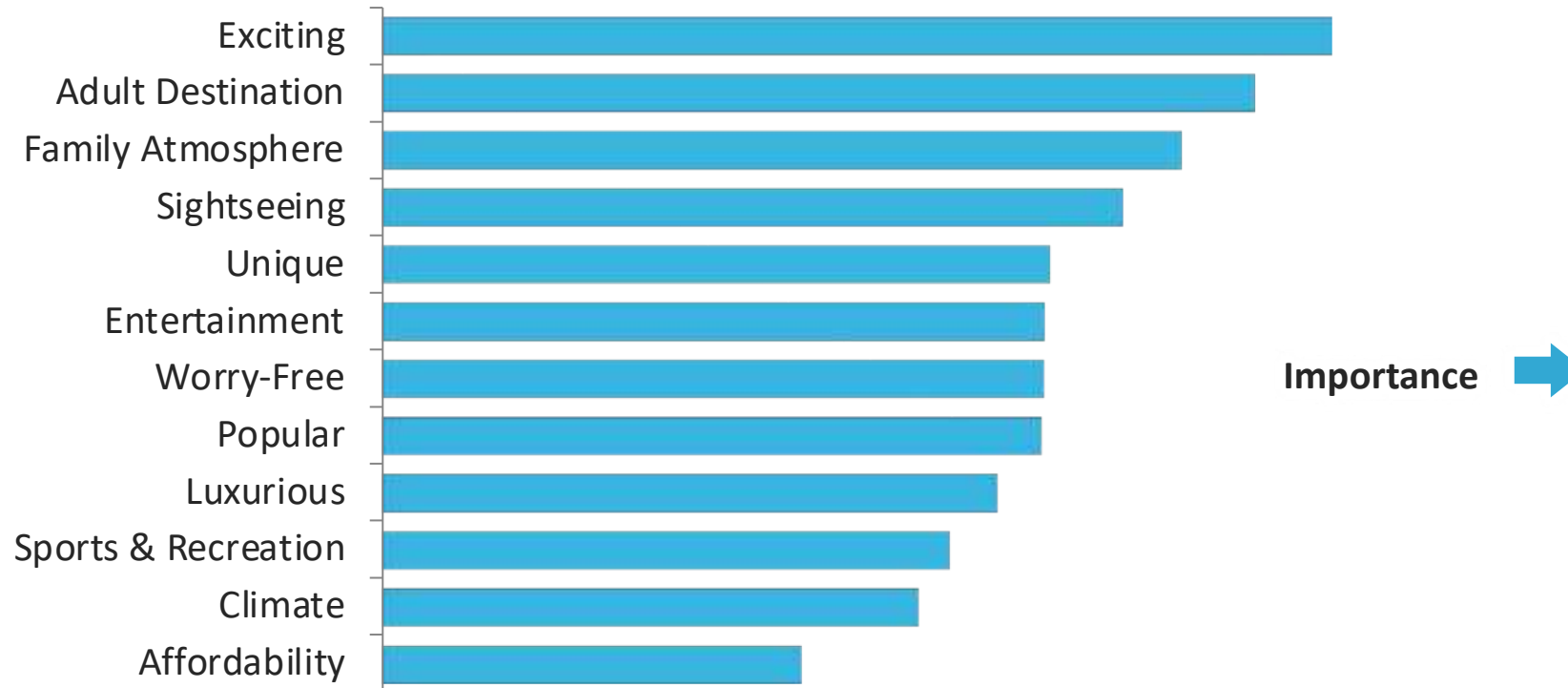
# Travel Motivators

- Among travelers in Kentucky's existing markets, for a destination in this competitive set to get on their consideration list, it must, first and foremost, be perceived to:
  - Be **exciting** – being seen as exciting means being a must-see place to visit, offering a real sense of fun, excitement, and adventure.
  - Be suitable for **adults** and couples.
  - A great **family atmosphere** – good destination for families that children would enjoy visiting.
- There are several factors that individually are of moderate importance, but in combination define the excitement and suitability for adults that attracts vacationers to a destination:
  - Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, parks, museums, etc.
  - **Uniqueness**, including the scenery, culinary scene, people, and distilleries.
  - The opportunities for **entertainment**, e.g., fairs, live music, nightlife, theater etc.
  - A safe, welcoming, and **worry-free** environment.
  - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising for this destination?

# Travel Motivators (Cont'd)

- Lower priorities are:
  - The availability of **luxurious** accommodations, dining, and spas.
  - **Sports and recreation**, including bicycling, hiking, water sports such as swimming and kayaking/rafting, and other outdoor recreation.
  - **Climate**.
  - **Affordability**.
- The Hot Buttons, or ten individual Image attributes most closely tied to destination selection in Kentucky's existing markets, are: a fun place; a must see destination; an interesting place; an exciting place; good for couples; good for an adult vacation; a real adventure; lots to see and do; children would enjoy; and great for sightseeing.

# Travel Motivators



\*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

# Top 10 Hot Buttons

---

## Hot Buttons

A fun place

Must see destination

Is an interesting place

An exciting place

Good for couples

Good for an adult vacation

A real adventure

Lots to see and do

Children would enjoy

Great for sightseeing

---

**KY** **Kentucky Tourism** Sponsored · 🌐

Explore Kentucky's charming horse country with a tour that gets you up close and personal with these majestic champions.



**Explore Kentucky's Horse Country!**

👍❤️😄 Brenda ... 113 Comments 157 Shares

👍 Like    💬 Comment    ➦ Share

**KY** **Kentucky Tourism** Sponsored · 🌐

Visit the museums, listen to the music, and explore the great outdoors. There's so much to love about Kentucky.



kentuckytourism.com  
**Come see Kentucky for yourself**    [Learn more](#)

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# Advertising Impact on Short-of-Sales Measures

# Advertising Impacts

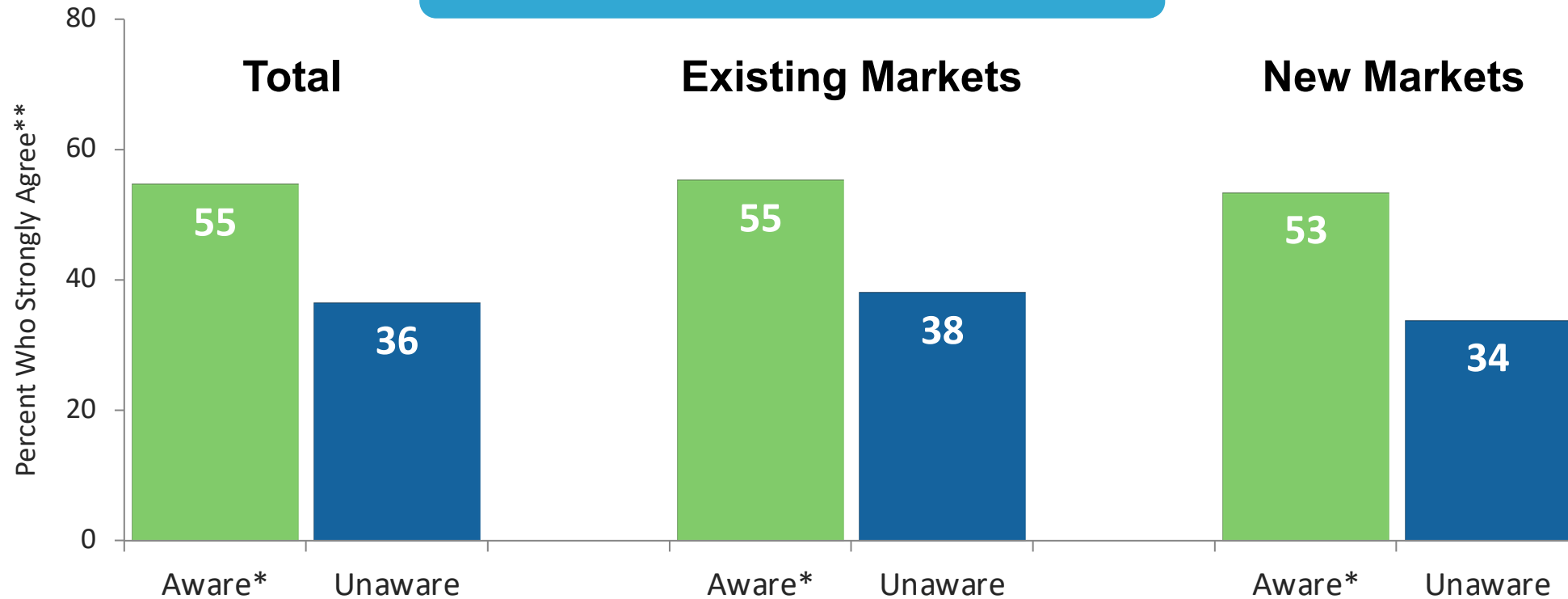
- The campaign had a positive impact on travelers' perceptions of Kentucky:
  - Travelers in Kentucky's existing advertising markets exposed to the campaign gave Kentucky higher rating scores than those unfamiliar with the campaign for the general overall statement "Kentucky is a place I would really enjoy visiting" and the notion that a vacation in Kentucky provides "excellent value for the money."
  - For the more detailed attributes, we find that the campaign did a great job of improving people's perceptions of Kentucky for every image dimension evaluated.
  - For the existing advertising markets, the advertising impacted on perceptions of all ten of the Hot Buttons included in the study, with the following hot buttons showing 17 point or more lift: a real adventure; a fun place; must see destination; children would enjoy; and an exciting place.
  - In fact, there are no variables where significantly more travelers unaware of the advertising rated Kentucky higher than those who were aware of the KDT campaign.



# Advertising Impact on Kentucky's Overall Image

Base: Based on markets where shown

**“A place I’d really enjoy visiting”**



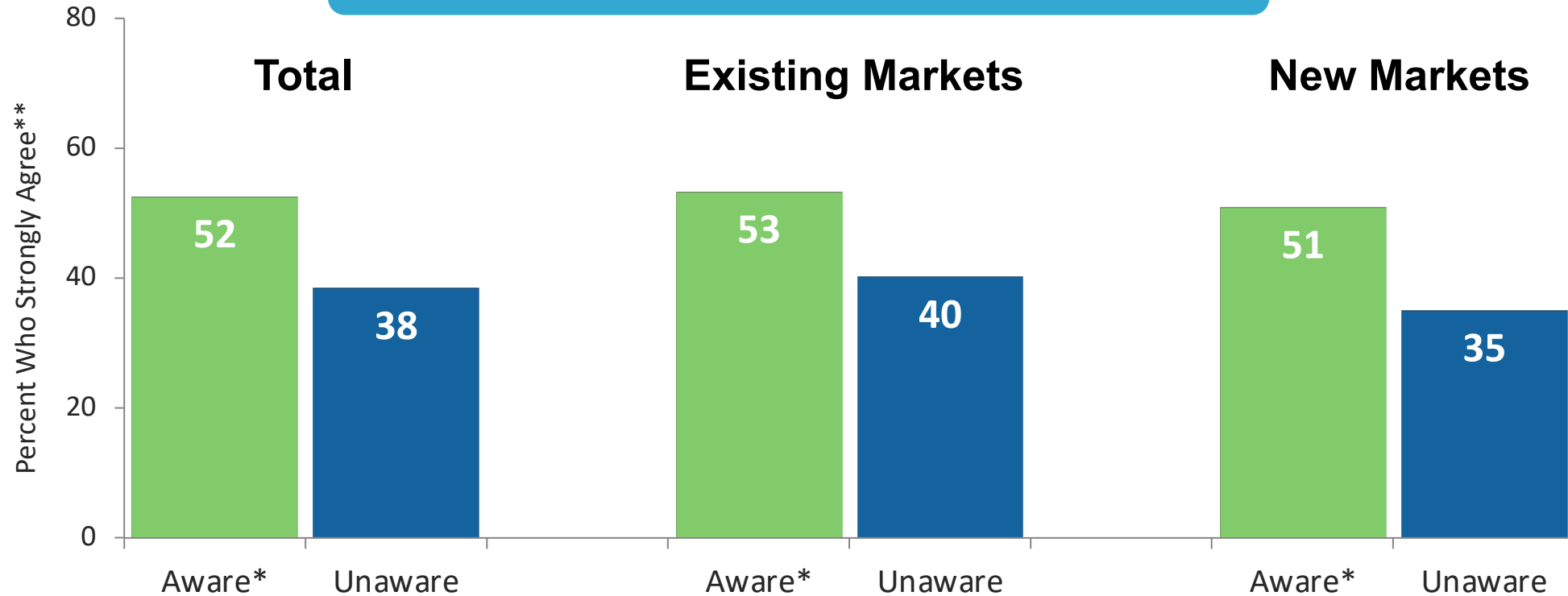
\*Saw at least one ad

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

# Advertising Impact on Kentucky's Overall Image

Base: Based on markets where shown

**“Excellent vacation value for the money”**

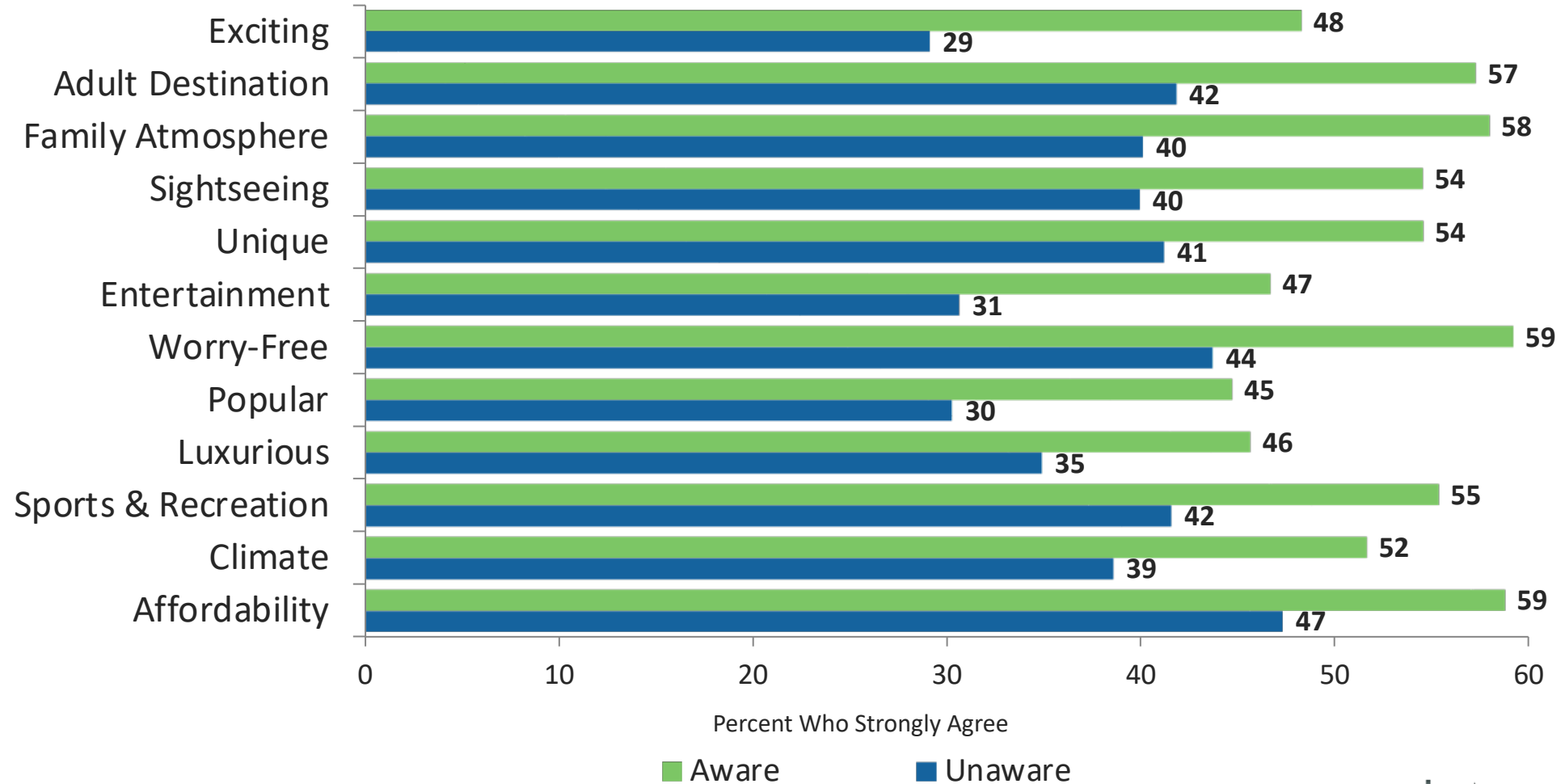


\*Saw at least one ad

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

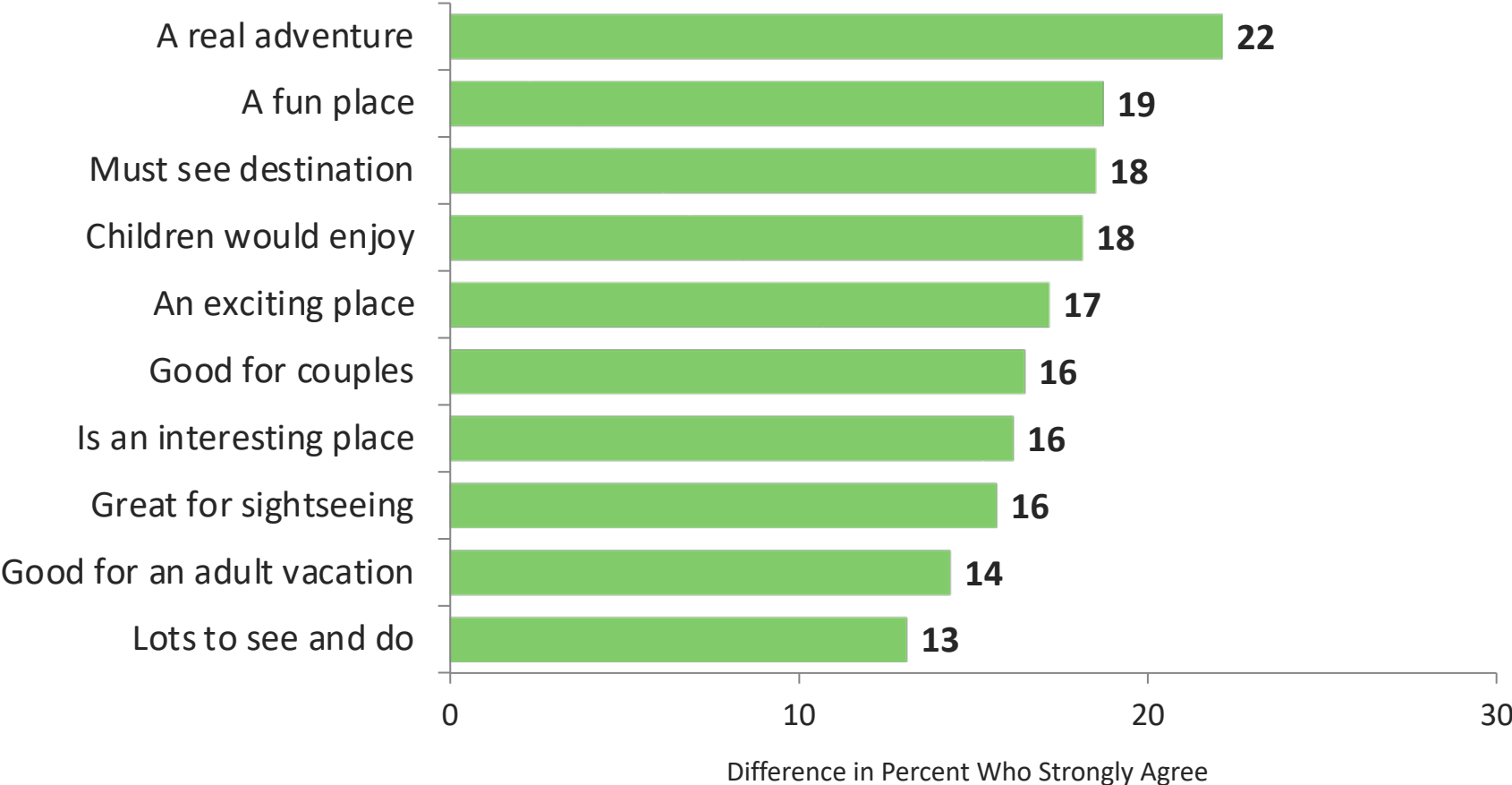
# Advertising Impact on Kentucky's Image

Base: Existing Markets

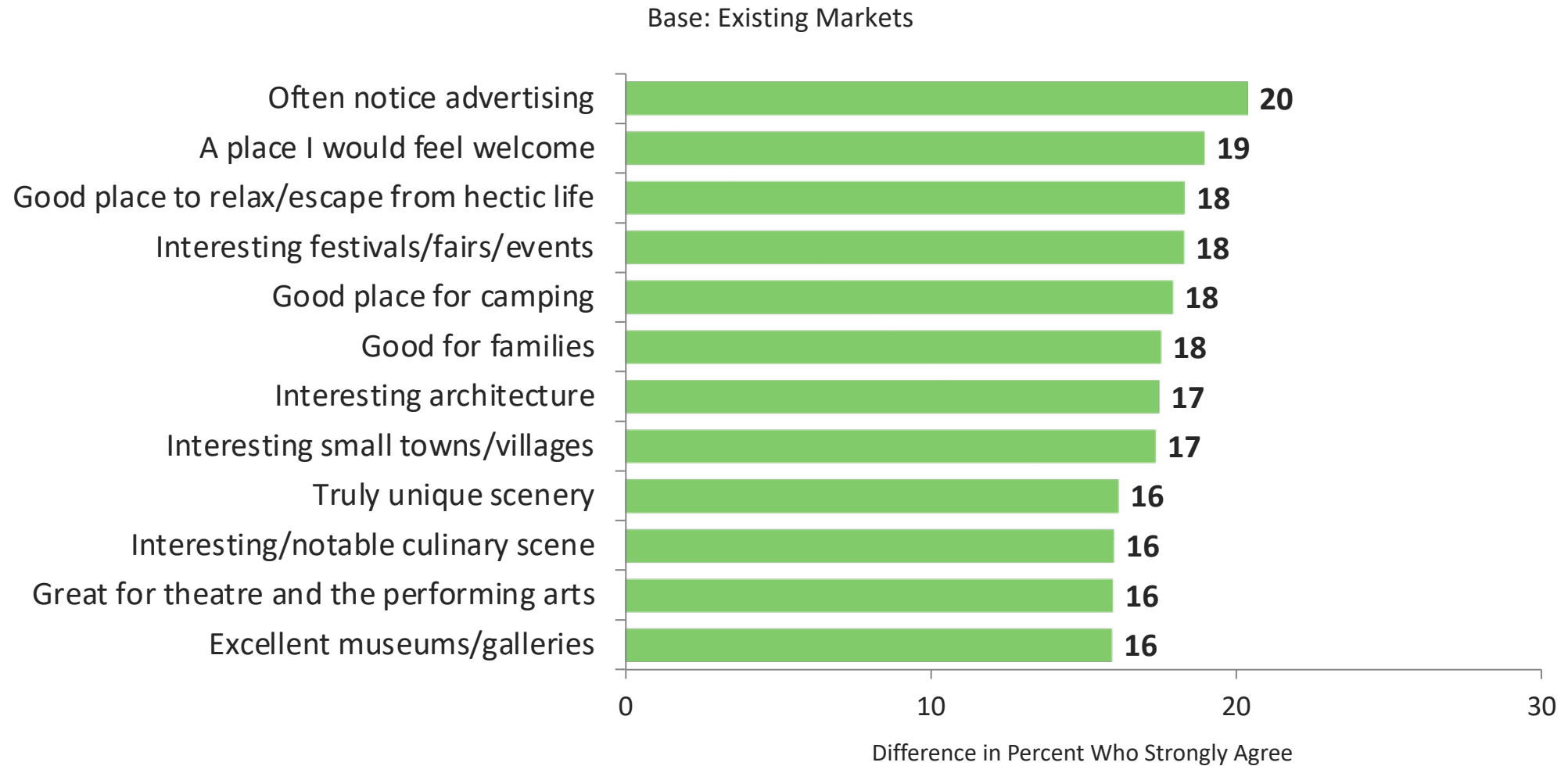


# Hot Buttons Most Impacted by Advertising

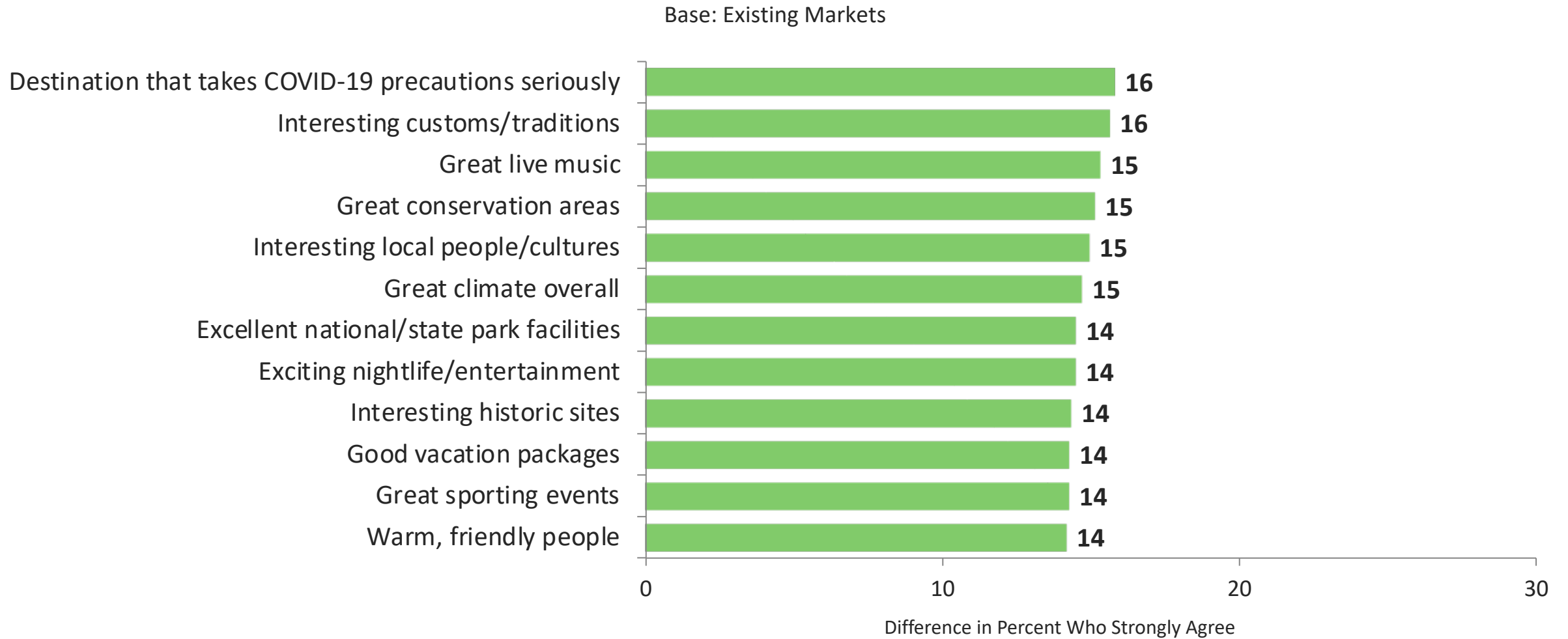
Base: Existing Markets



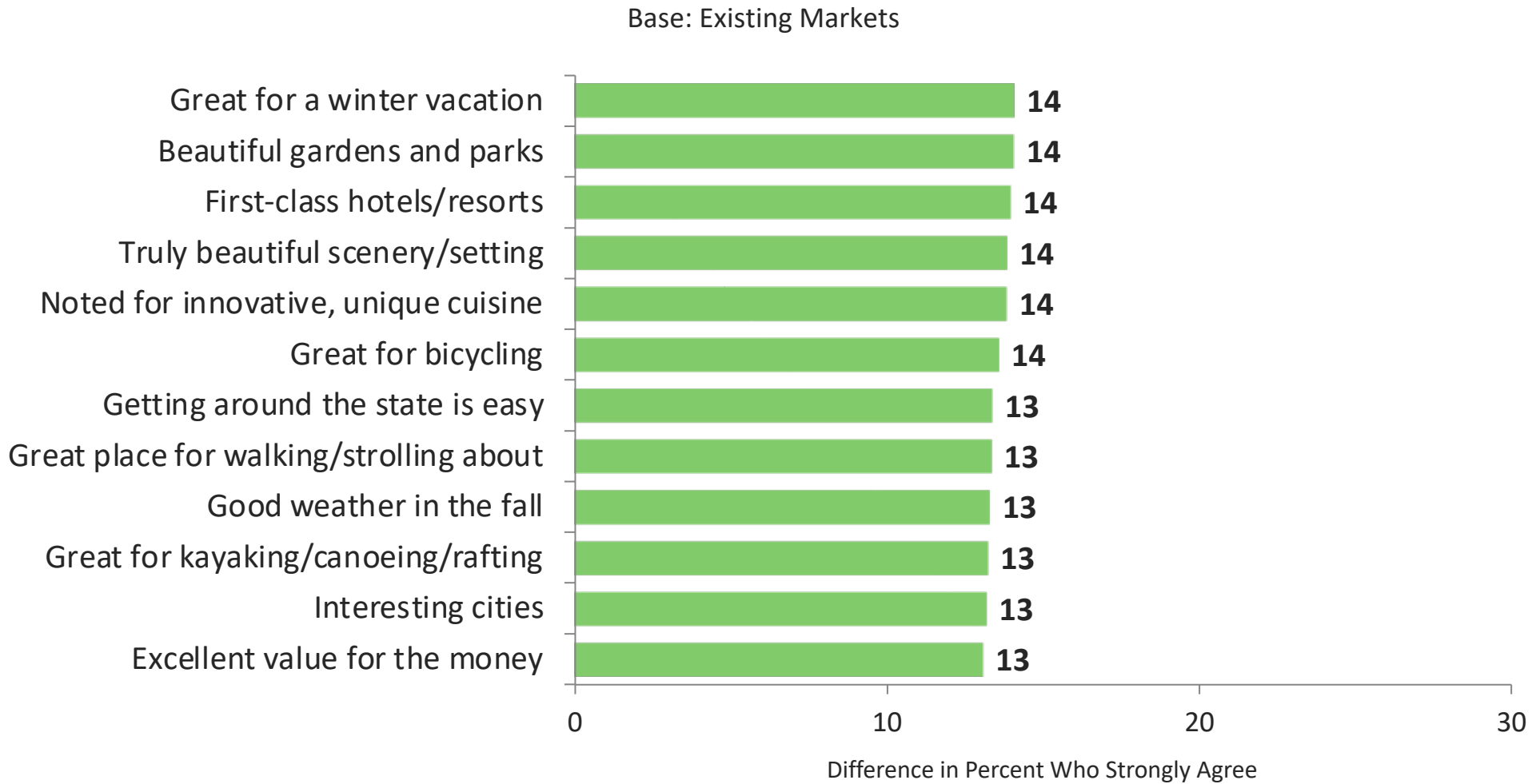
# Image Attributes Most Impacted by Advertising



# Image Attributes Most Impacted by Advertising (Cont'd)

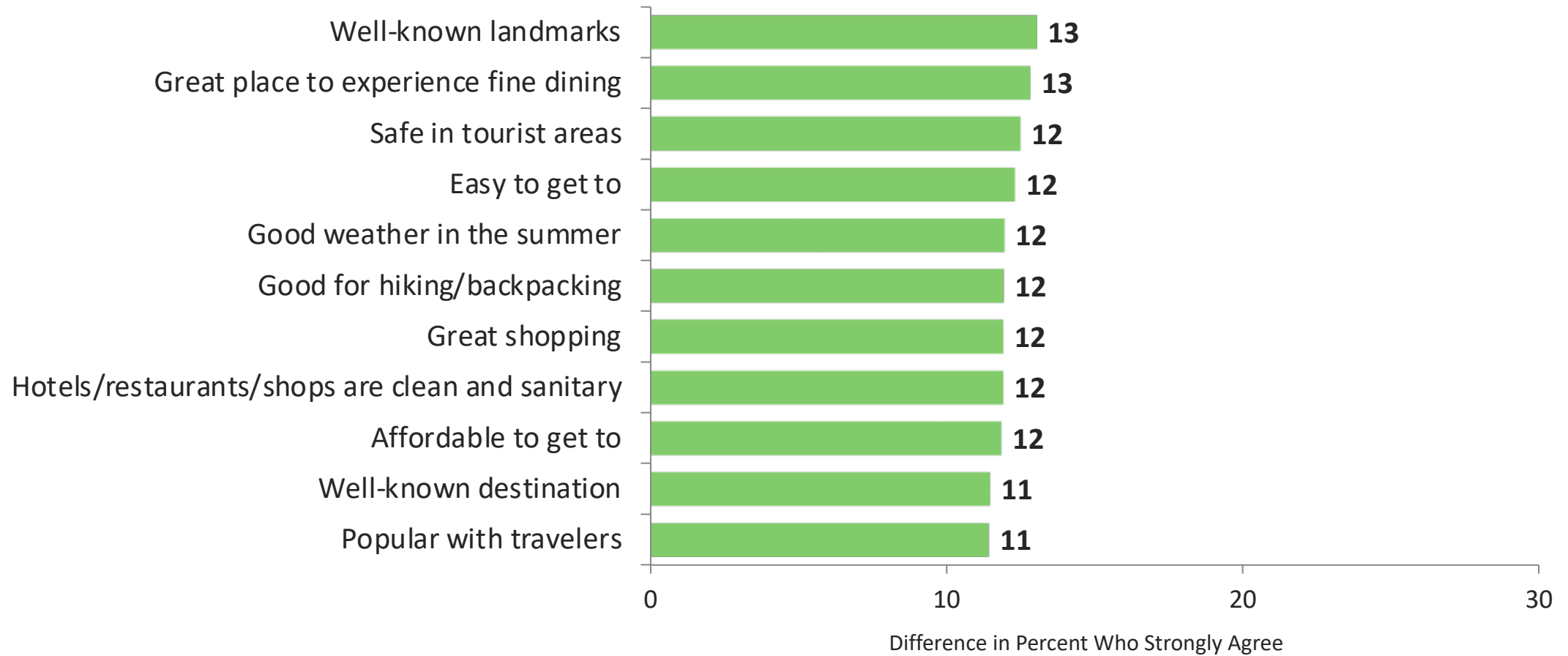


# Image Attributes Most Impacted by Advertising (Cont'd)



# Image Attributes Most Impacted by Advertising (Cont'd)

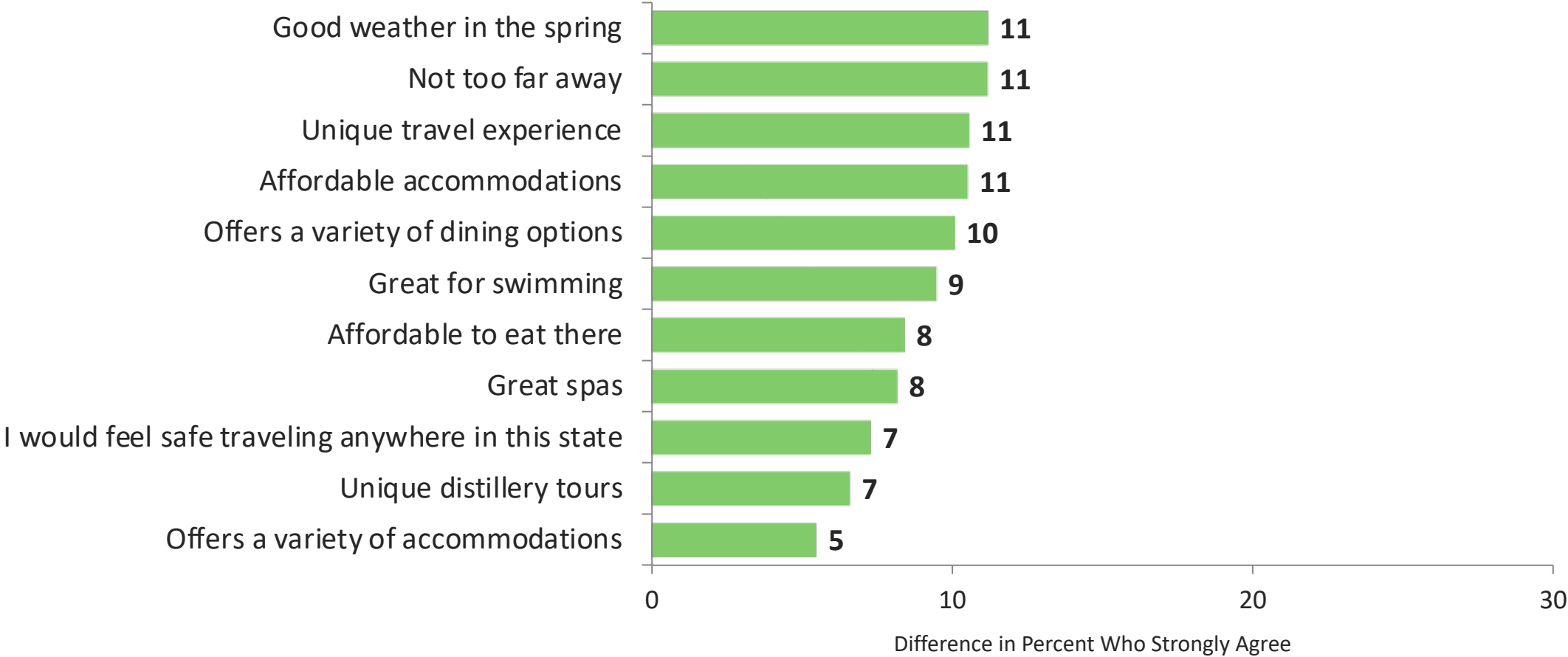
Base: Existing Markets





# Image Attributes Most Impacted by Advertising (Cont'd)

Base: Existing Markets





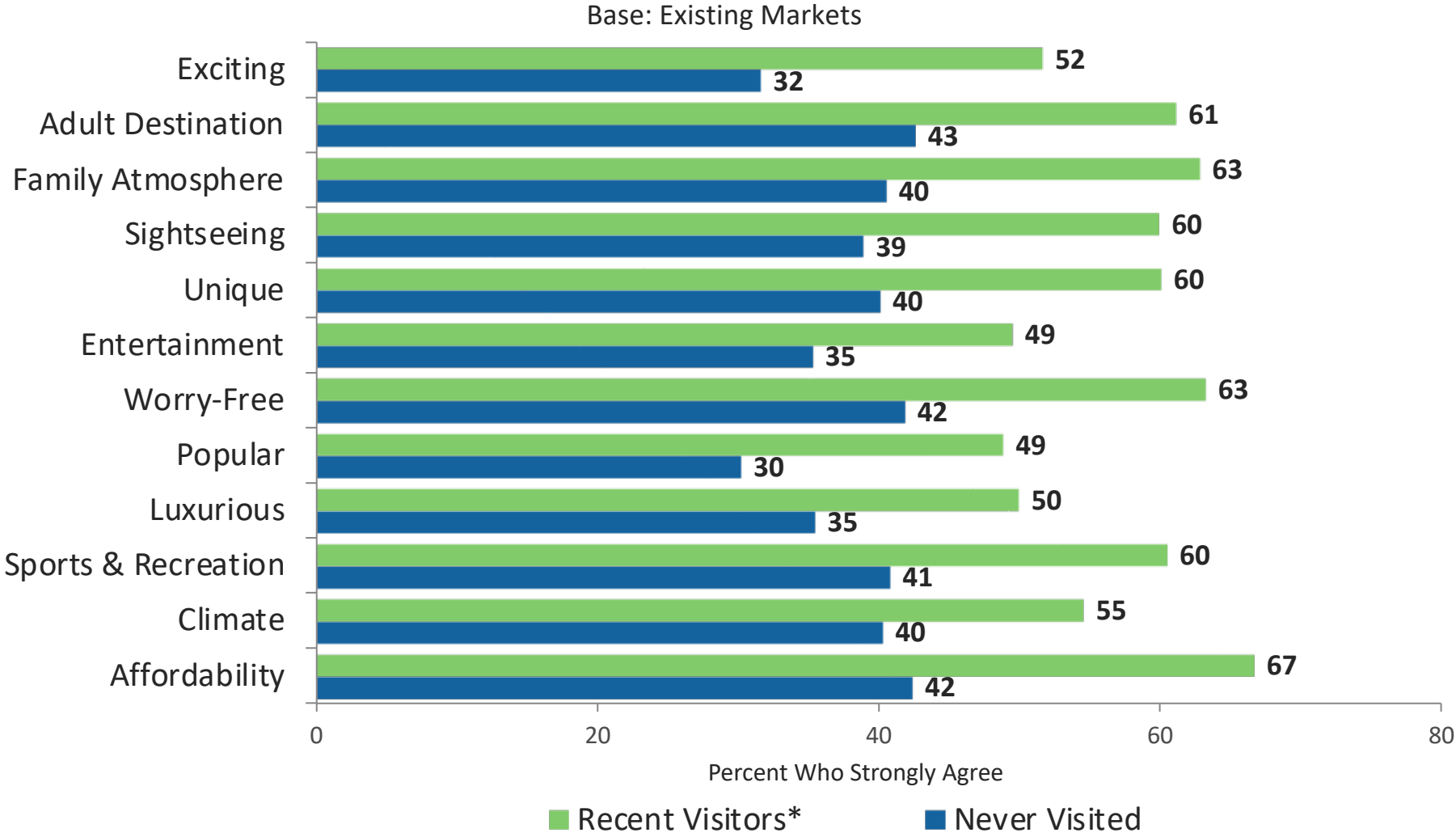
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## Kentucky's Product Delivery

# Product Delivery

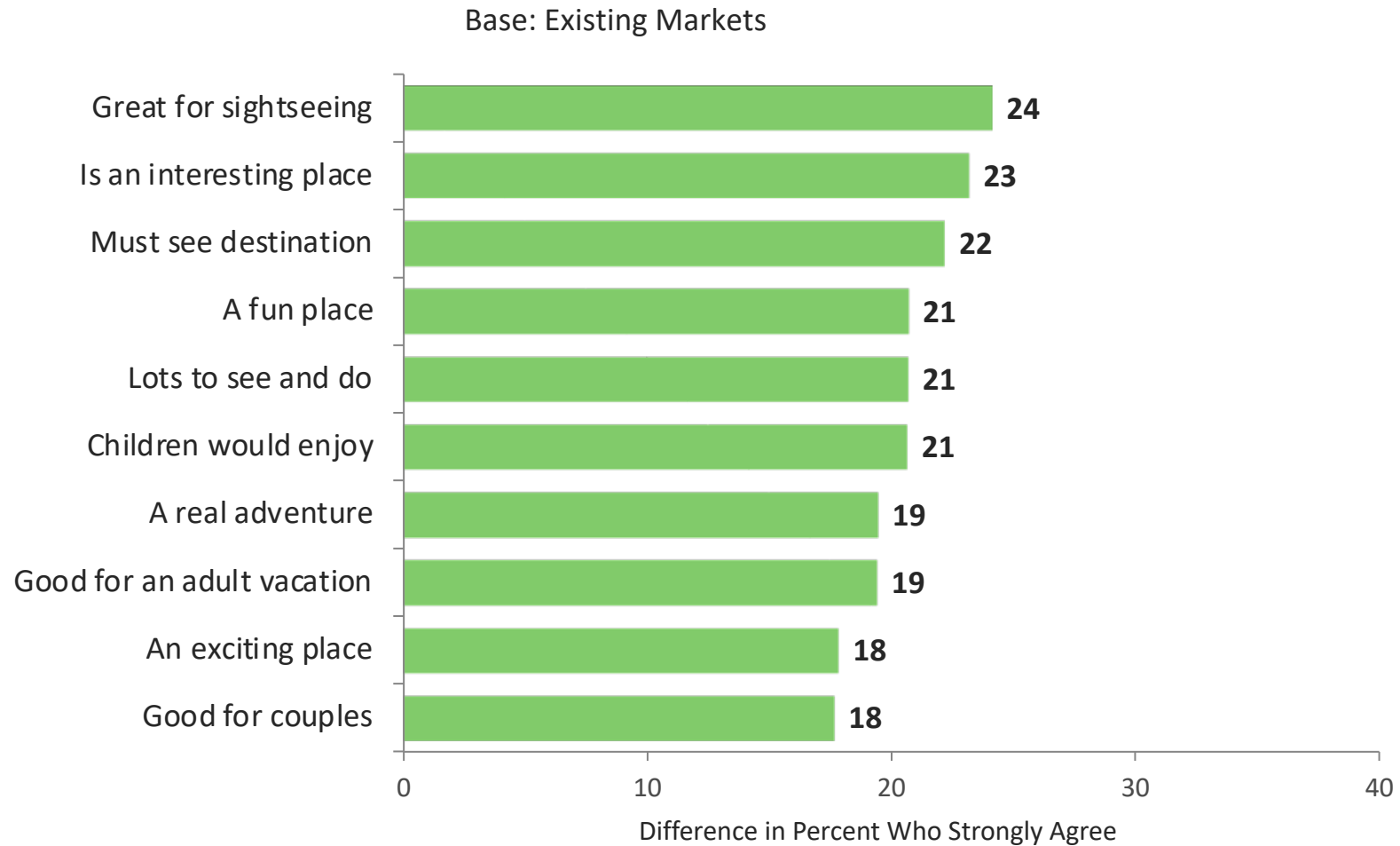
- When we compare the image ratings of travelers who have not visited Kentucky recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.
- From this analysis we find that recent visitation from the state’s existing markets positively impacted the perceptions Kentucky across all ten Hot Button attributes included in the study, with the following having a lift of over 20 points:
  - Great for sightseeing
  - Is an interesting place
  - Must see destination
  - A fun place
  - Lots to see and do
  - Children would enjoy
- Among the dimensions evaluated, there no areas where visitors felt Kentucky failed to live up to expectations.

# Kentucky Product vs. Image

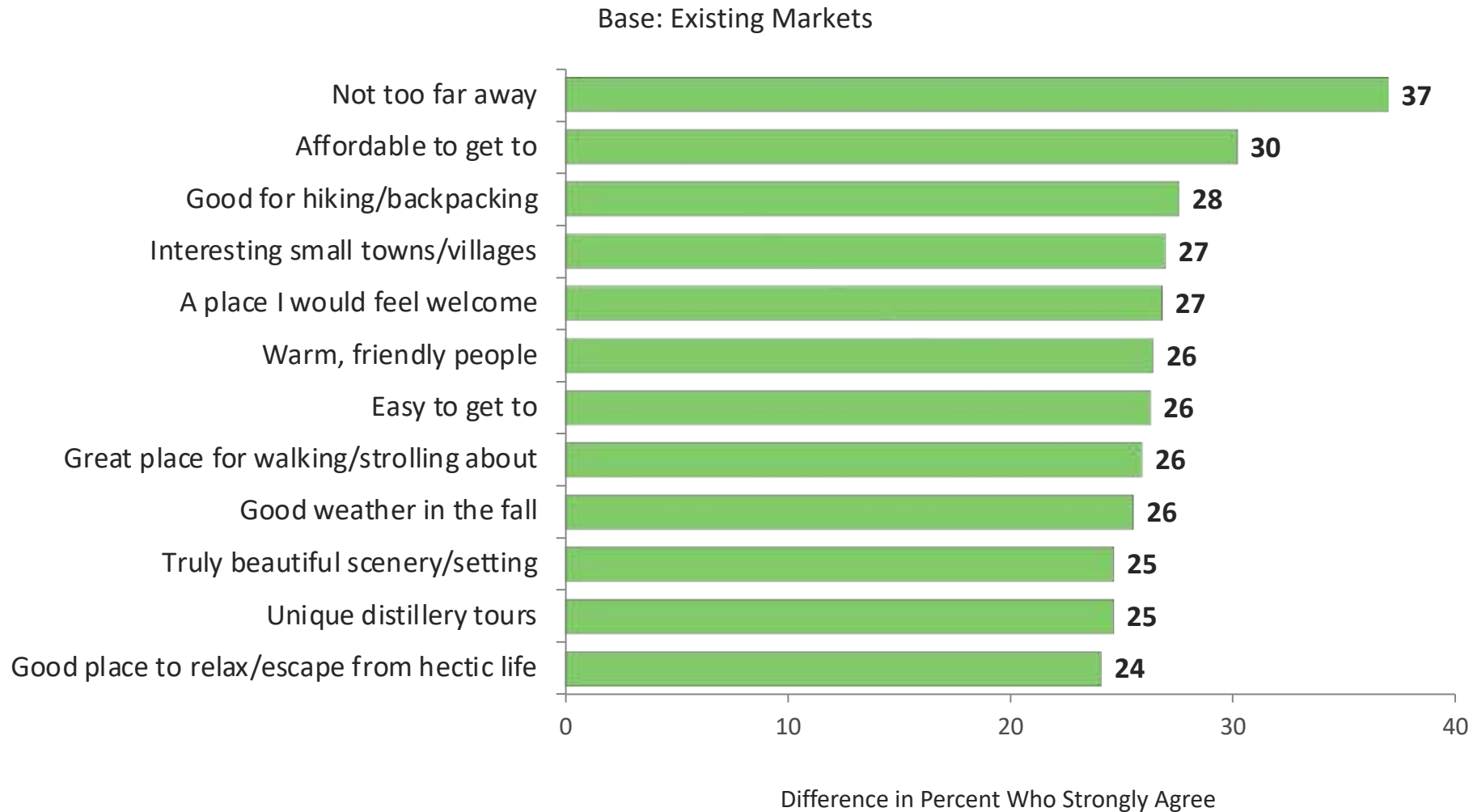


\* Visited in the past 2 years

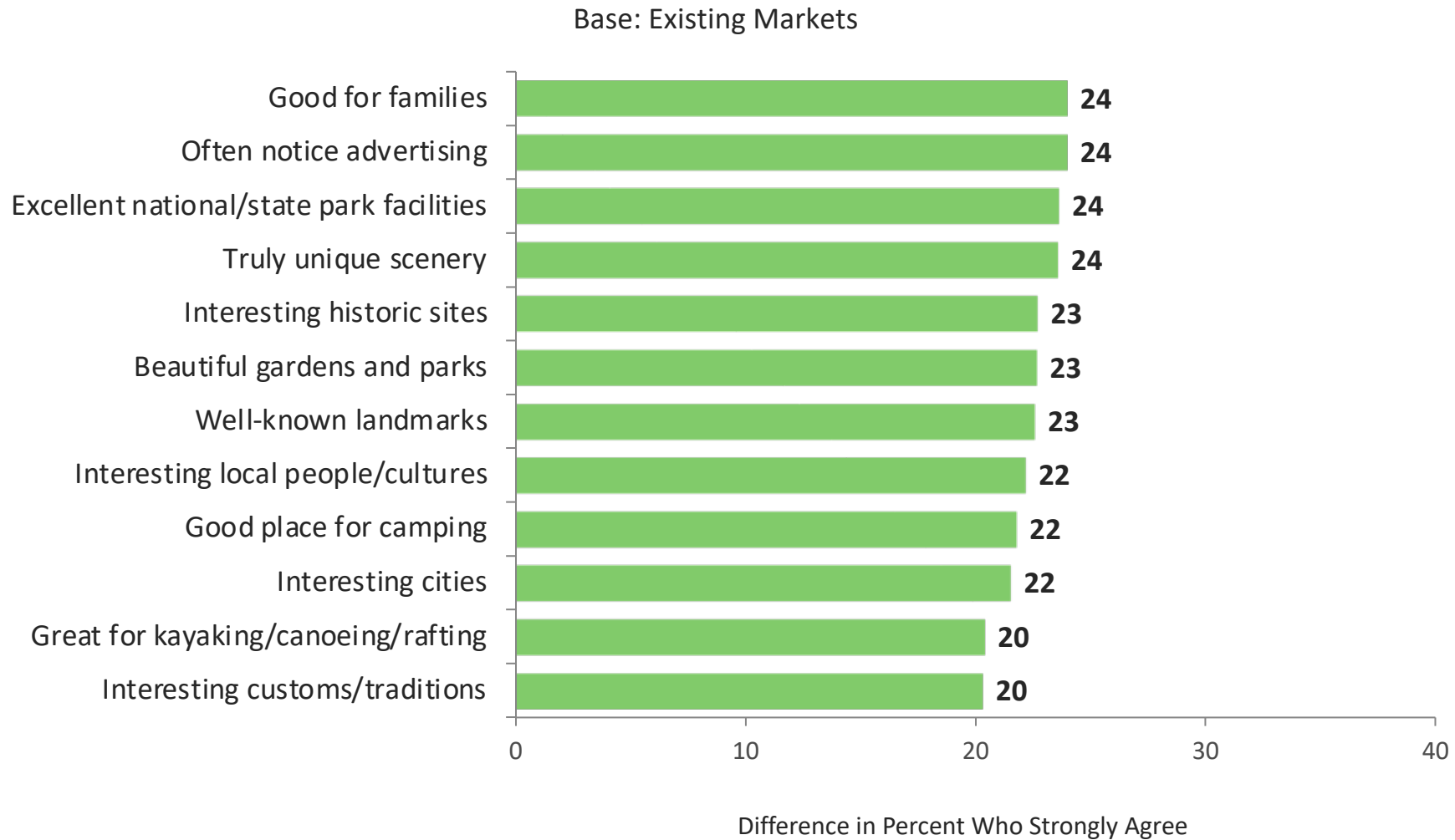
# Top Product Strengths vs. Image – Hot Buttons



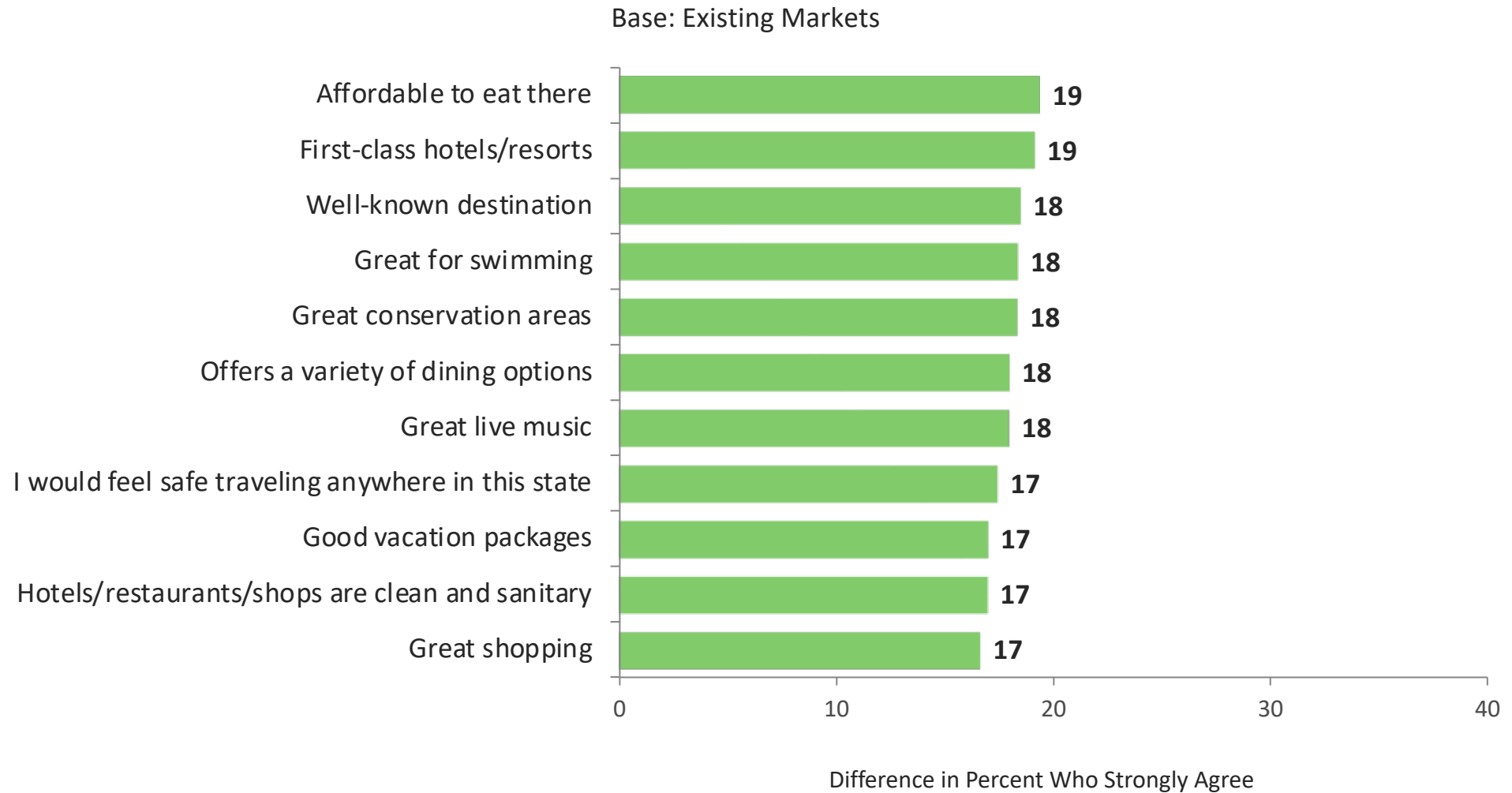
# Top Product Strengths vs. Image



# Top Product Strengths vs. Image (Cont'd)

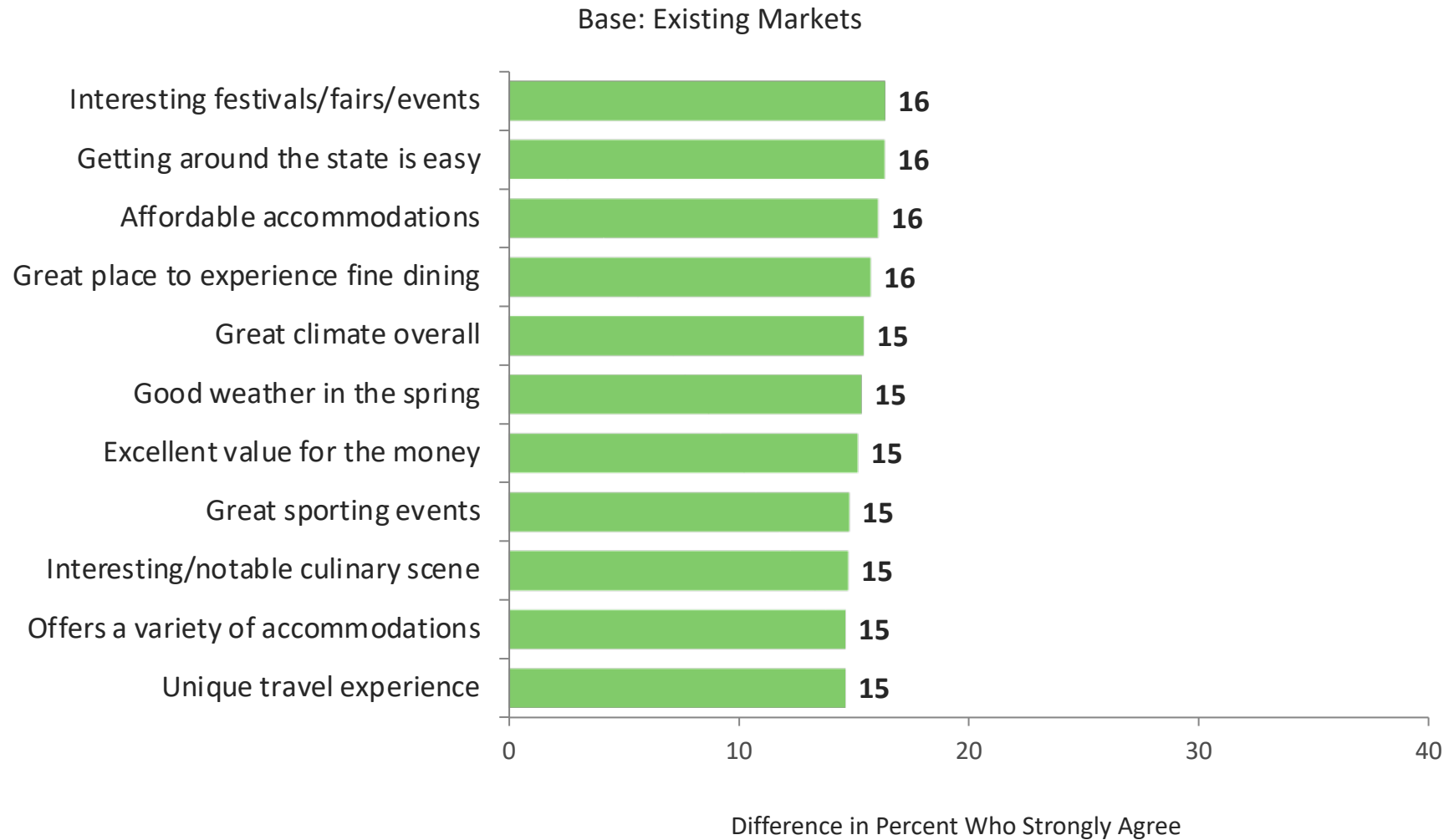


# Top Product Strengths vs. Image (Cont'd)

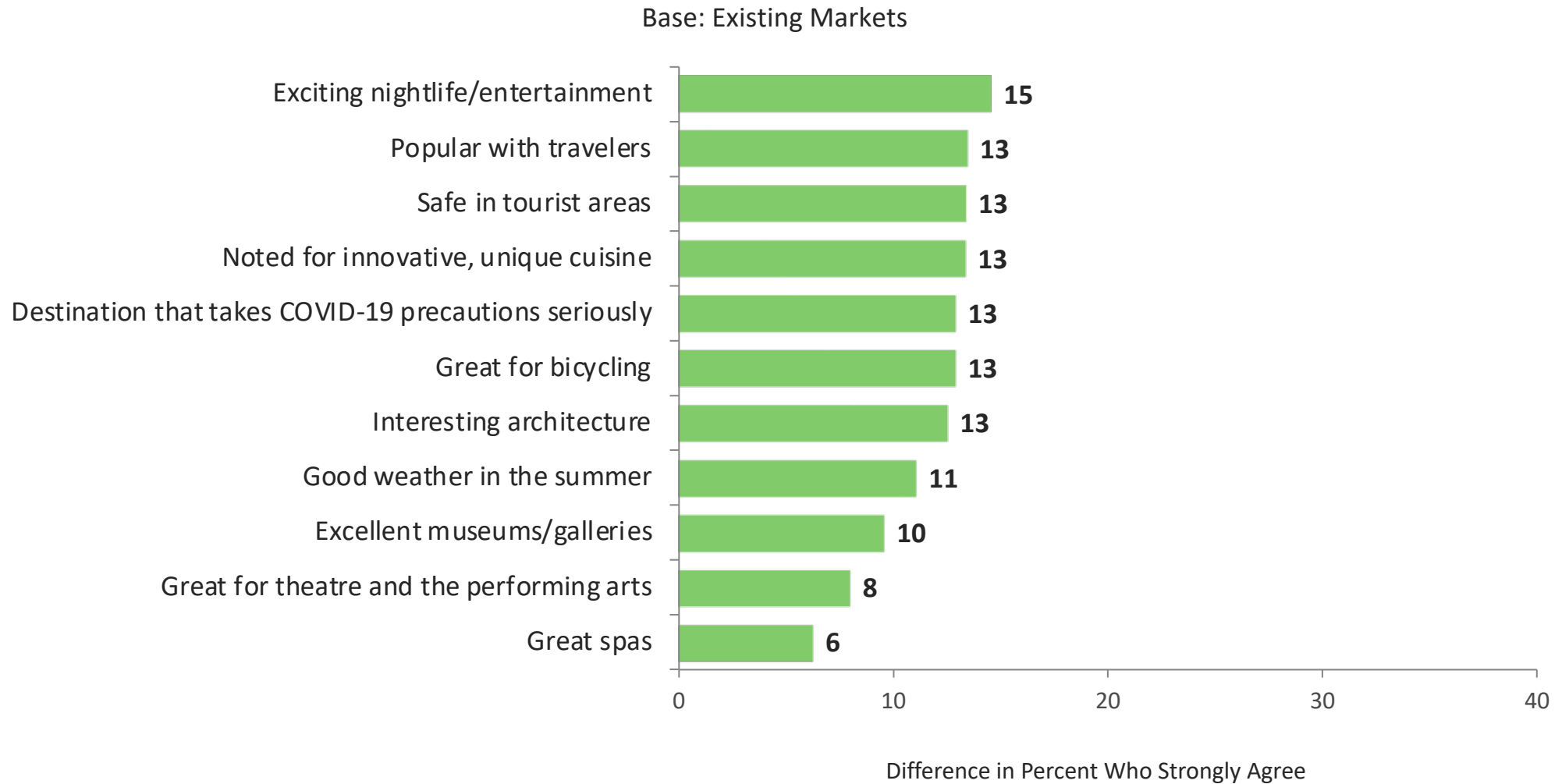




# Top Product Strengths vs. Image (Cont'd)



# Top Product Strengths vs. Image (Cont'd)



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



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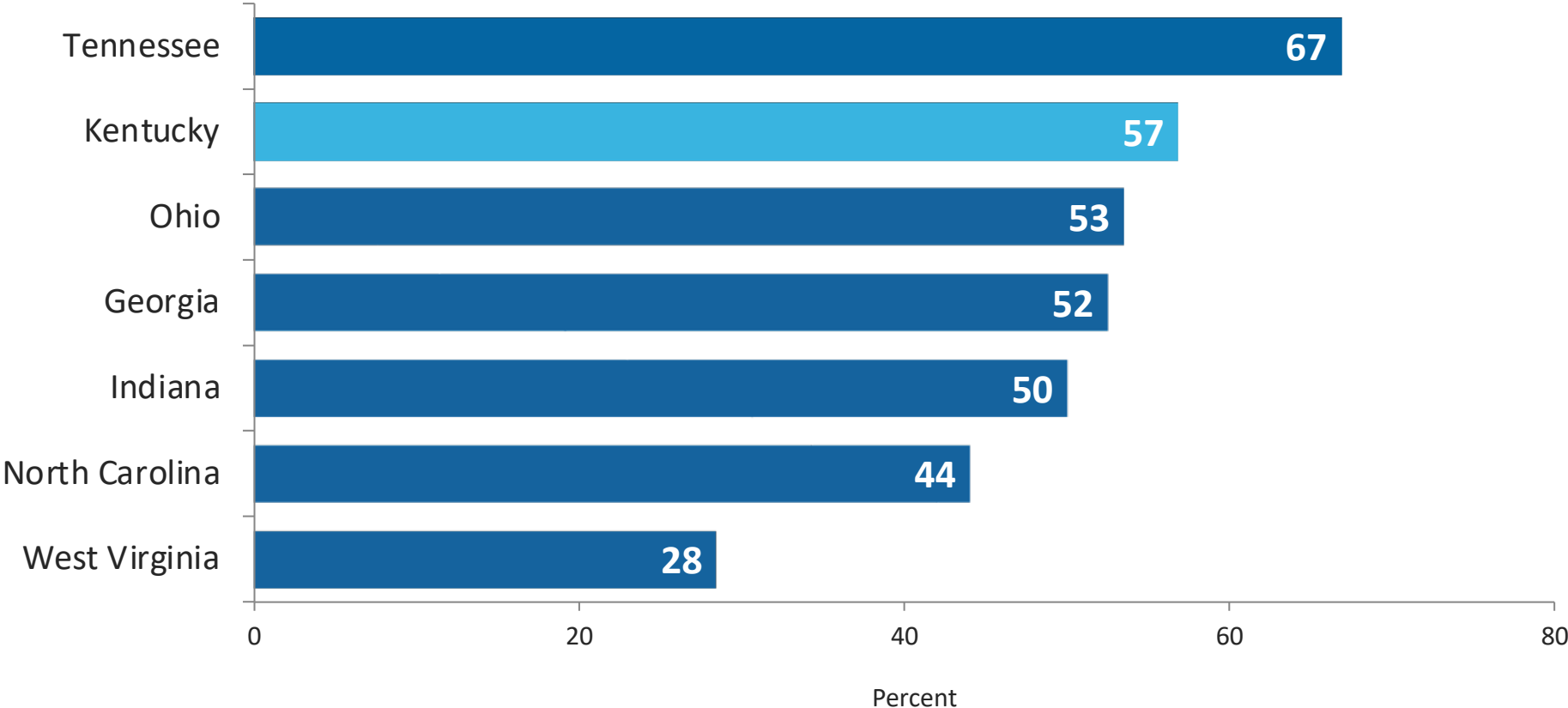
Destination  
Visitation  
& Interest

# Destination Visitation & Intent

- Almost six in ten (57%) travelers within the existing advertising markets have visited Kentucky during their lifetimes.
- Over a third (36%) of travelers within the existing advertising markets have visited Kentucky during the past 2 years
- Almost half (47%) of travelers within the existing advertising markets intend to visit Kentucky during the next 12 months.
- Among travelers who visited Kentucky overnight, the three most popular activities were shopping, outdoor activities, and trying unique/local foods.

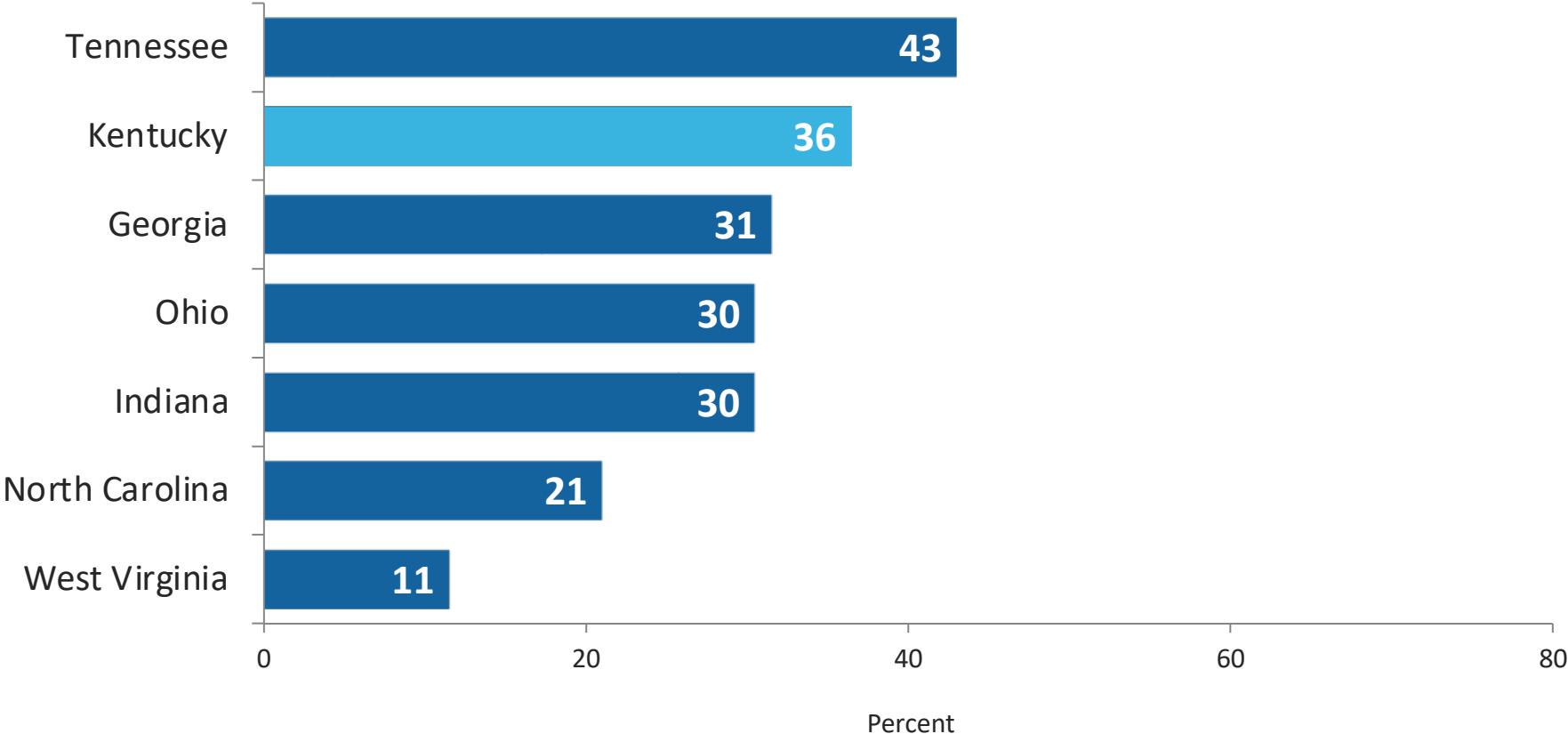
# Destinations Ever Visited

Base: Existing Markets



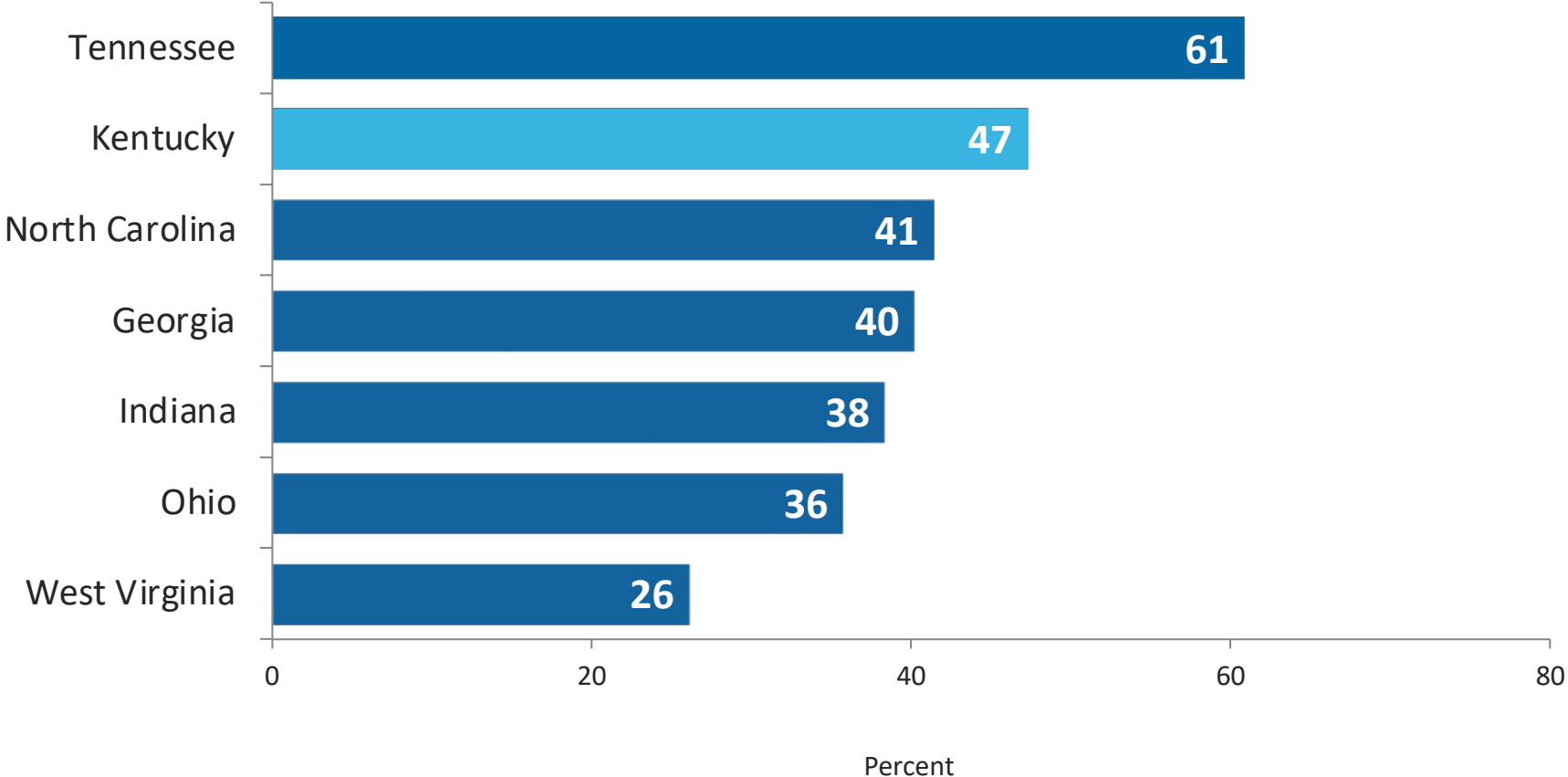
# Destinations Visited in Past 2 Years

Base: Existing Markets



# Destinations Intend to Visit in Next 12 Months

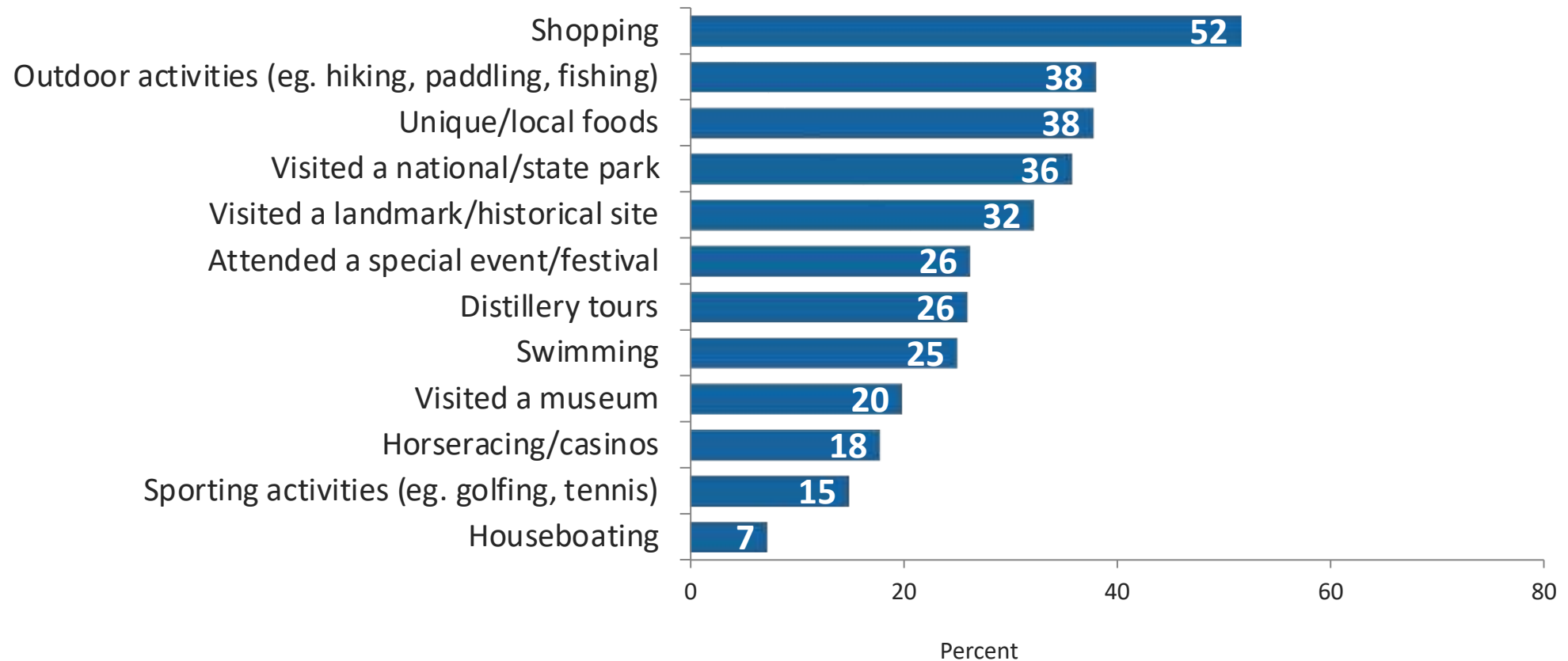
Base: Existing Markets





# Activities Participated on Overnight Trip to Kentucky

Base: Existing Markets





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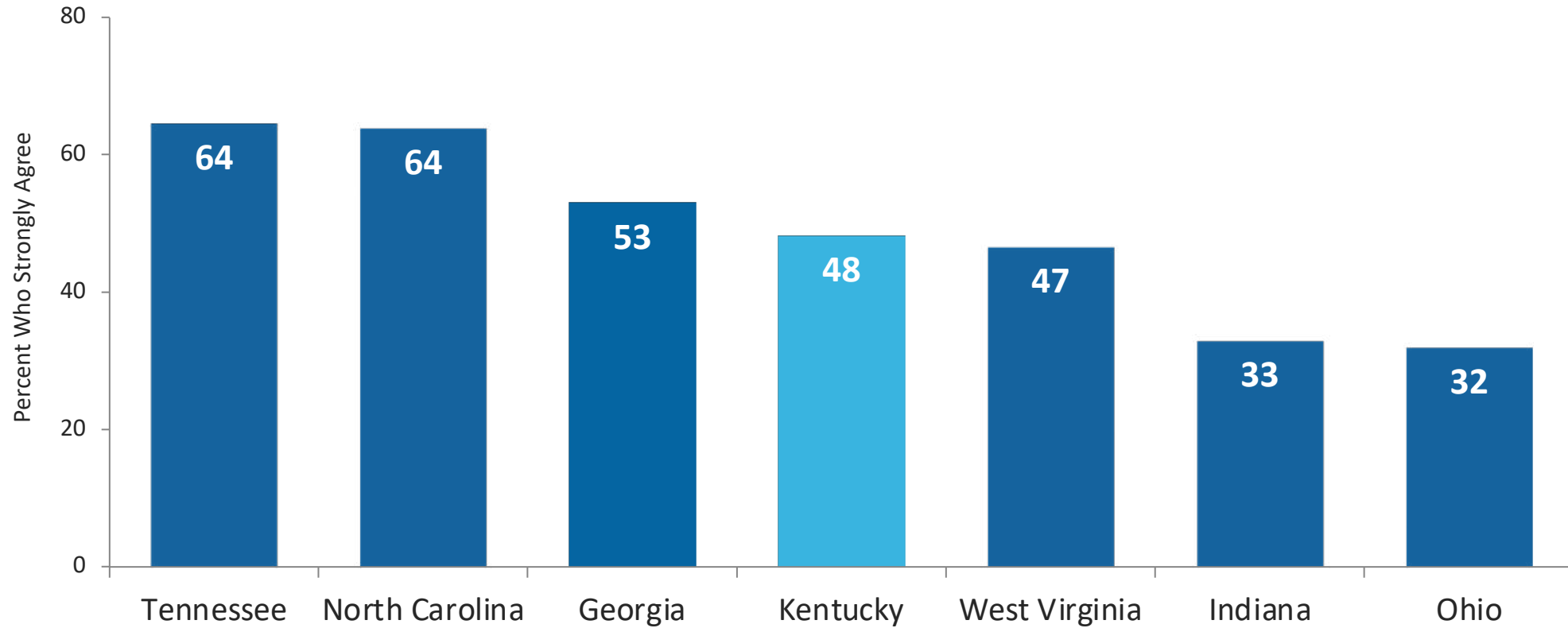
## Kentucky's Image vs. Competition

# Kentucky's Image

- Relative to the other destinations in the competitive set for this study, Kentucky has a positive overall image among travelers in their existing advertising markets:
  - Across the existing markets surveyed, half (48%) rated Kentucky very favorably as a destination they “would really enjoy visiting.”
    - Tied with West Virginia.
    - Ahead of Indiana and Ohio.
    - Behind Tennessee, North Carolina, and Georgia.
- On the other overall image measure, perceptions as being “excellent value for money”, the rank ordering is different:
  - Kentucky (48%) is tied for second with West Virginia.
  - North Carolina, Georgia, Indiana, and Ohio trail.
  - Behind Tennessee.
- When comparing Kentucky's image versus the image of the combined competition, Kentucky has nine image strengths, the most notable being unique distillery tours.
- There are six weakness Kentucky had in comparison to the combined competitive set: exciting nightlife/entertainment; great for theatre and the performing arts; first-class hotels/resorts; great place to experience fine dining; great shopping; and popular with travelers.

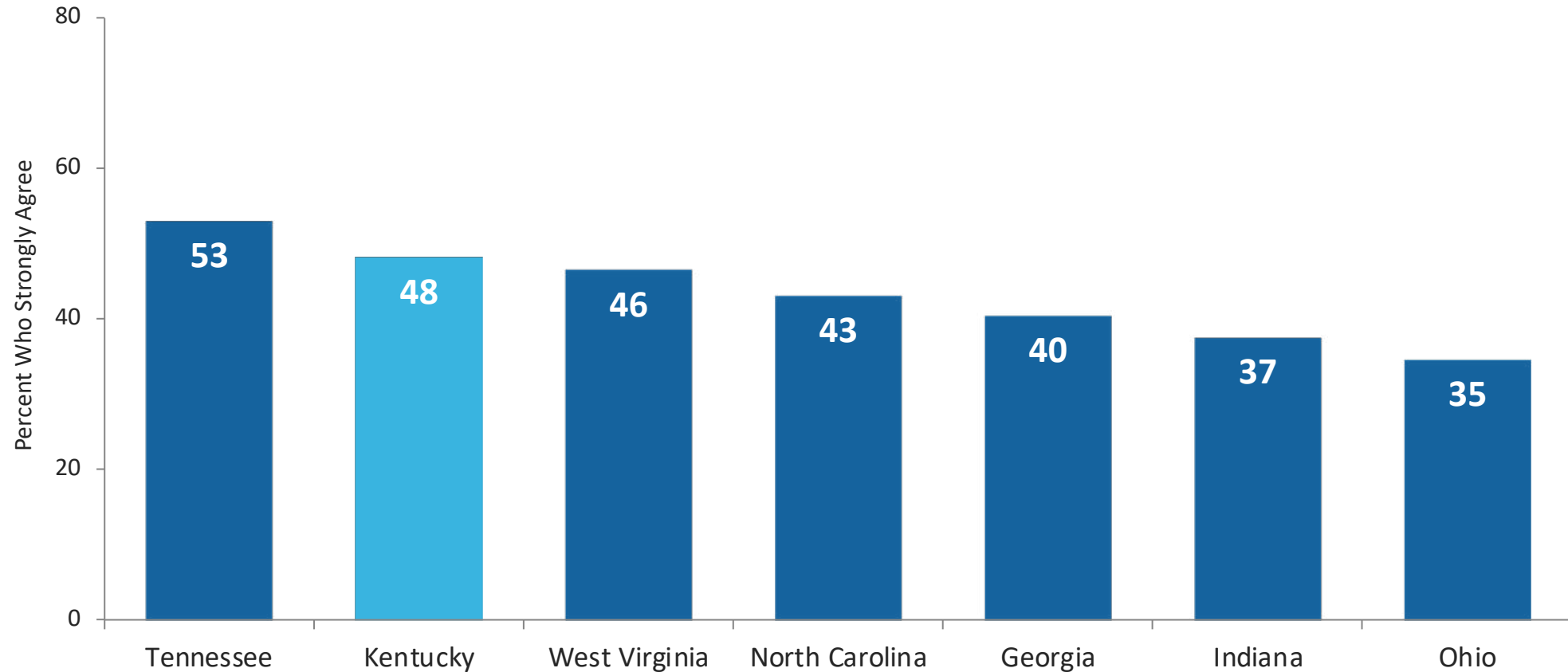
# Kentucky Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”

Base: Existing Markets



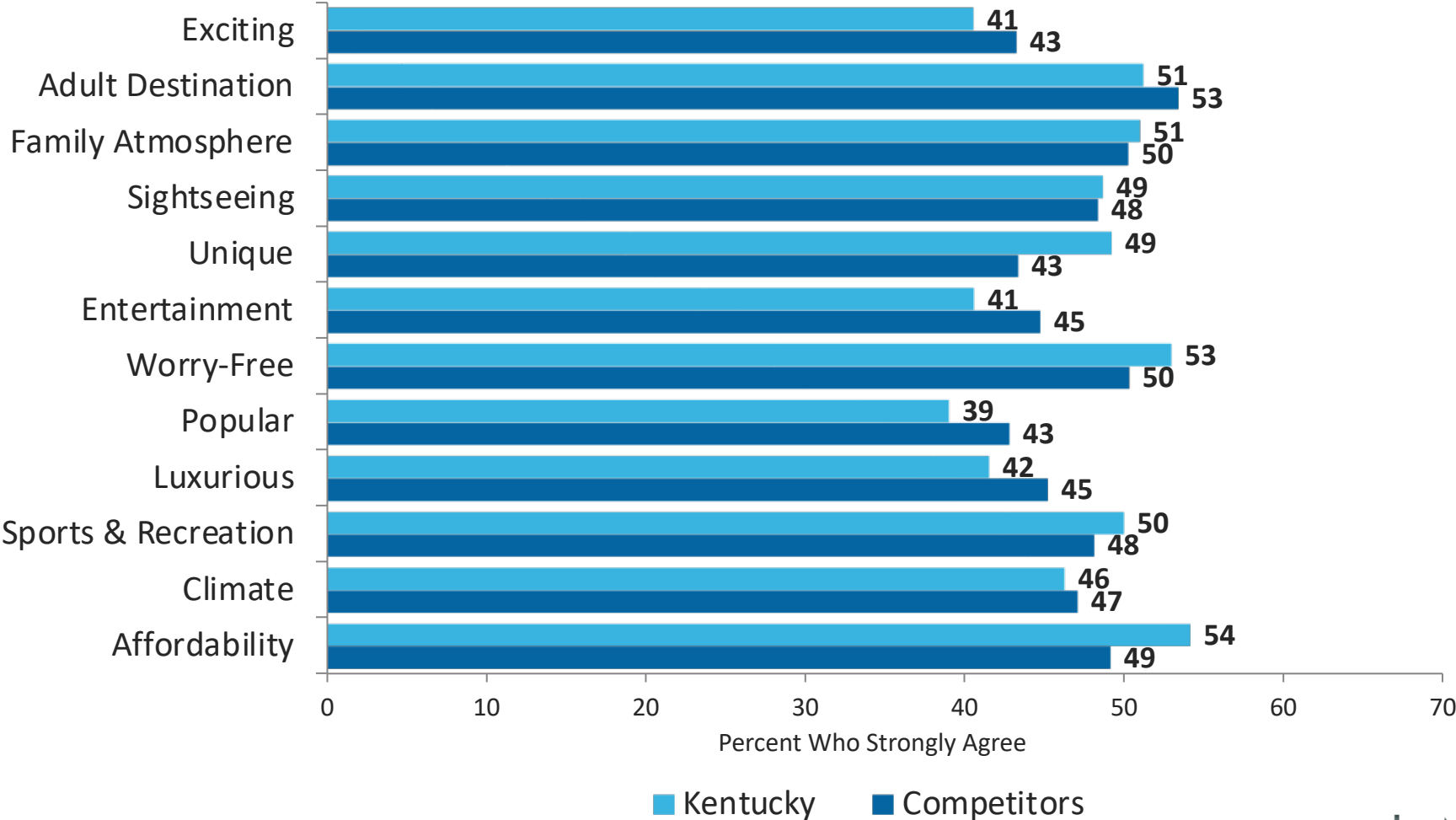
# Kentucky Overall Image vs. Competition — “Excellent Value For the Money”

Base: Existing Markets



# Kentucky's Overall Image vs. Competition

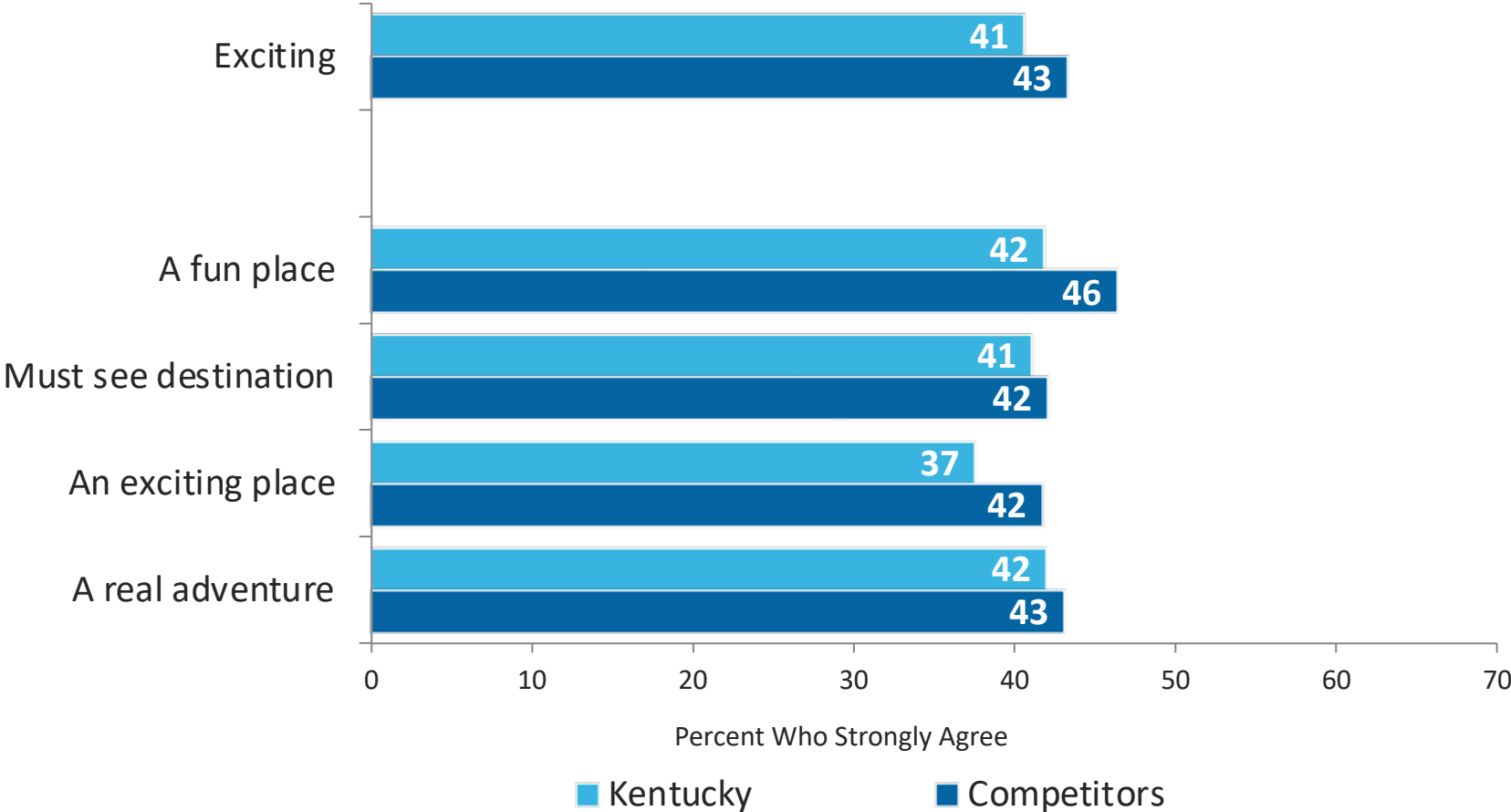
Base: Existing Markets



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

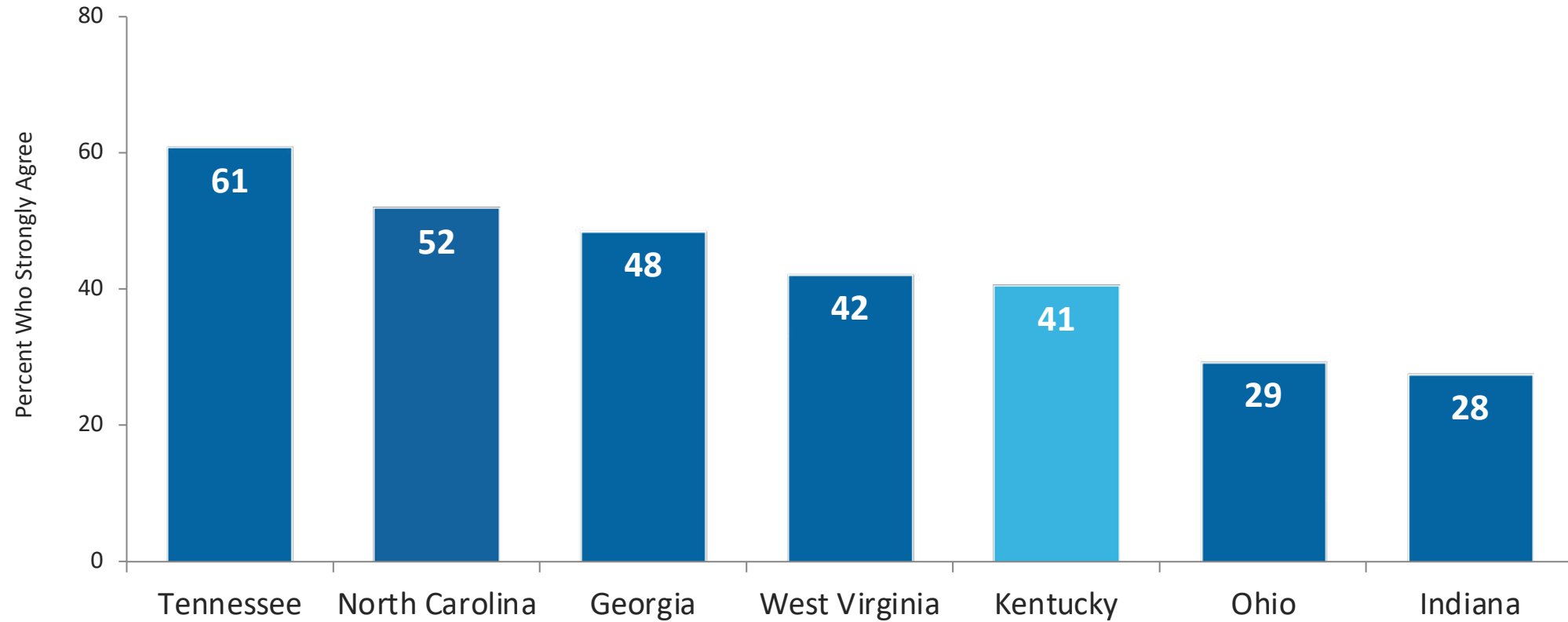
# Kentucky's Image vs. Competition — Exciting

Base: Existing Markets



# Kentucky's Image vs. Competition — Exciting

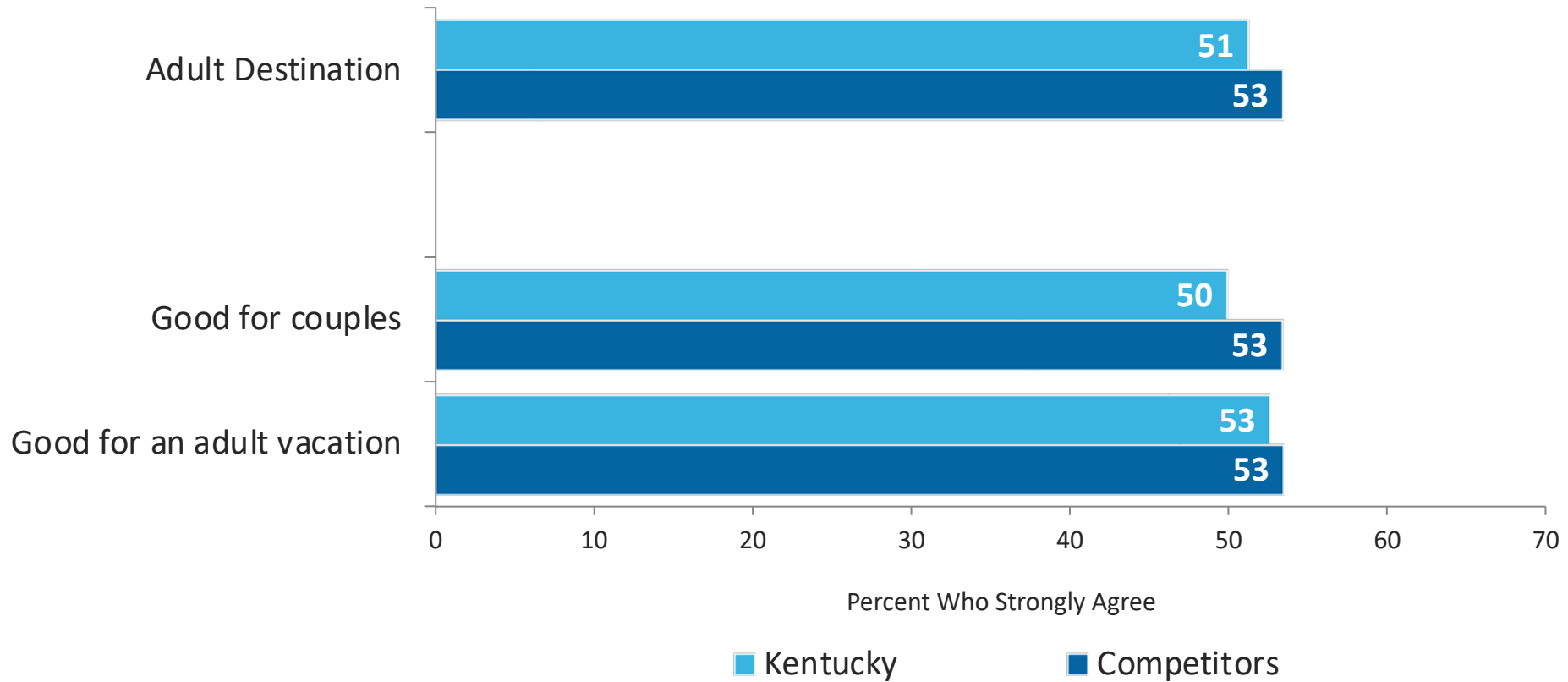
Base: Existing Markets





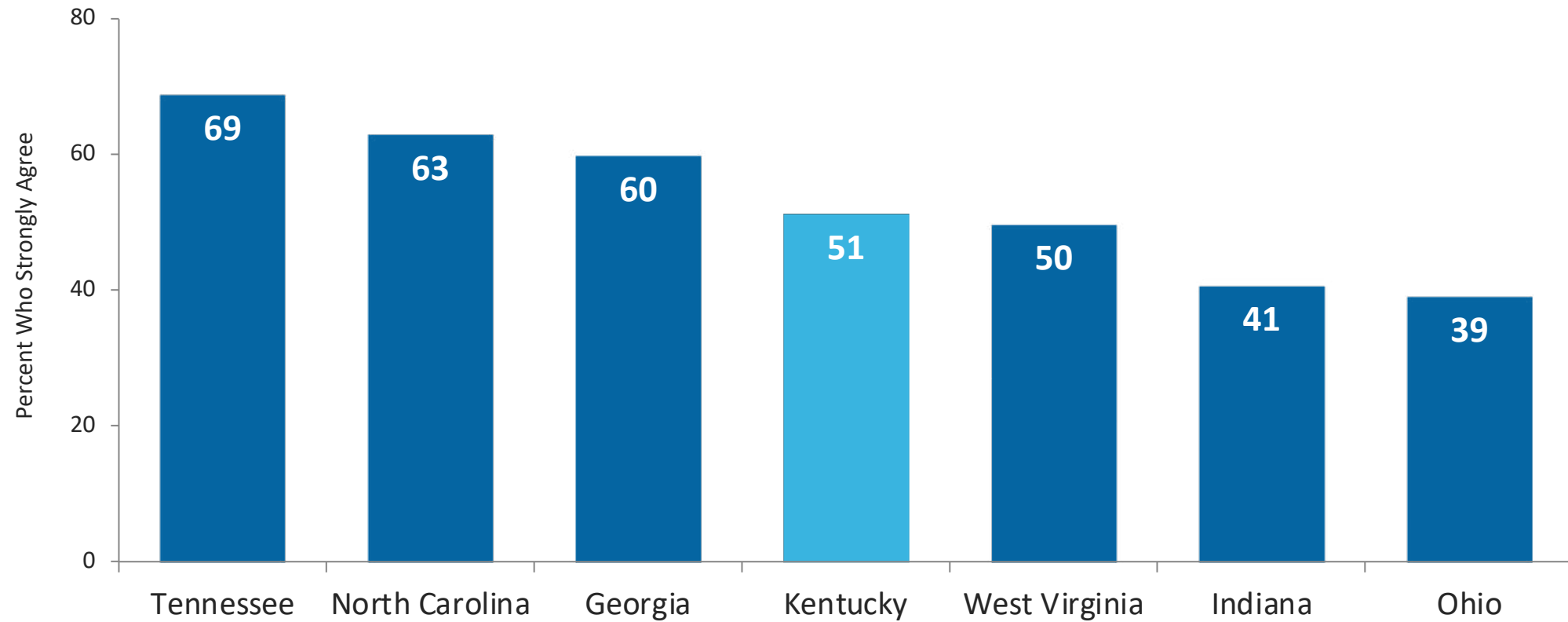
# Kentucky's Image vs. Competition — Adult Destination

Base: Existing Markets



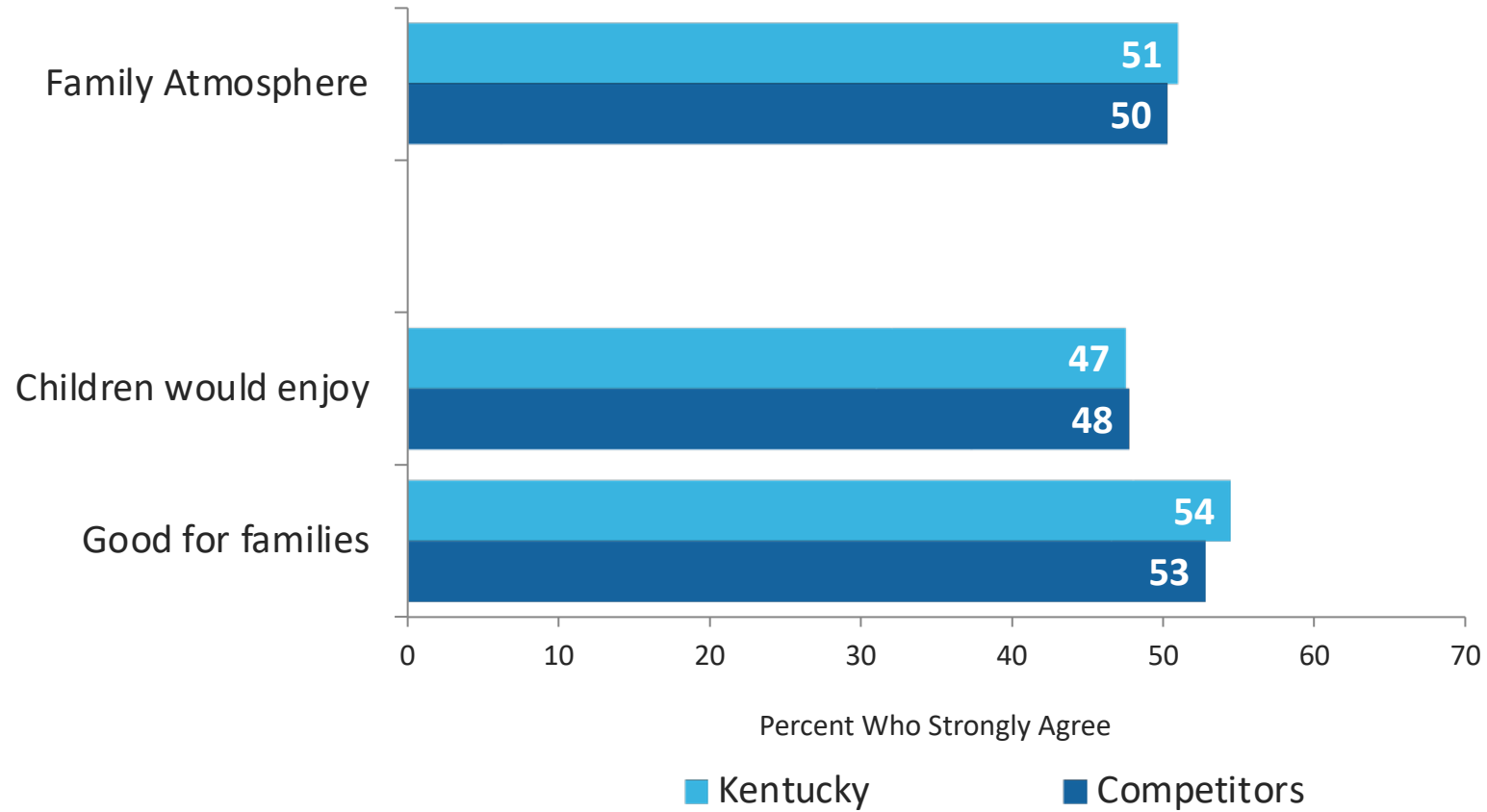
# Kentucky's Image vs. Competition — Adult Destination

Base: Existing Markets



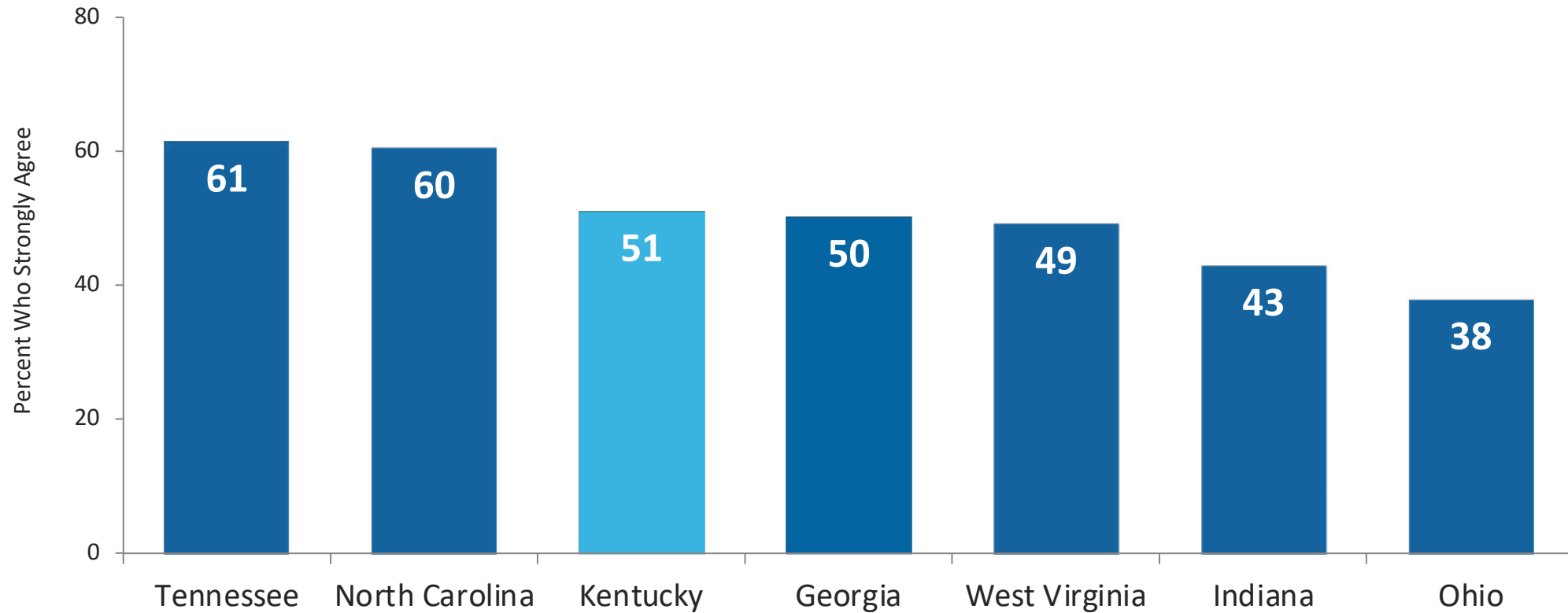
# Kentucky's Image vs. Competition — Family Atmosphere

Base: Existing Markets



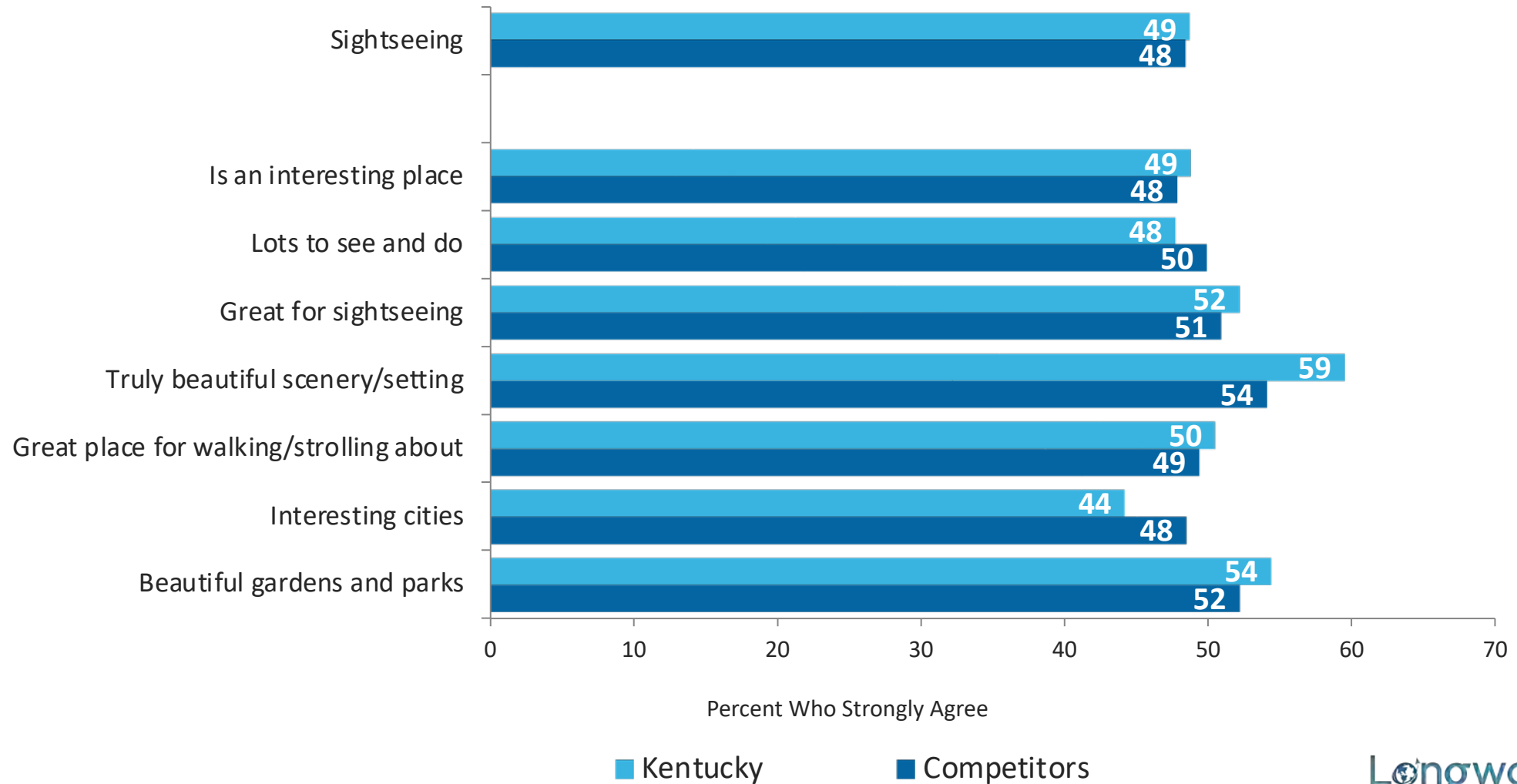
# Kentucky's Image vs. Competition — Family Atmosphere

Base: Existing Markets



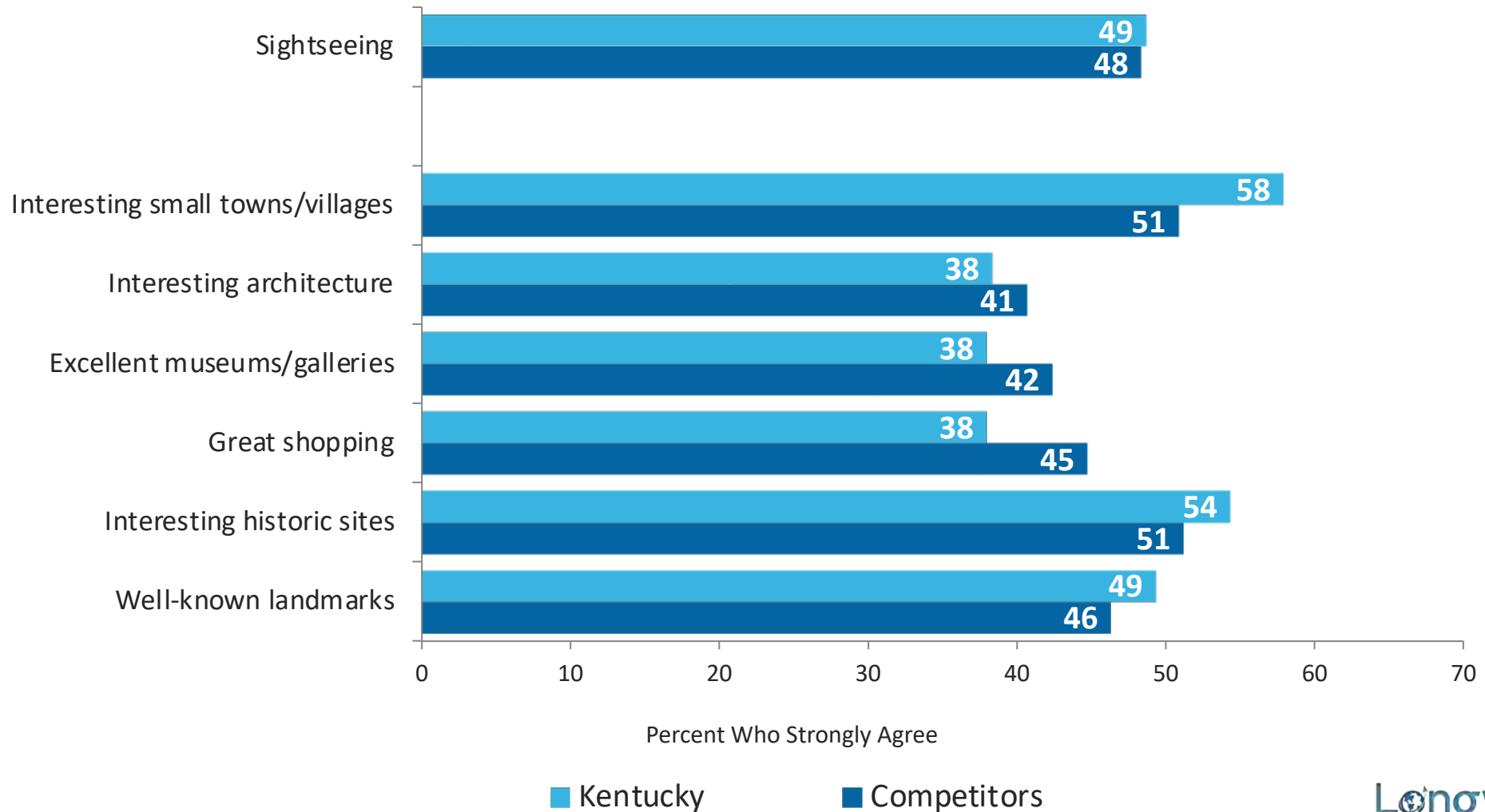
# Kentucky's Image vs. Competition — Sightseeing

Base: Existing Markets



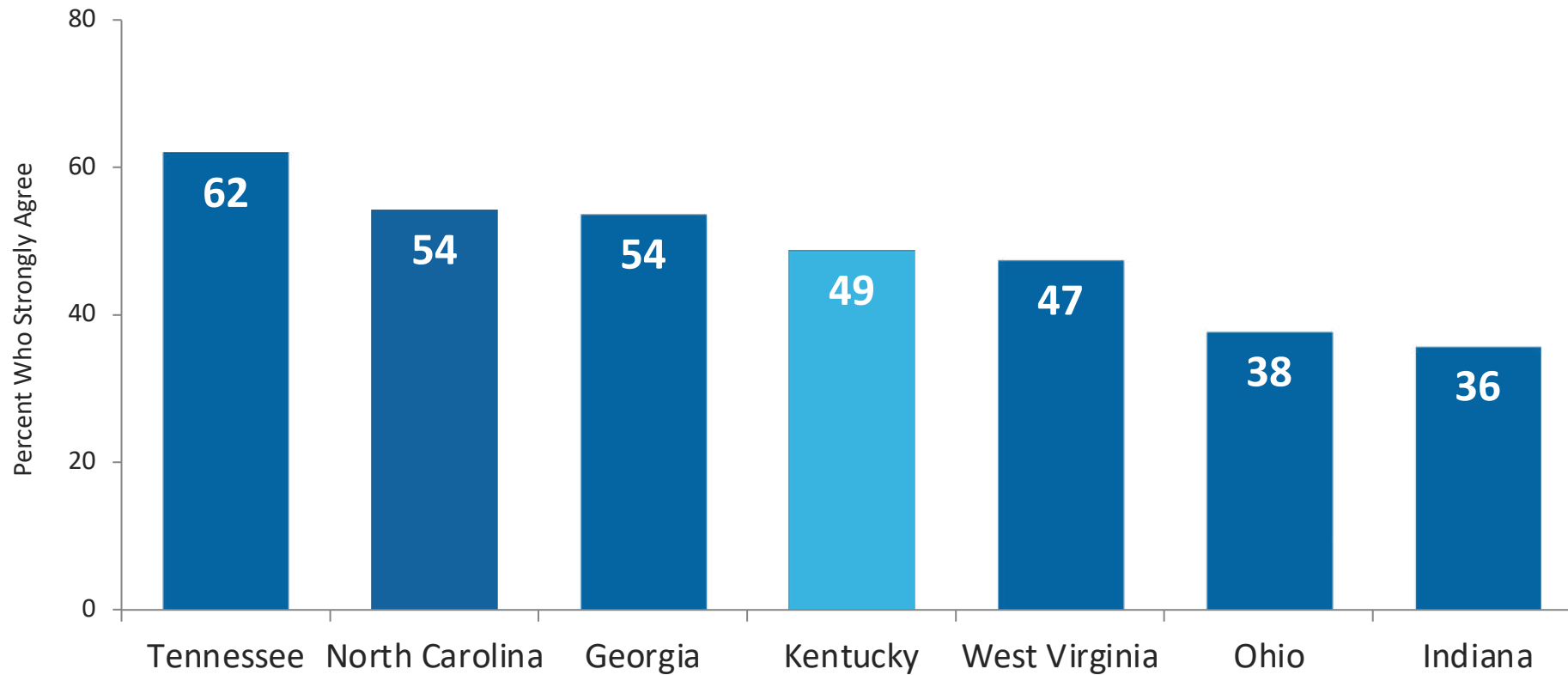
# Kentucky's Image vs. Competition — Sightseeing (Cont'd)

Base: Existing Markets



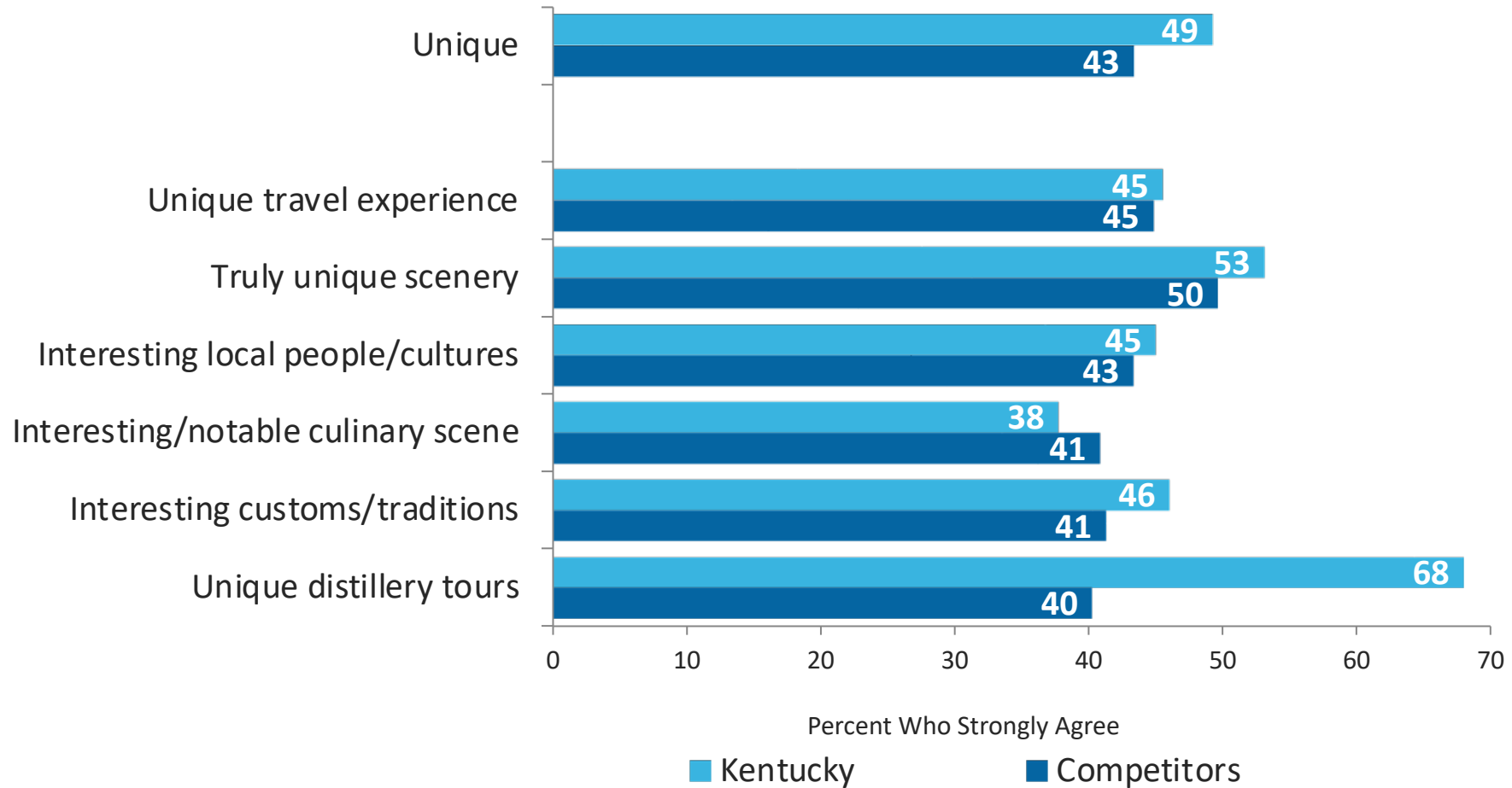
# Kentucky's Image vs. Competition — Sightseeing

Base: Existing Markets



# Kentucky's Image vs. Competition — Unique

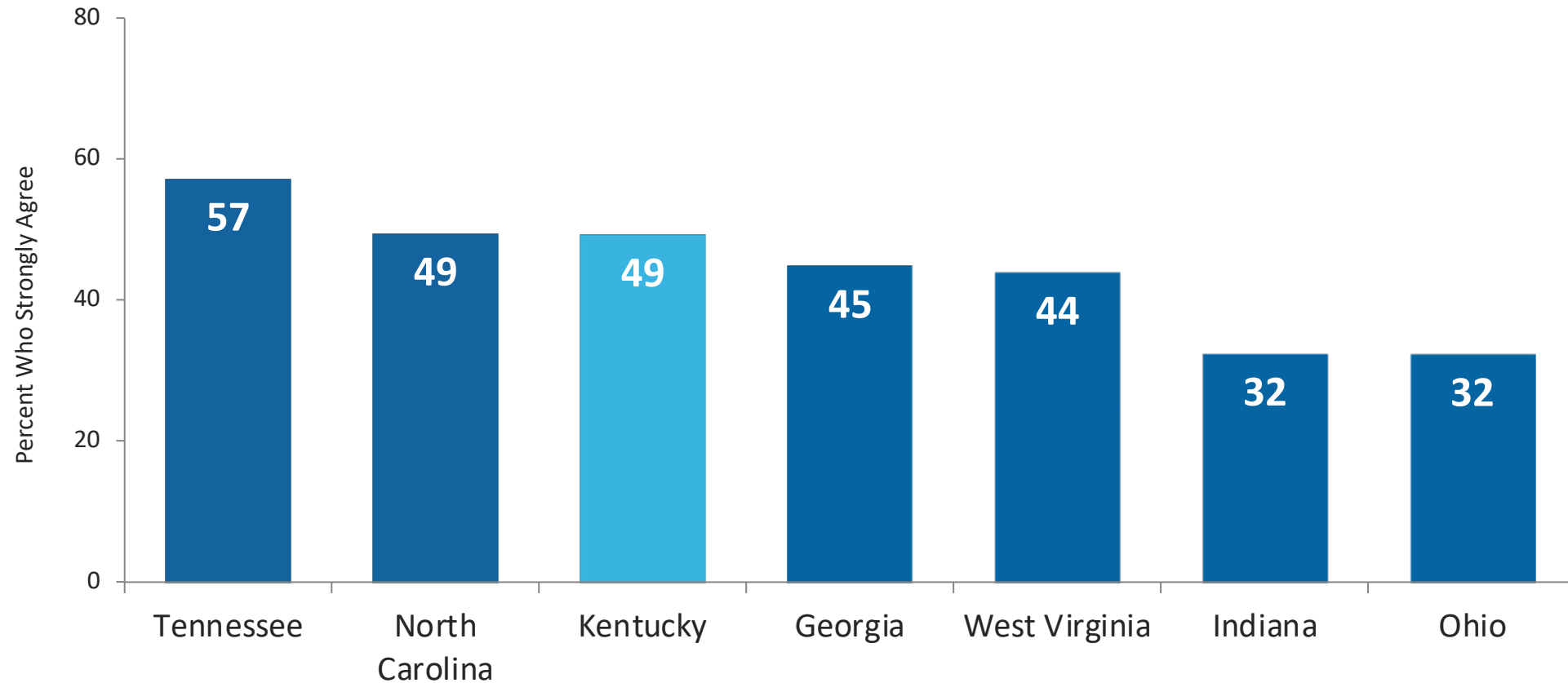
Base: Existing Markets





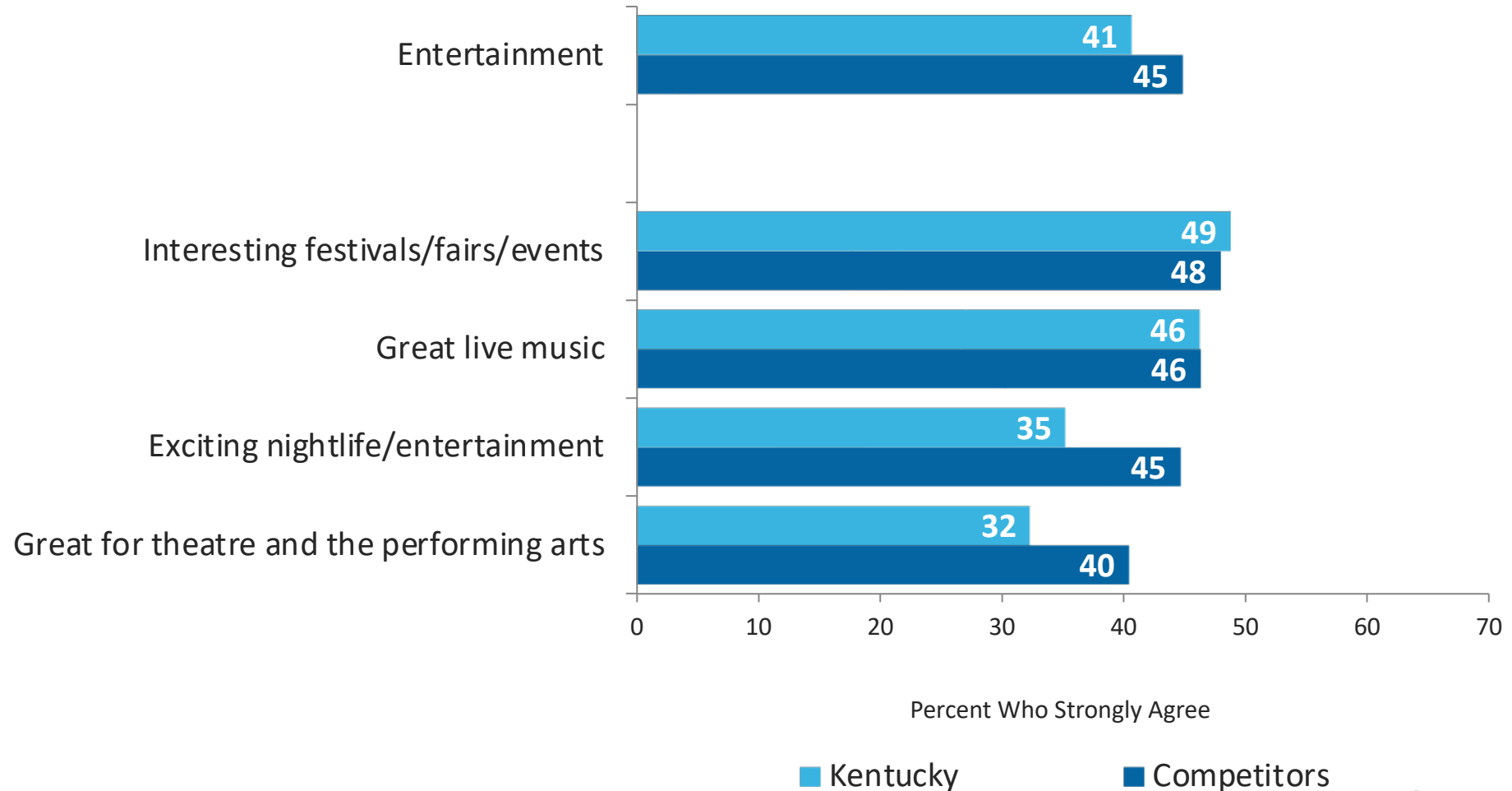
# Kentucky's Image vs. Competition — Unique

Base: Existing Markets



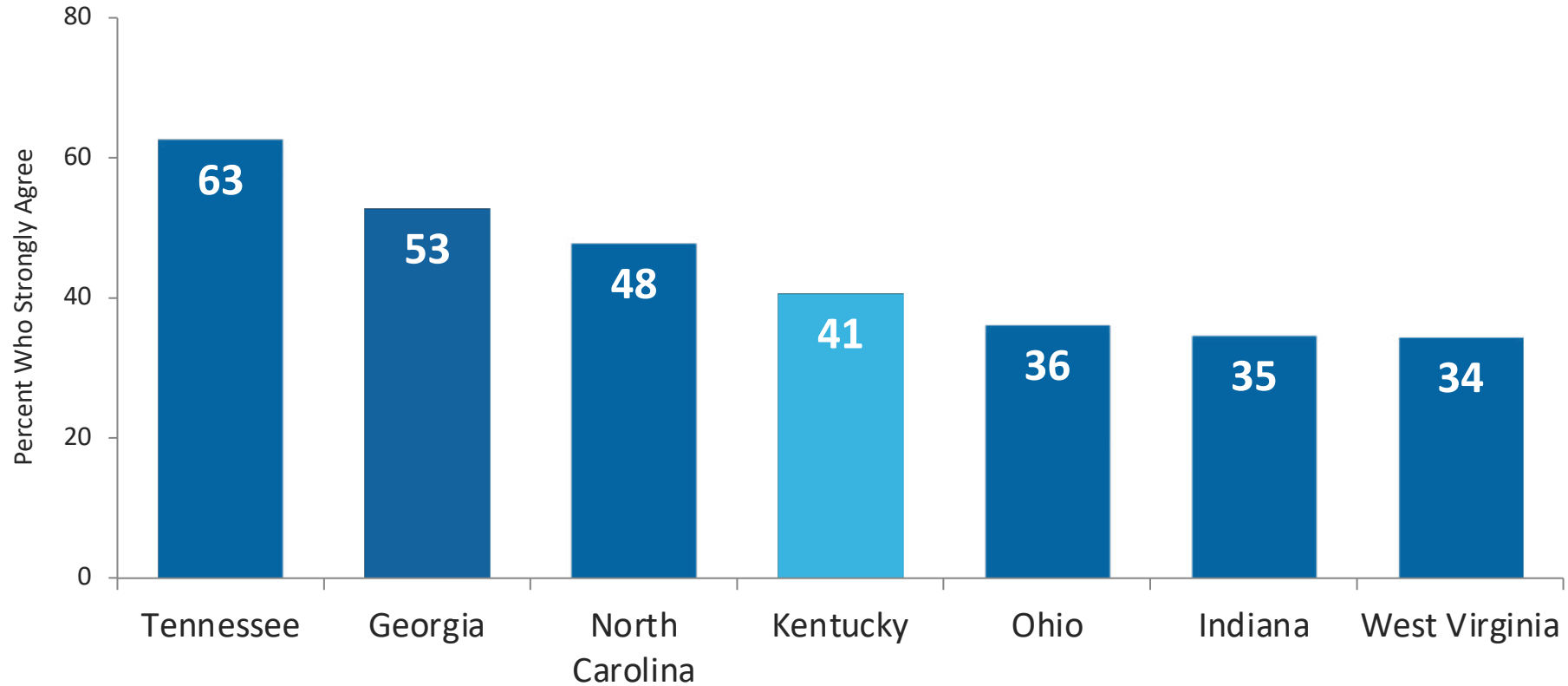
# Kentucky's Image vs. Competition — Entertainment

Base: Existing Markets

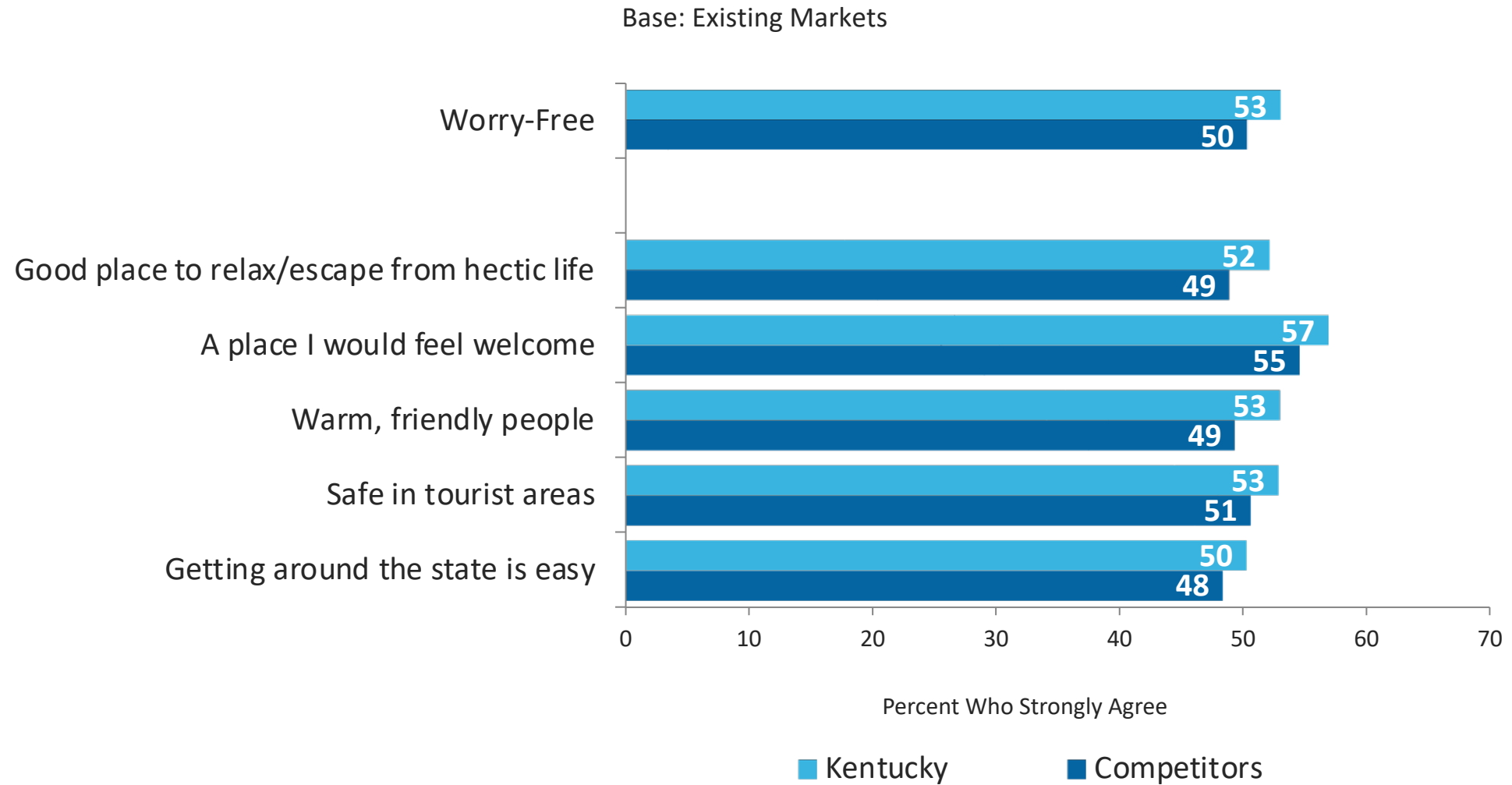


# Kentucky's Image vs. Competition — Entertainment

Base: Existing Markets

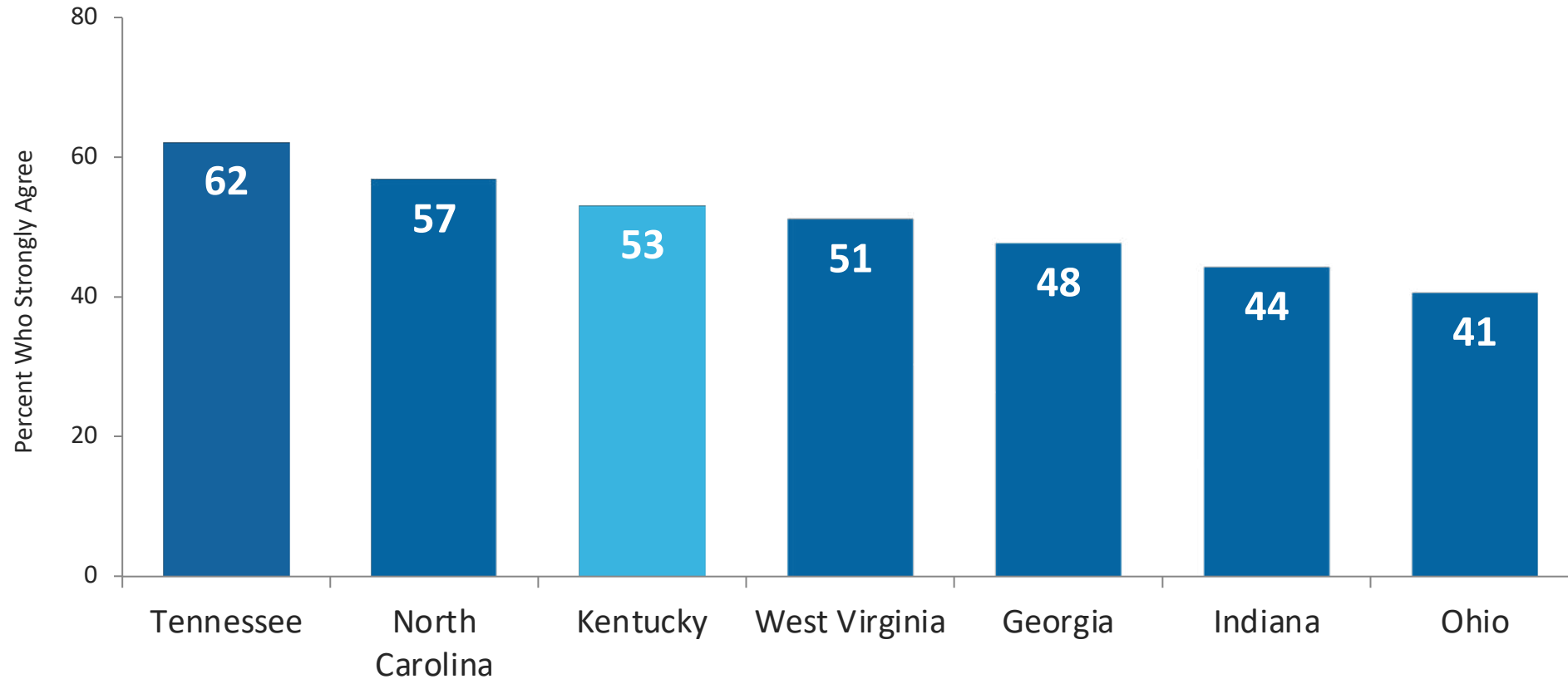


# Kentucky's Image vs. Competition — Worry-Free



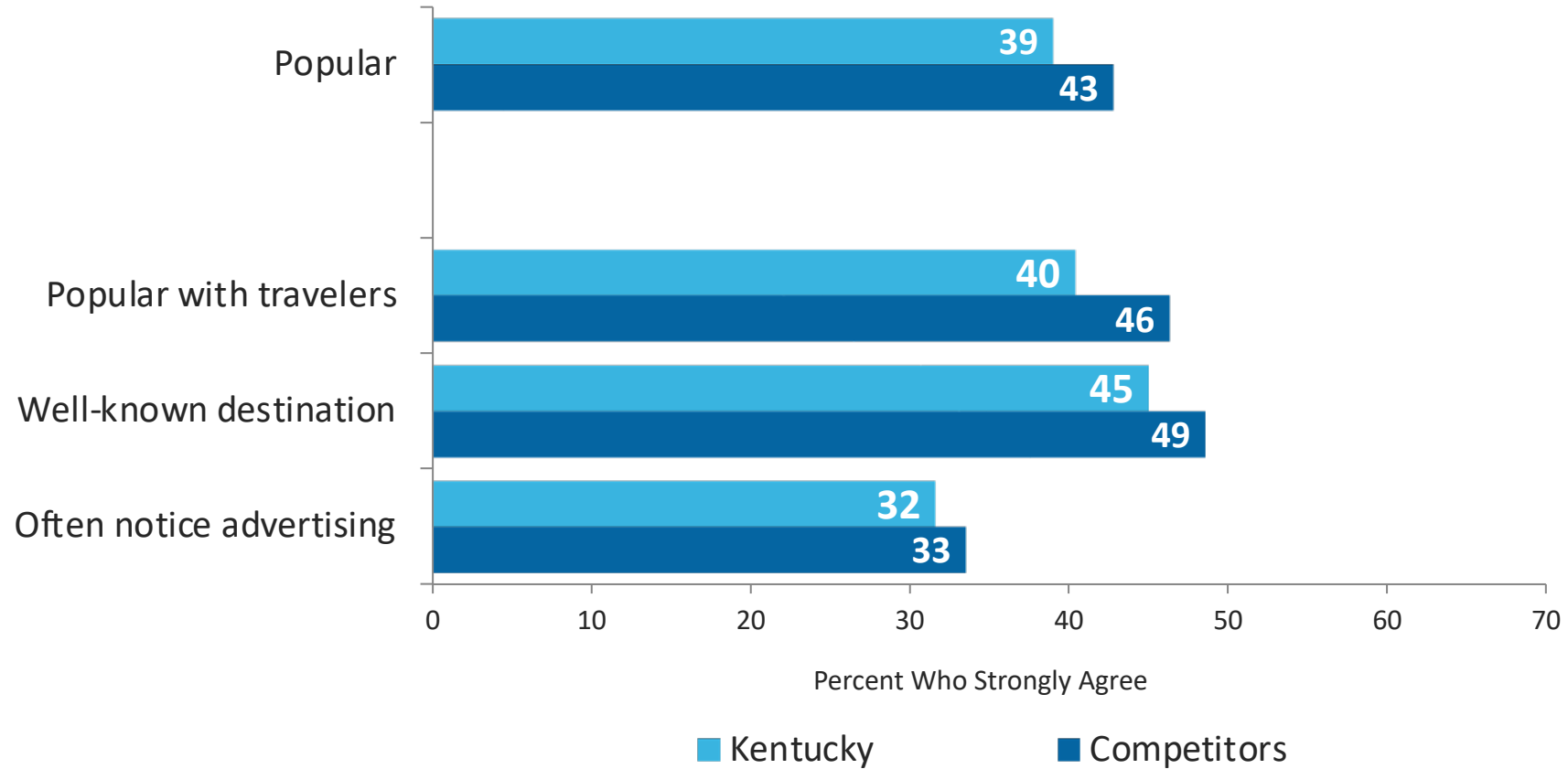
# Kentucky's Image vs. Competition — Worry-Free

Base: Existing Markets



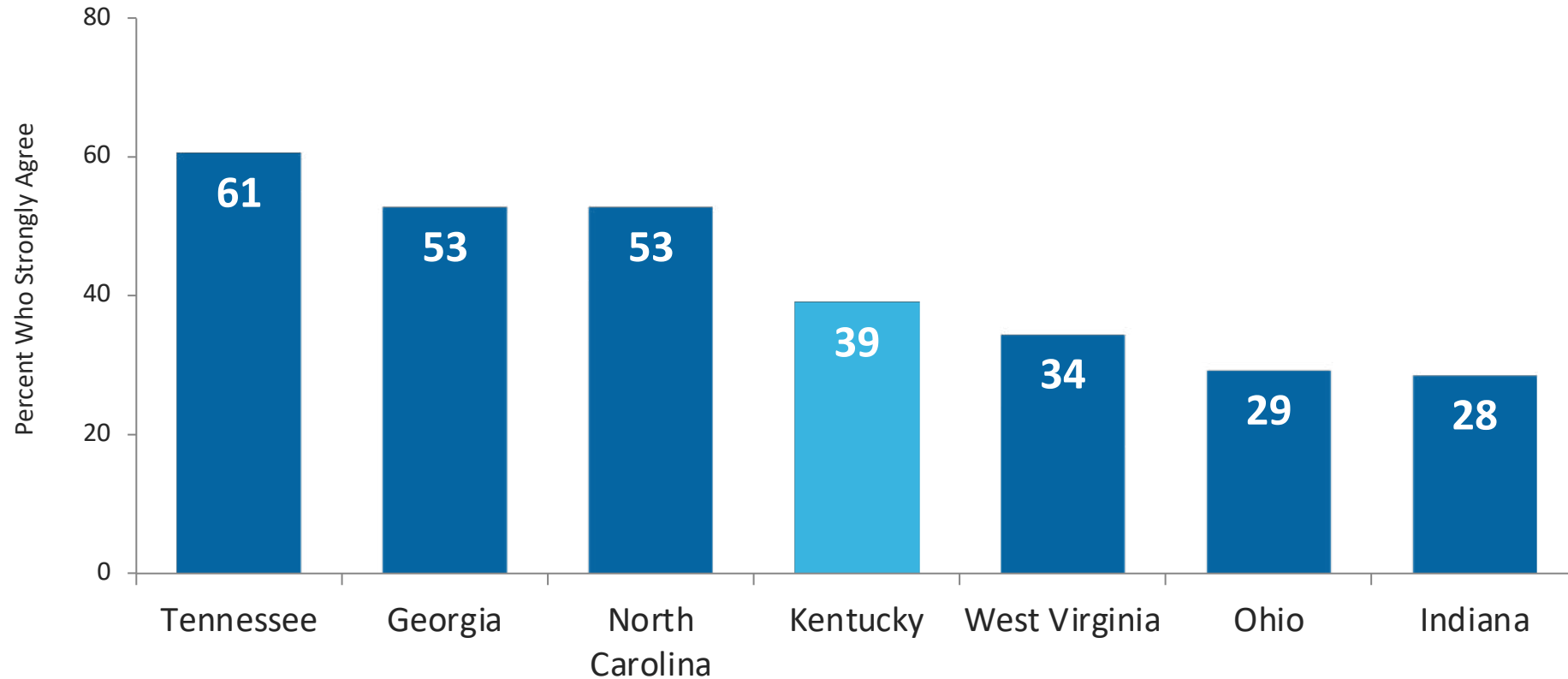
# Kentucky's Image vs. Competition — Popular

Base: Existing Markets



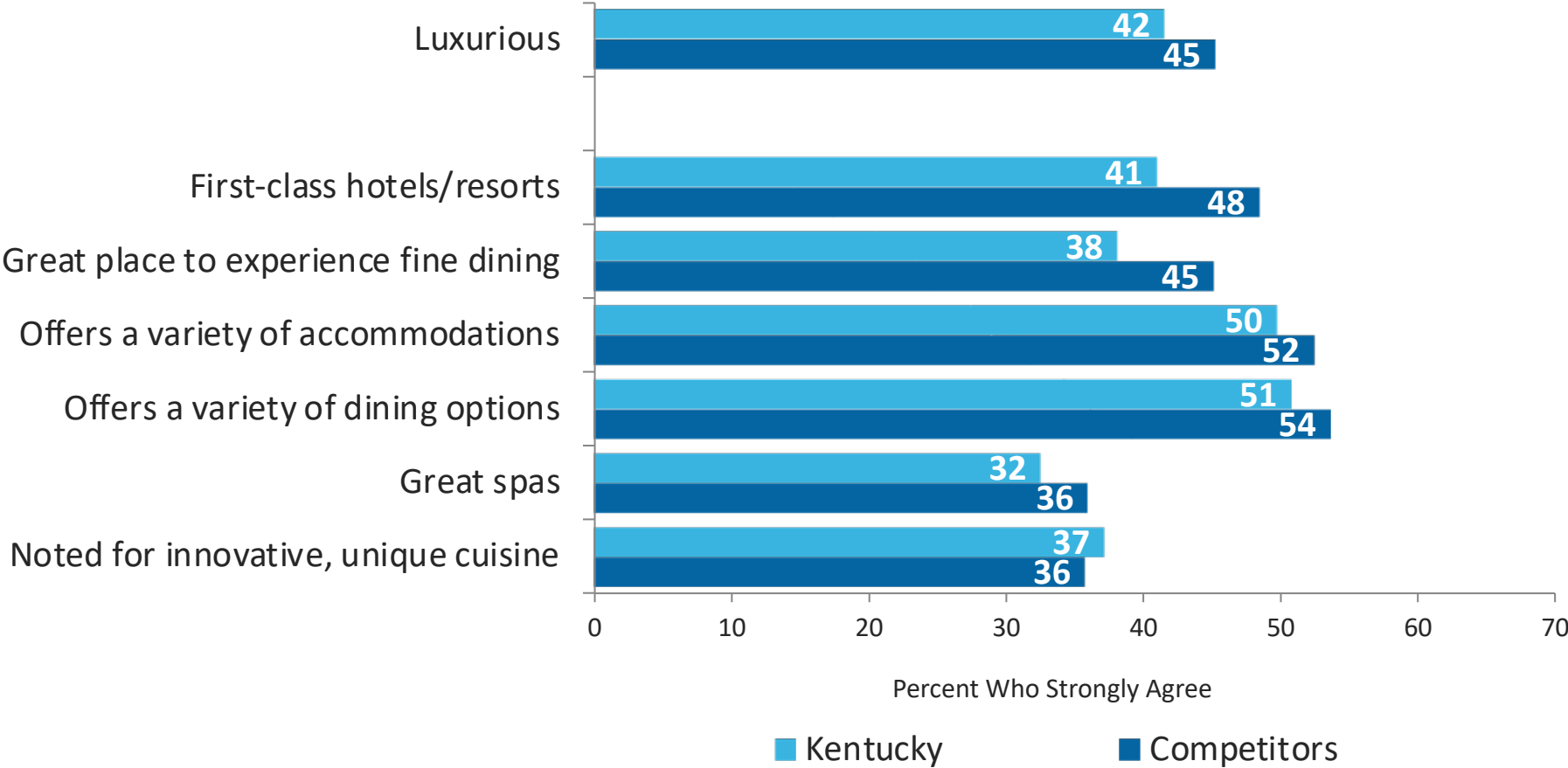
# Kentucky's Image vs. Competition — Popular

Base: Existing Markets



# Kentucky's Image vs. Competition — Luxurious

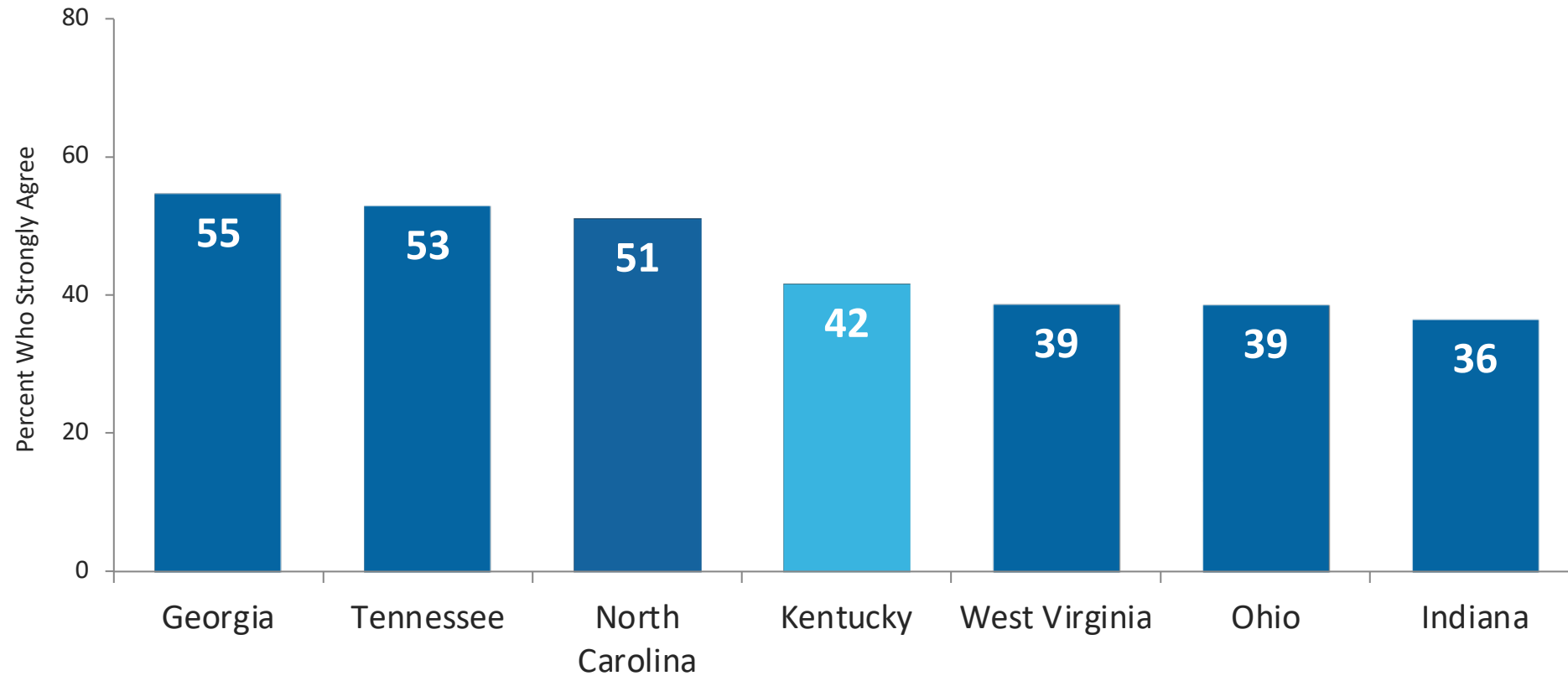
Base: Existing Markets





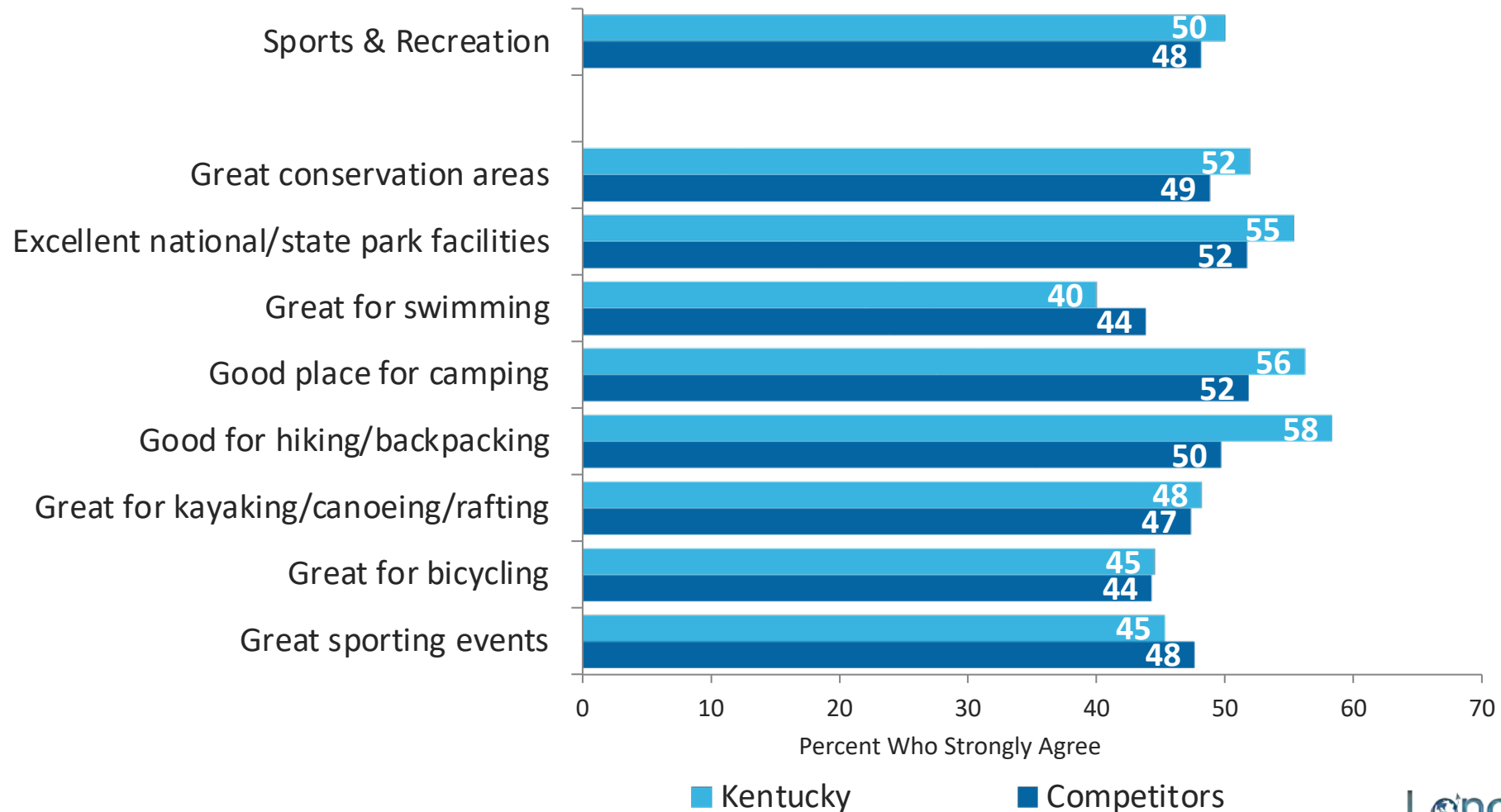
# Kentucky's Image vs. Competition — Luxurious

Base: Existing Markets



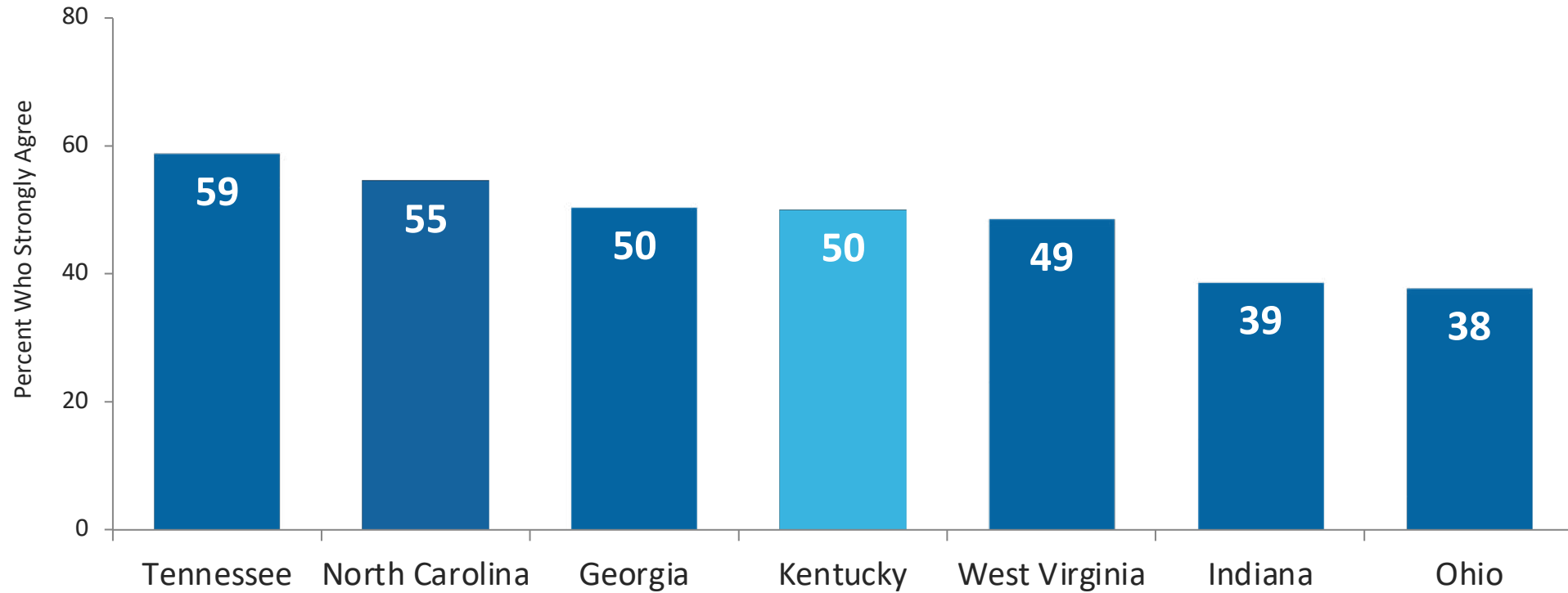
# Kentucky's Image vs. Competition — Sports & Recreation

Base: Existing Markets

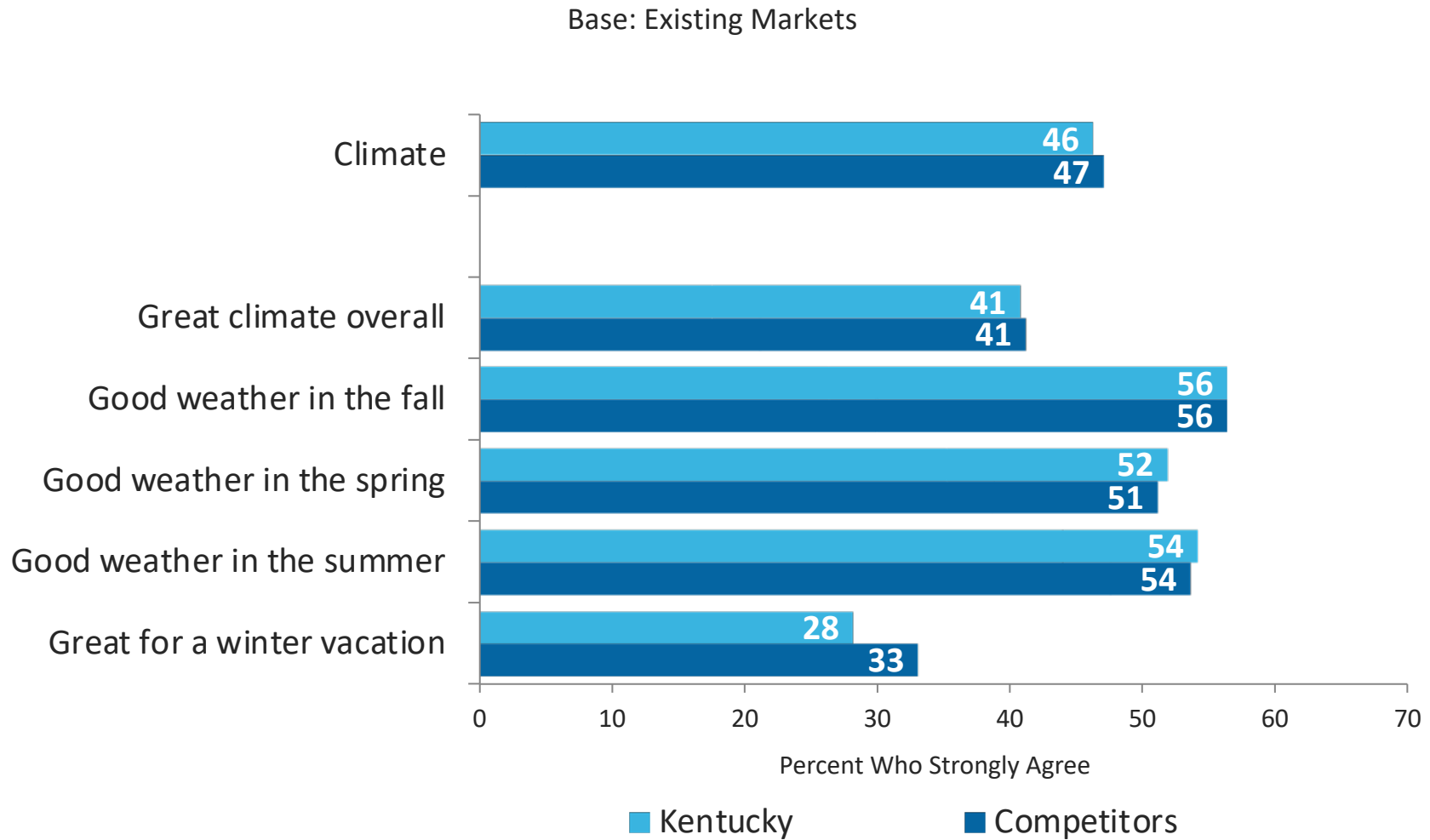


# Kentucky's Image vs. Competition — Sports & Recreation

Base: Existing Markets

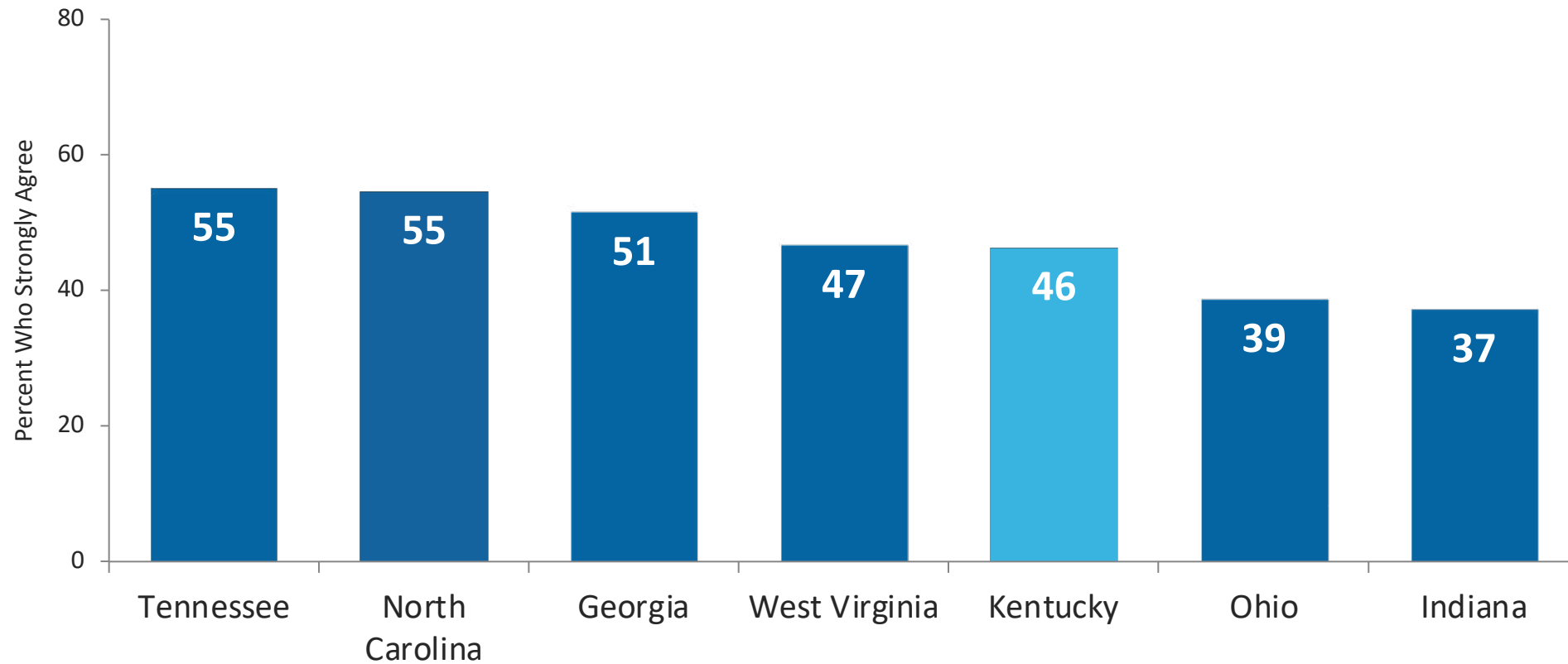


# Kentucky's Image vs. Competition — Climate

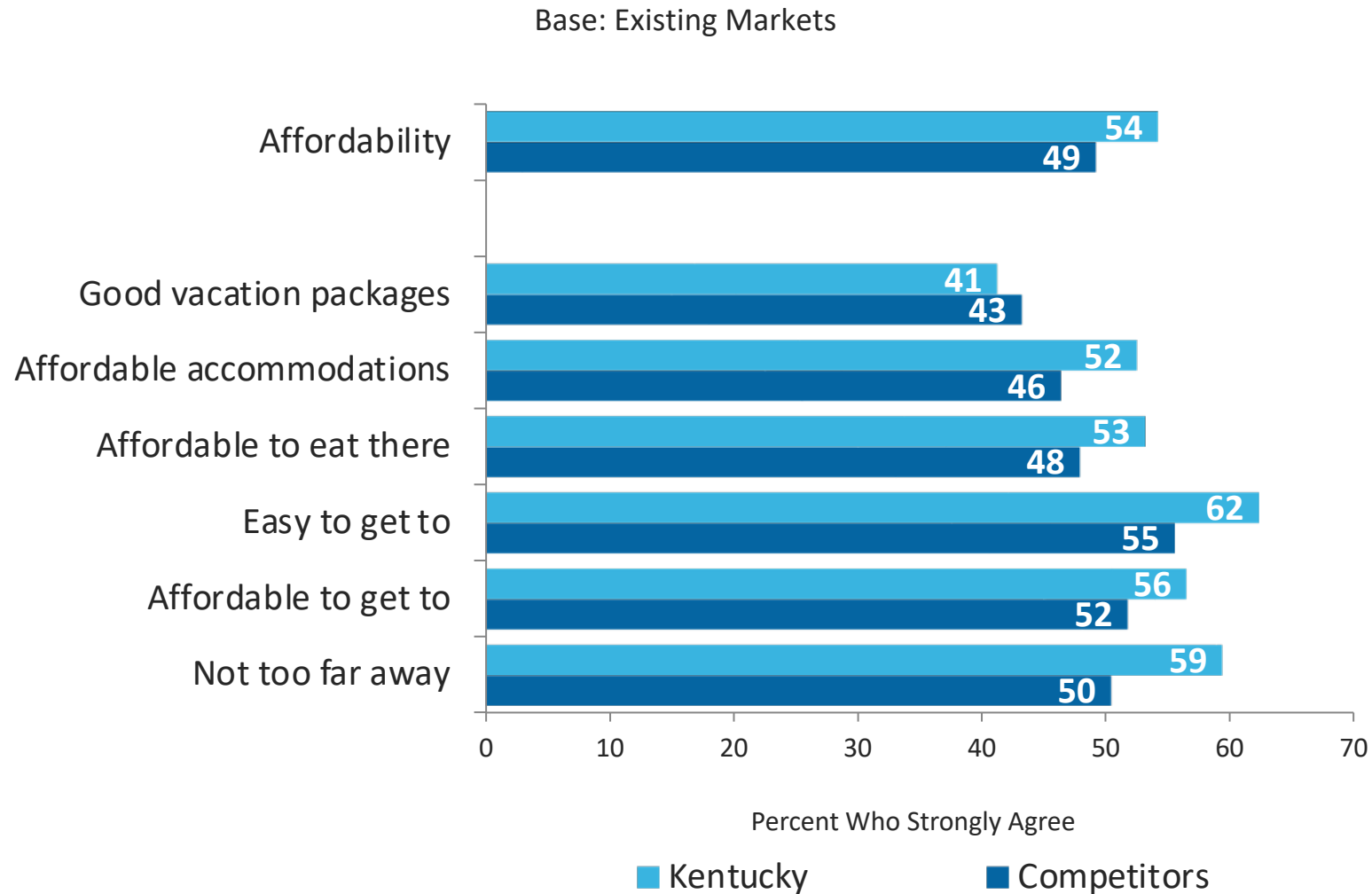


# Kentucky's Image vs. Competition — Climate

Base: Existing Markets

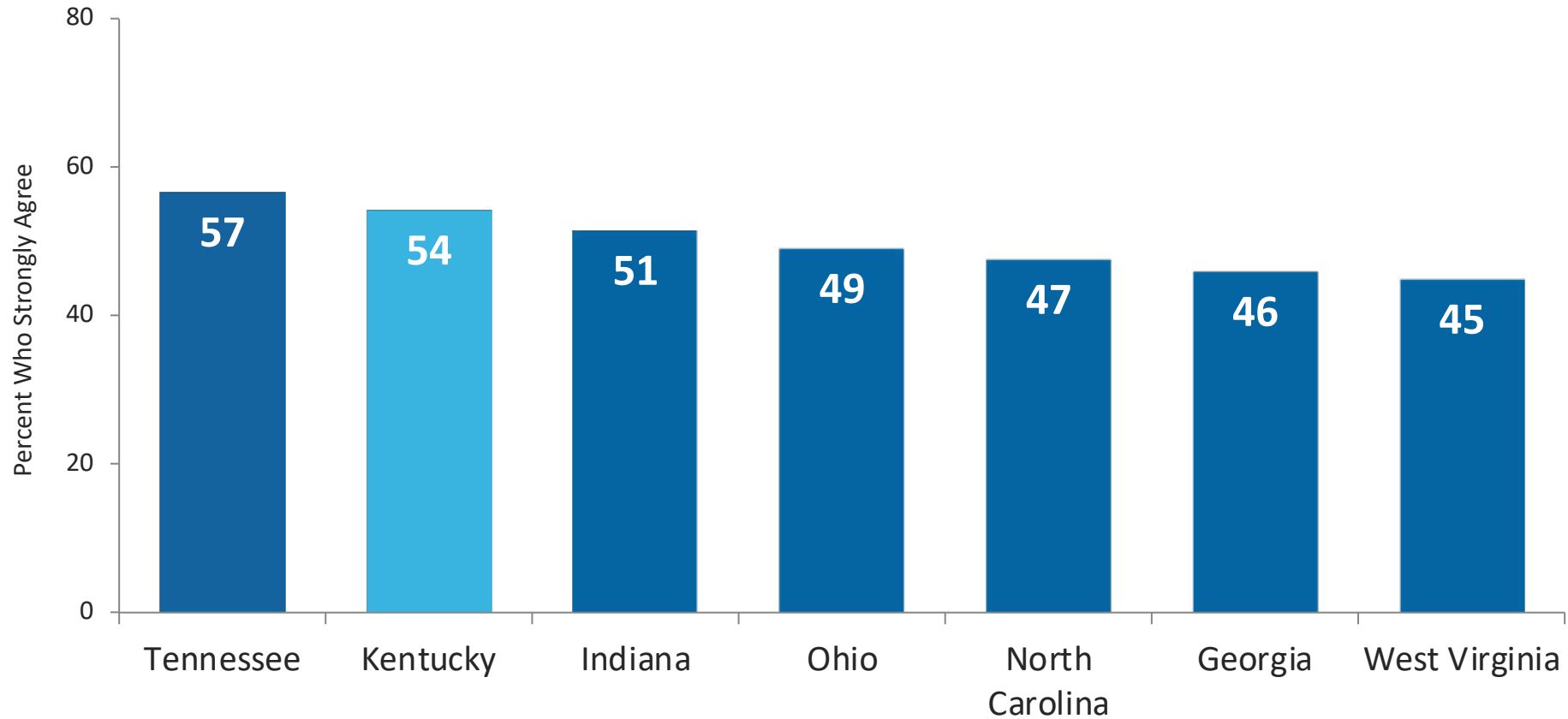


# Kentucky's Image vs. Competition — Affordability



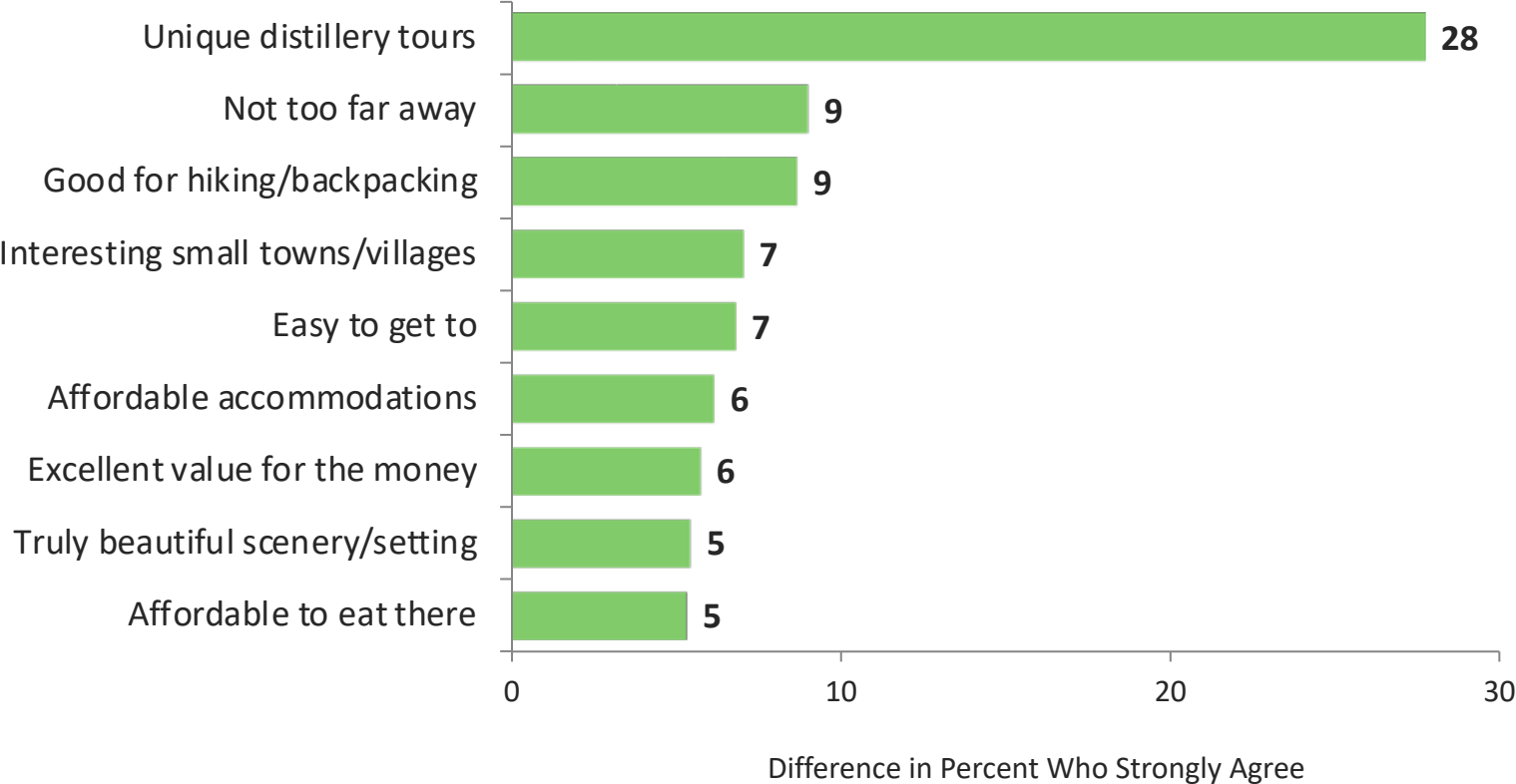
# Kentucky's Image vs. Competition — Affordability

Base: Existing Markets



# Kentucky's Image Strengths vs. Competition

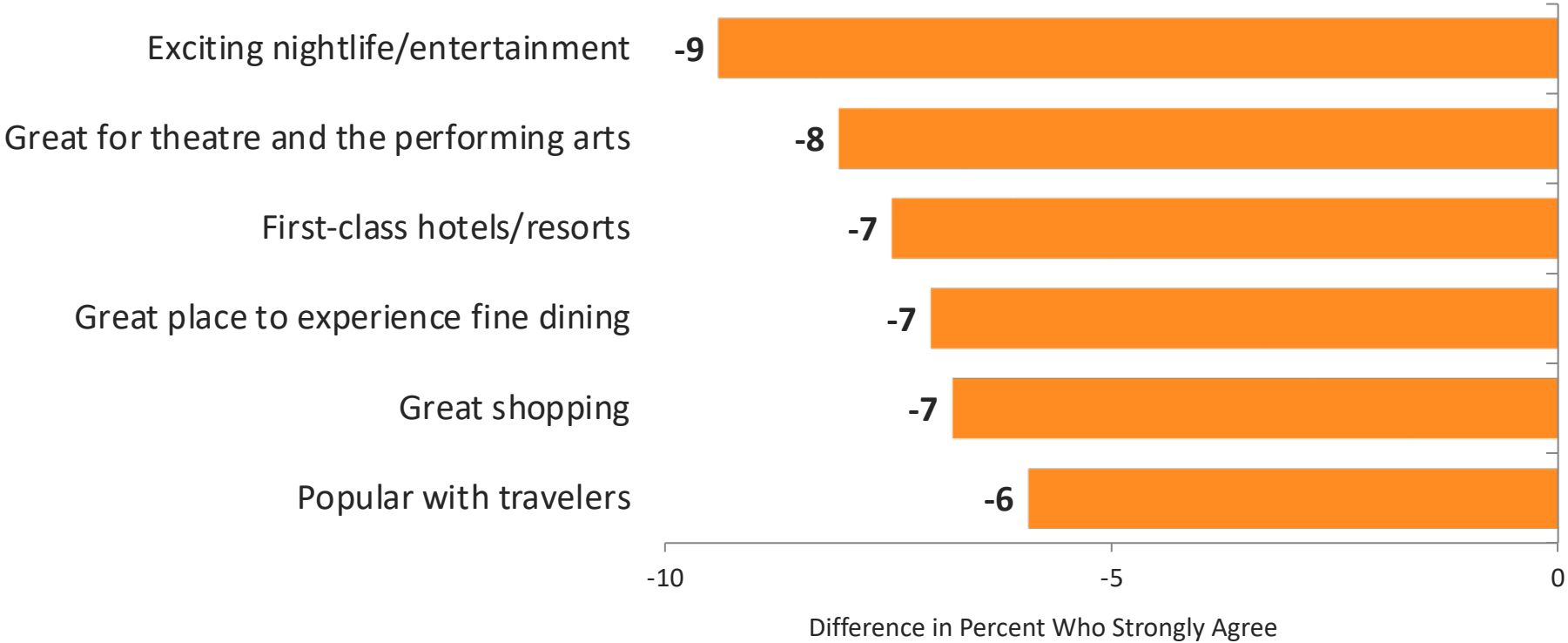
Base: Existing Markets





# Kentucky's Image Weaknesses vs. Competition

Base: Existing Markets





## Halo Effect on Economic Development Image

# Halo Effect Analysis

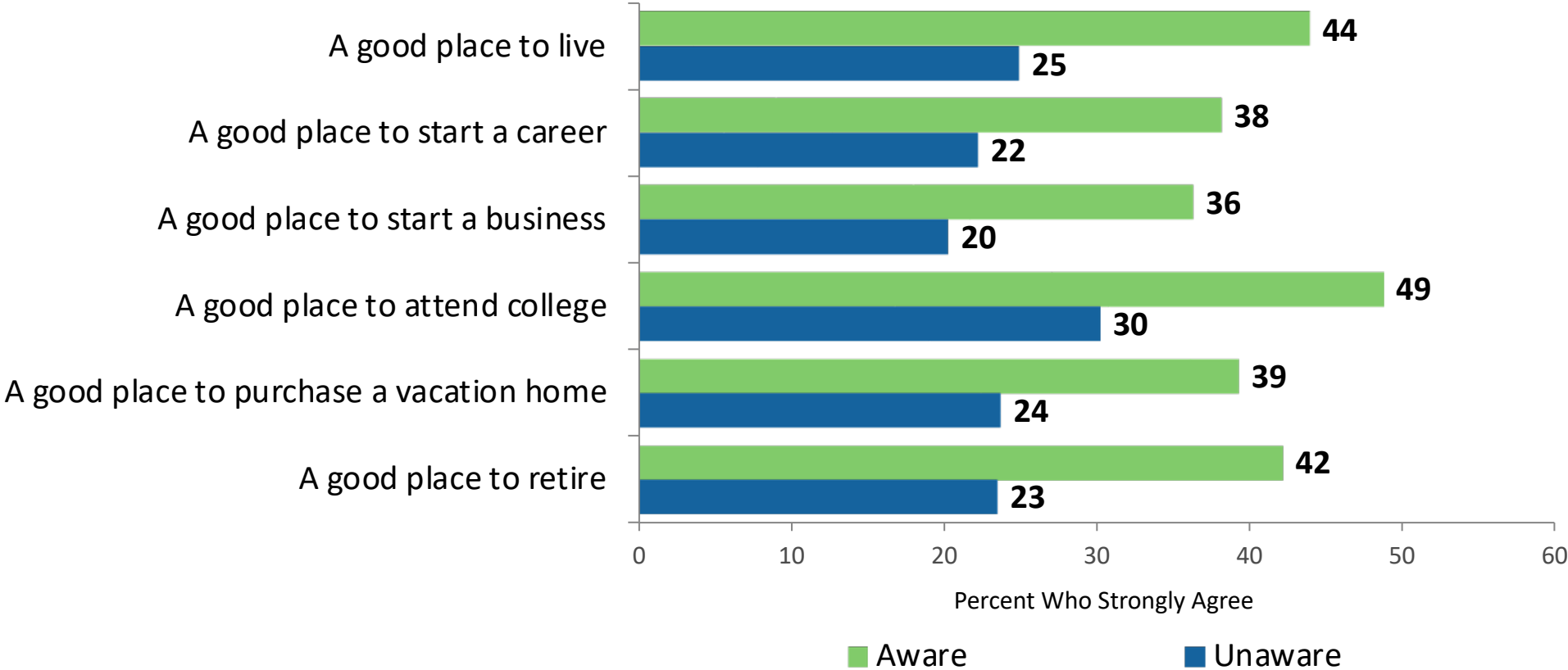
- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out 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?
- Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.
- The research compared out-of-state consumers' ratings of Kentucky on economic development image attributes by those who had not seen the campaign or visited Kentucky with those who did see the tourism ads and/or visited.
- Looking at the existing advertising markets, in every case, Kentucky's tourism advertising significantly improved the image of Kentucky for a wide range of economic development objectives. Out-of-state travelers who saw the advertising rated Kentucky higher on all the economic development indicators included in the study.

# Halo Effect Analysis (Cont.)

- Visitation significantly improved the image of Kentucky for all variables as well.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Kentucky. On all attributes measured, more of those who saw the advertising and visited the state rated Kentucky higher across these economic development indicators.

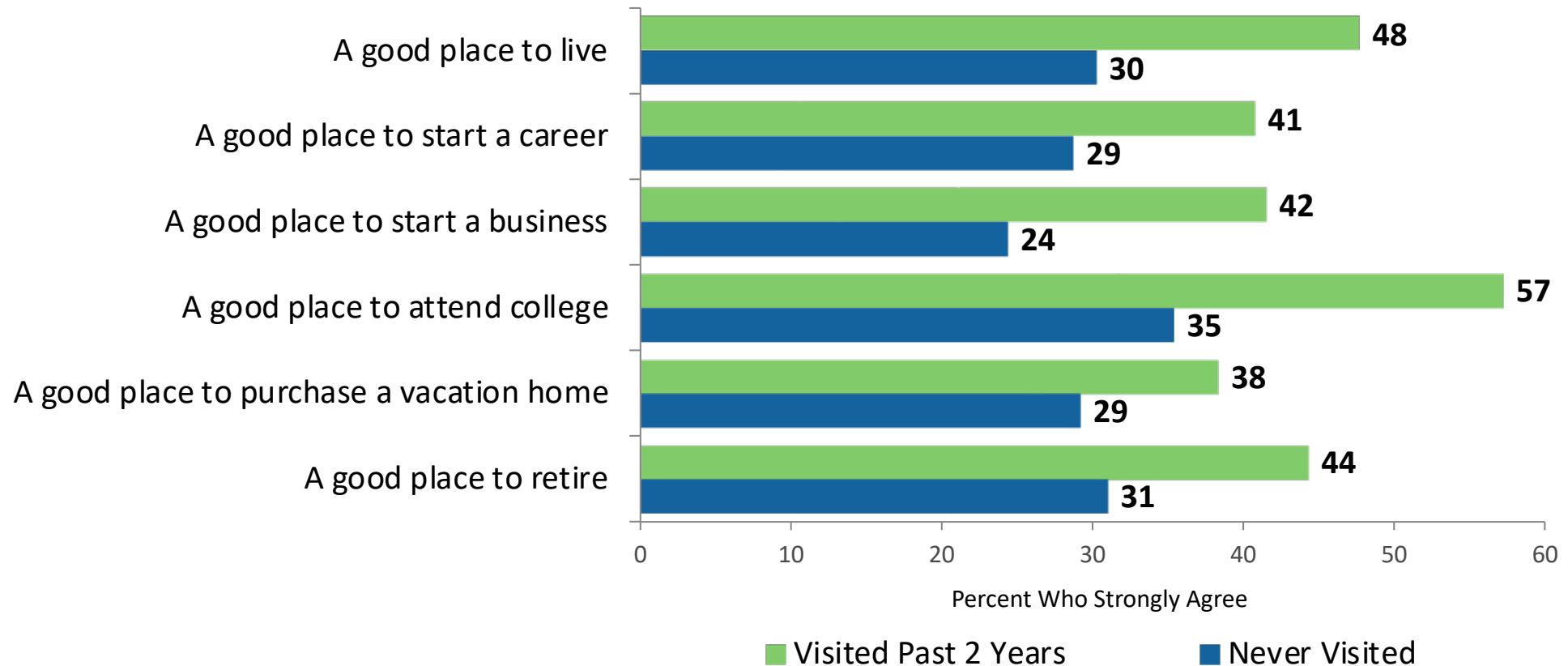
# Impact of *Tourism Ad Awareness* on Kentucky's Economic Development Image

Base: Existing Markets

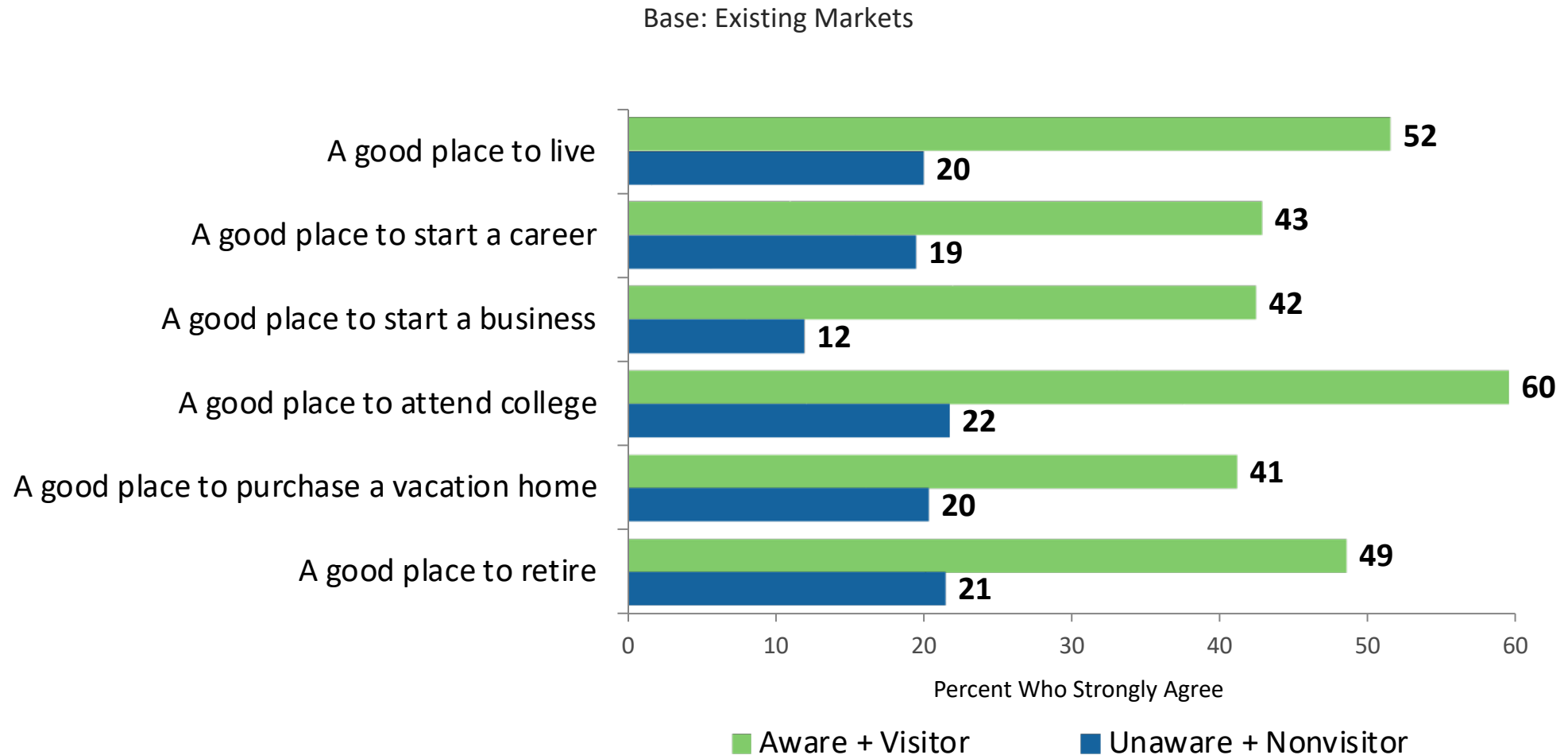


# Impact of *Visitation* on Kentucky's Economic Development Image

Base: Existing Markets



# Impact of Ad Awareness *plus* Visitation on Kentucky's Economic Development Image





**Longwoods**  
INTERNATIONAL

**Appendix: Kentucky's  
Image Strengths &  
Weaknesses vs.  
Individual  
Competitors**

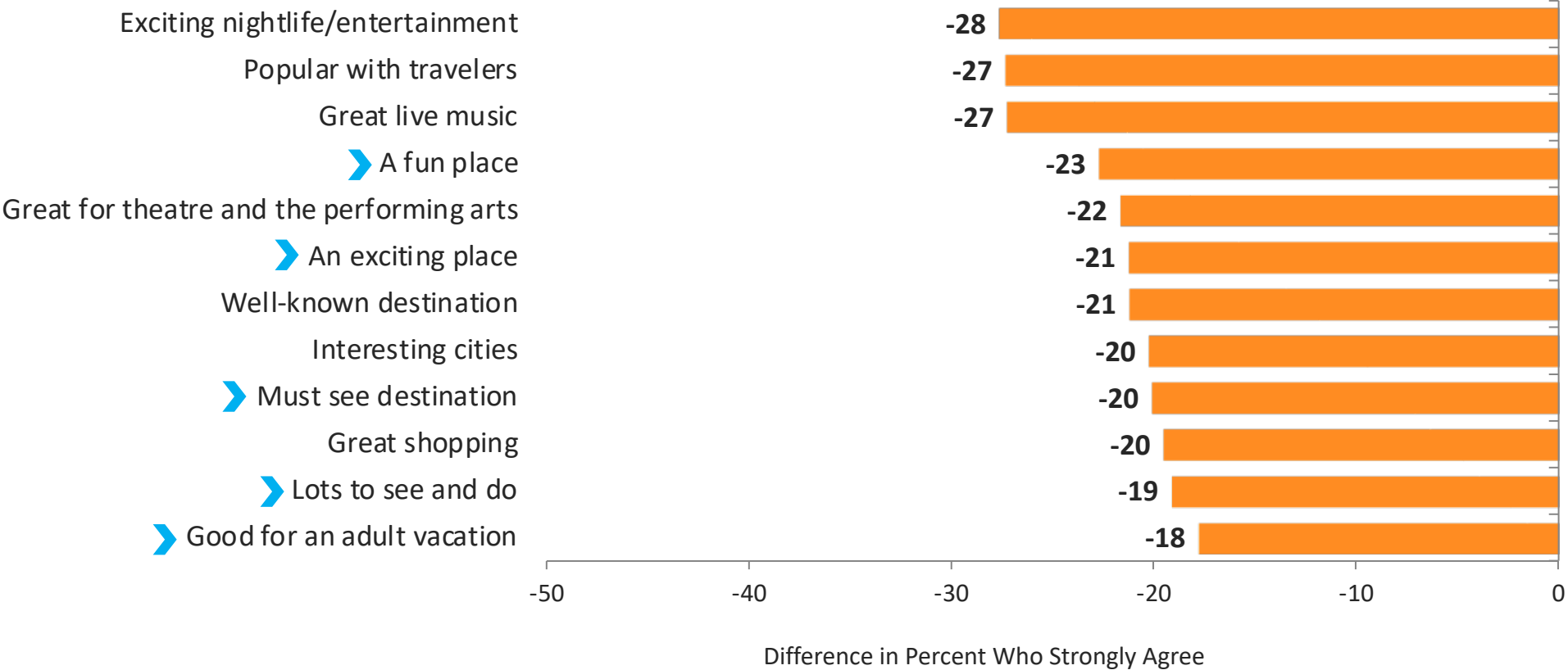


# Kentucky's Image Strengths vs. Tennessee

**THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE STRENGTHS VS.  
TENNESSEE**

# Kentucky's Image Weaknesses vs. Tennessee

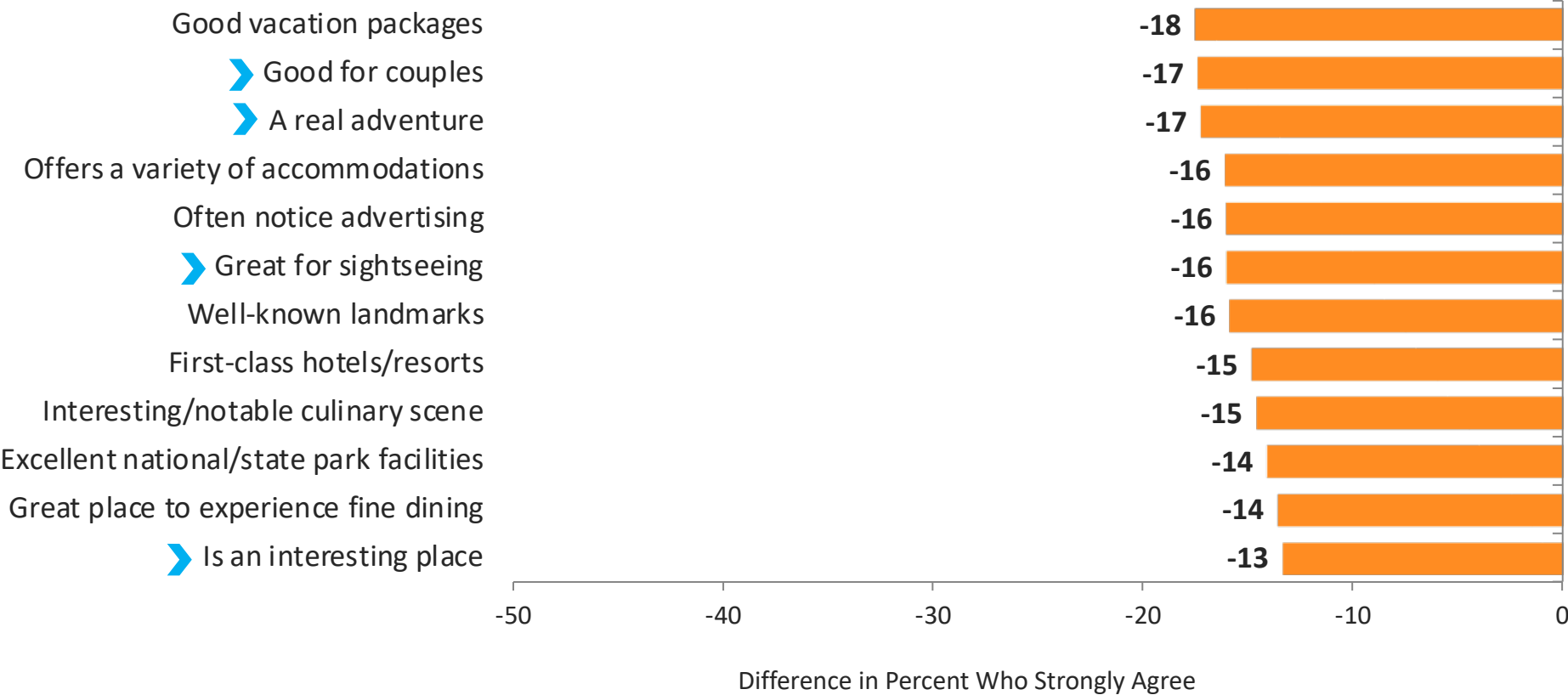
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

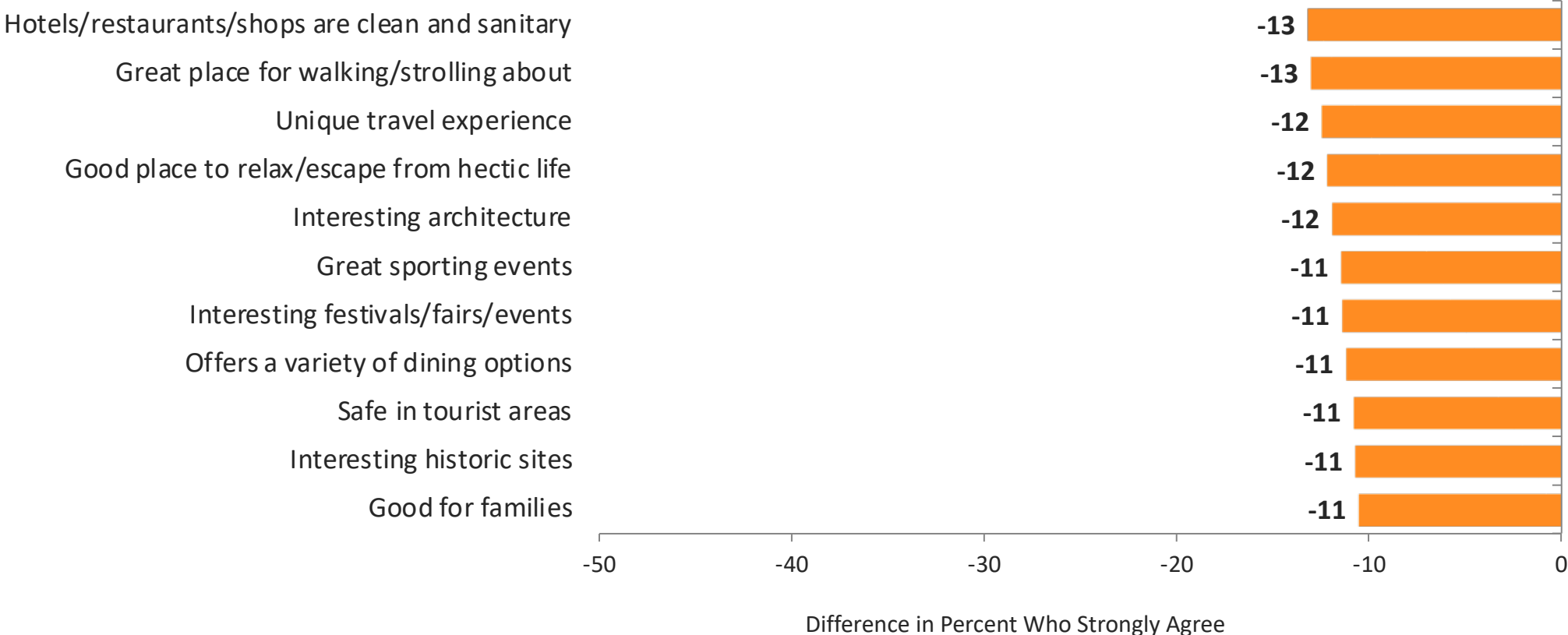
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

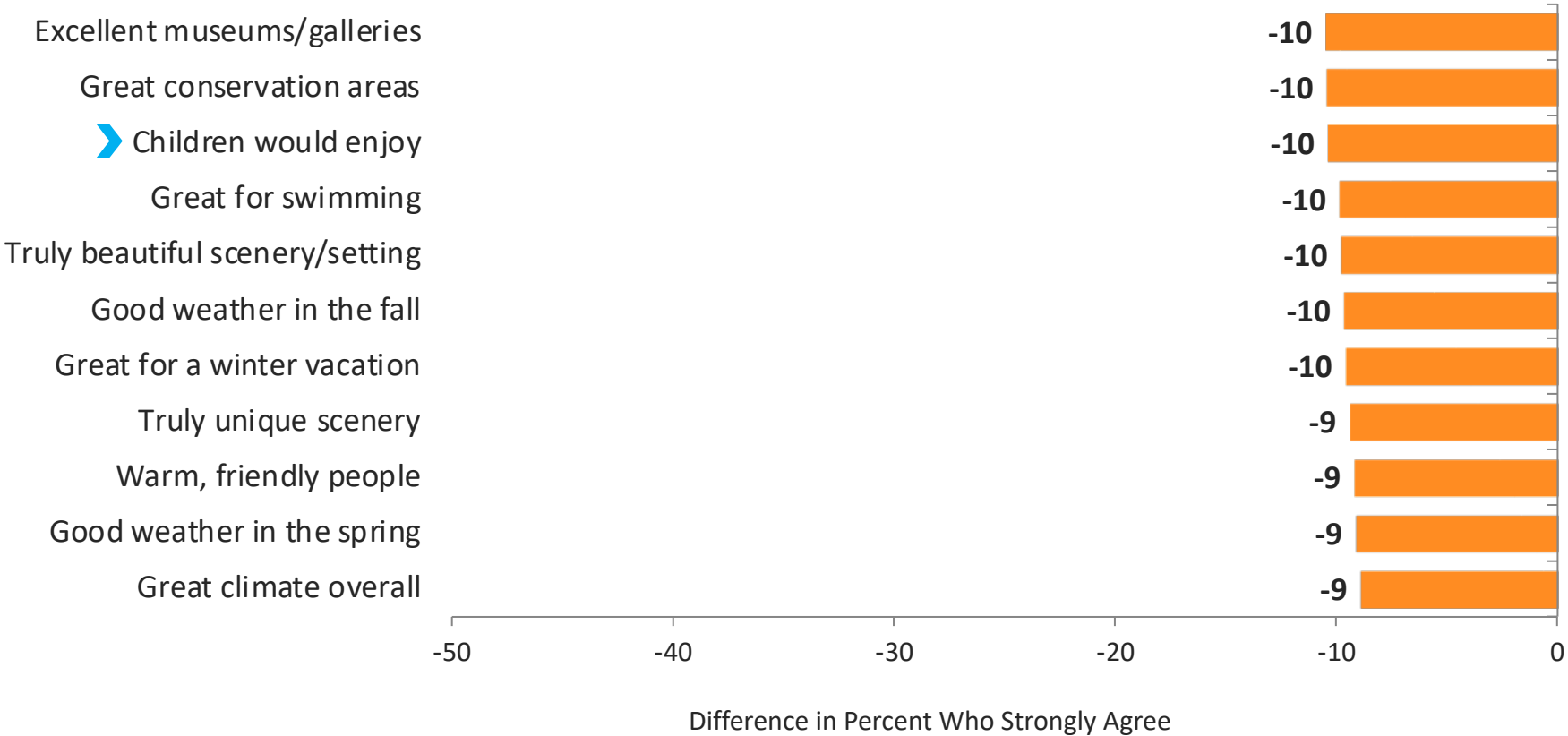
# Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

Base: Existing Markets



# Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

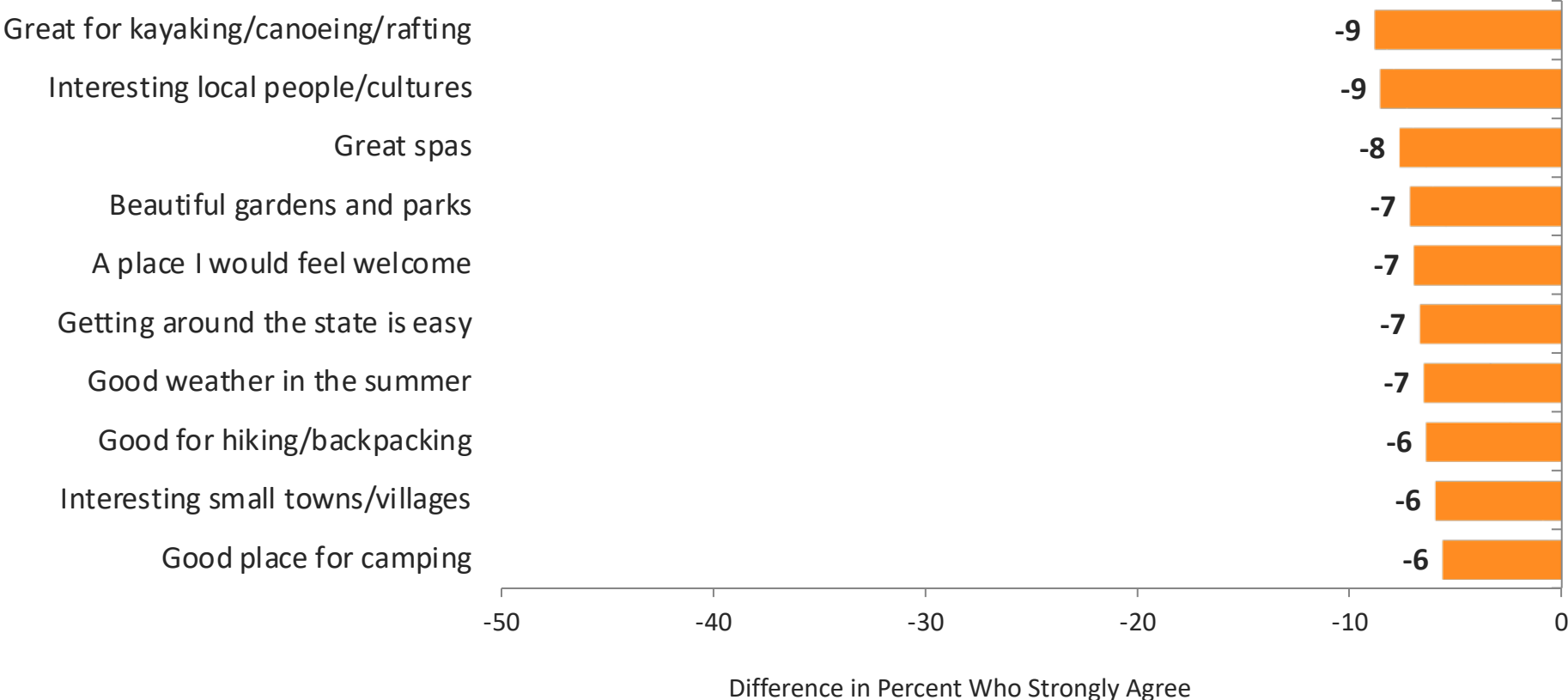
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

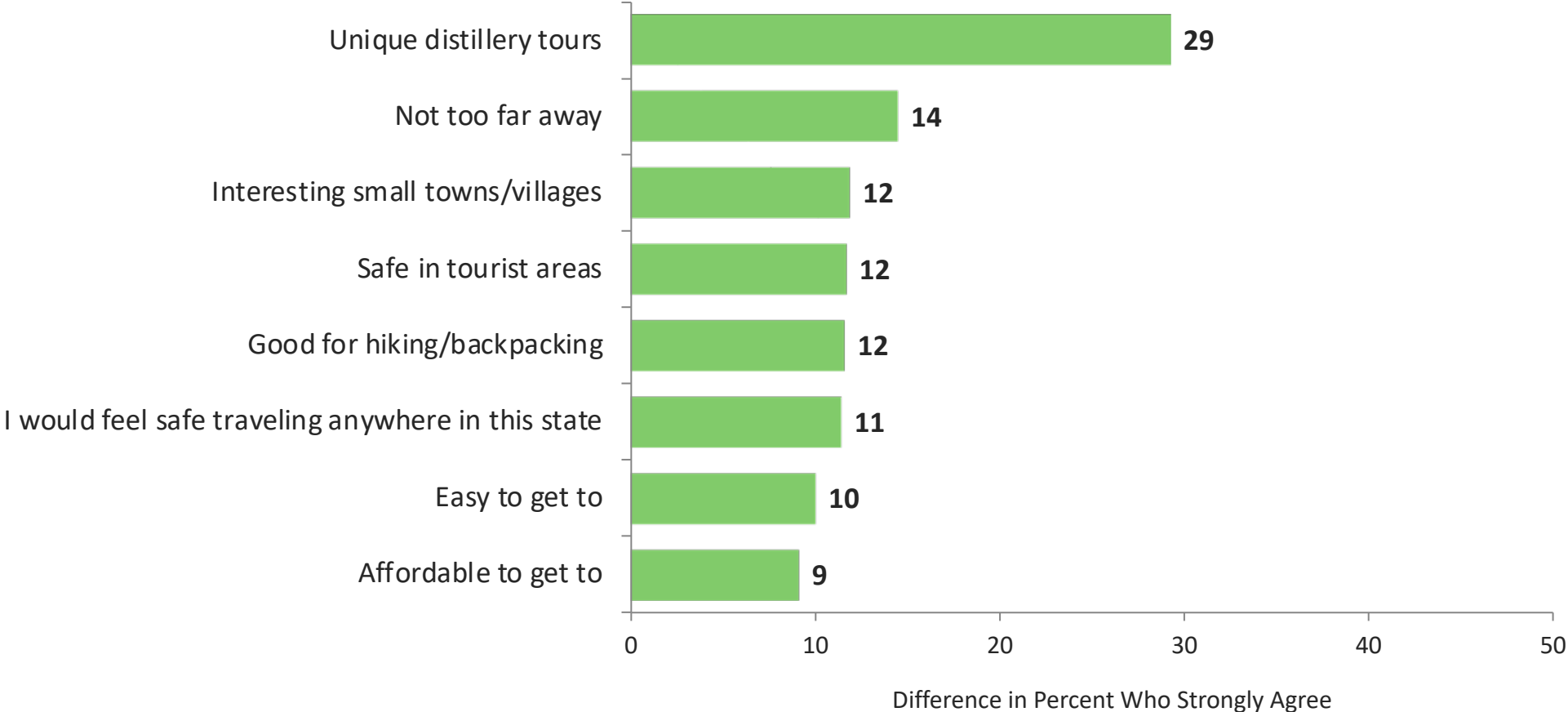
# Kentucky's Image Weaknesses vs. Tennessee (Cont'd)

Base: Existing Markets

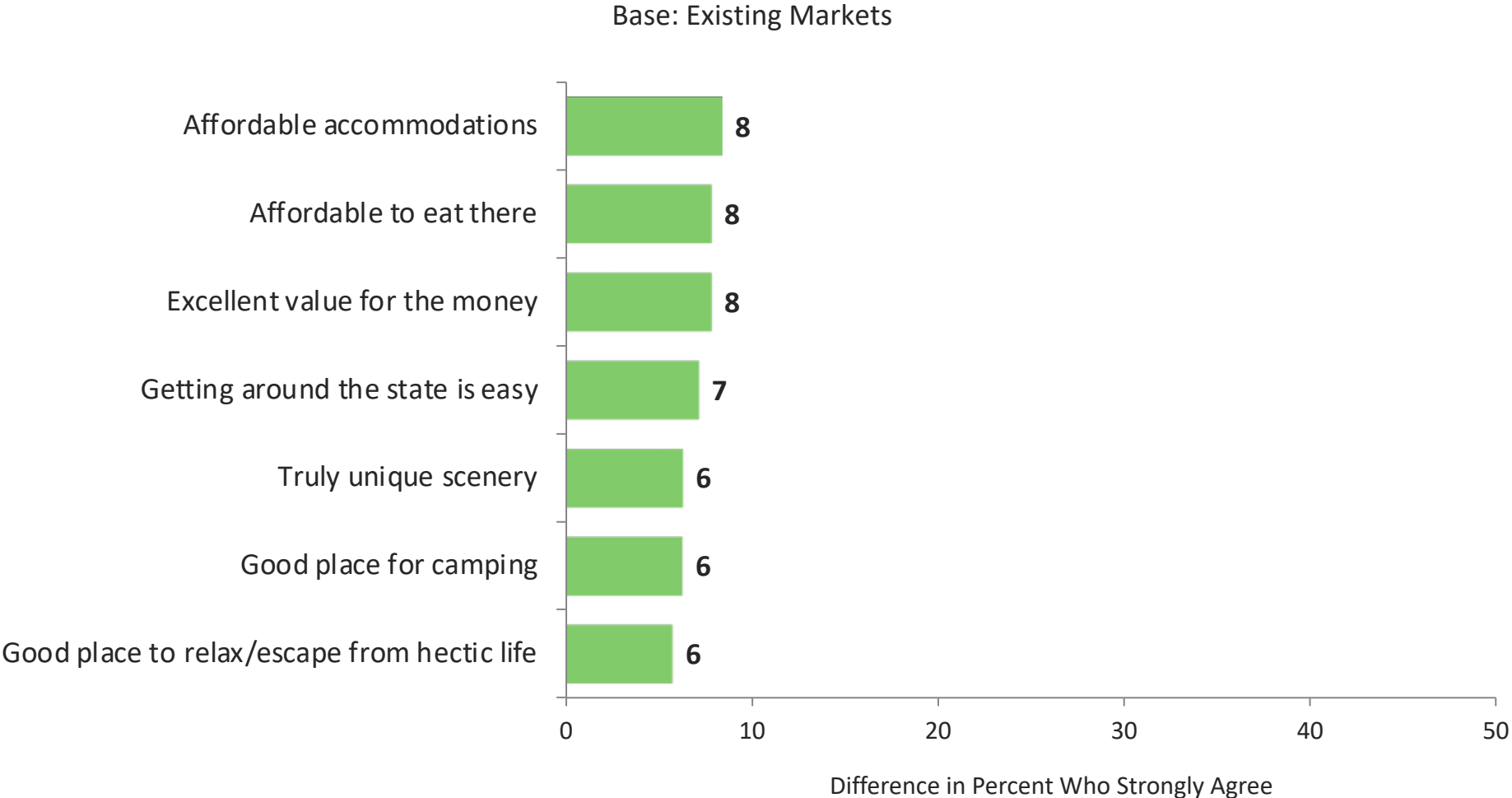


# Kentucky's Image Strengths vs. Georgia

Base: Existing Markets



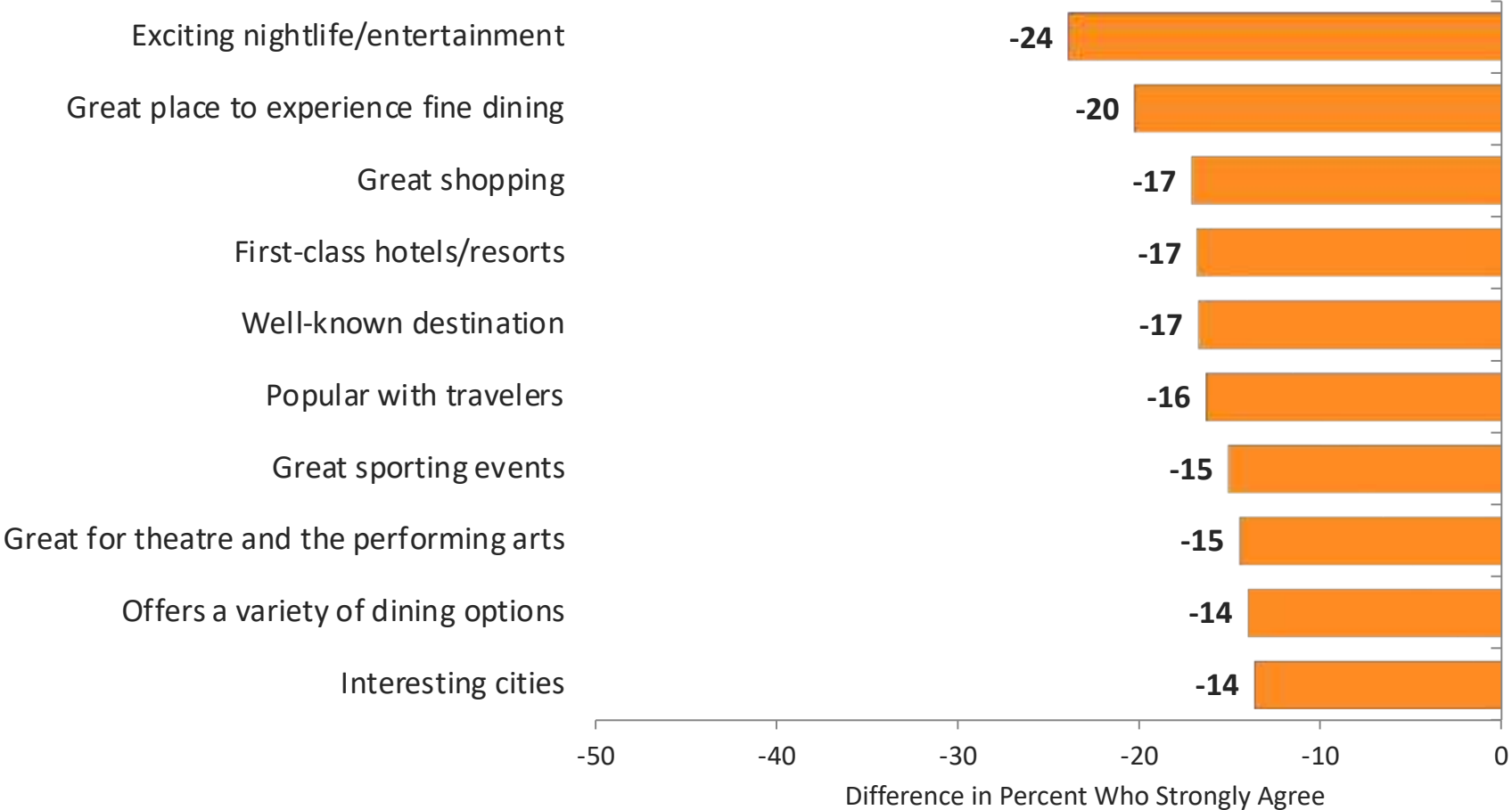
# Kentucky's Image Strengths vs. Georgia (Cont'd)





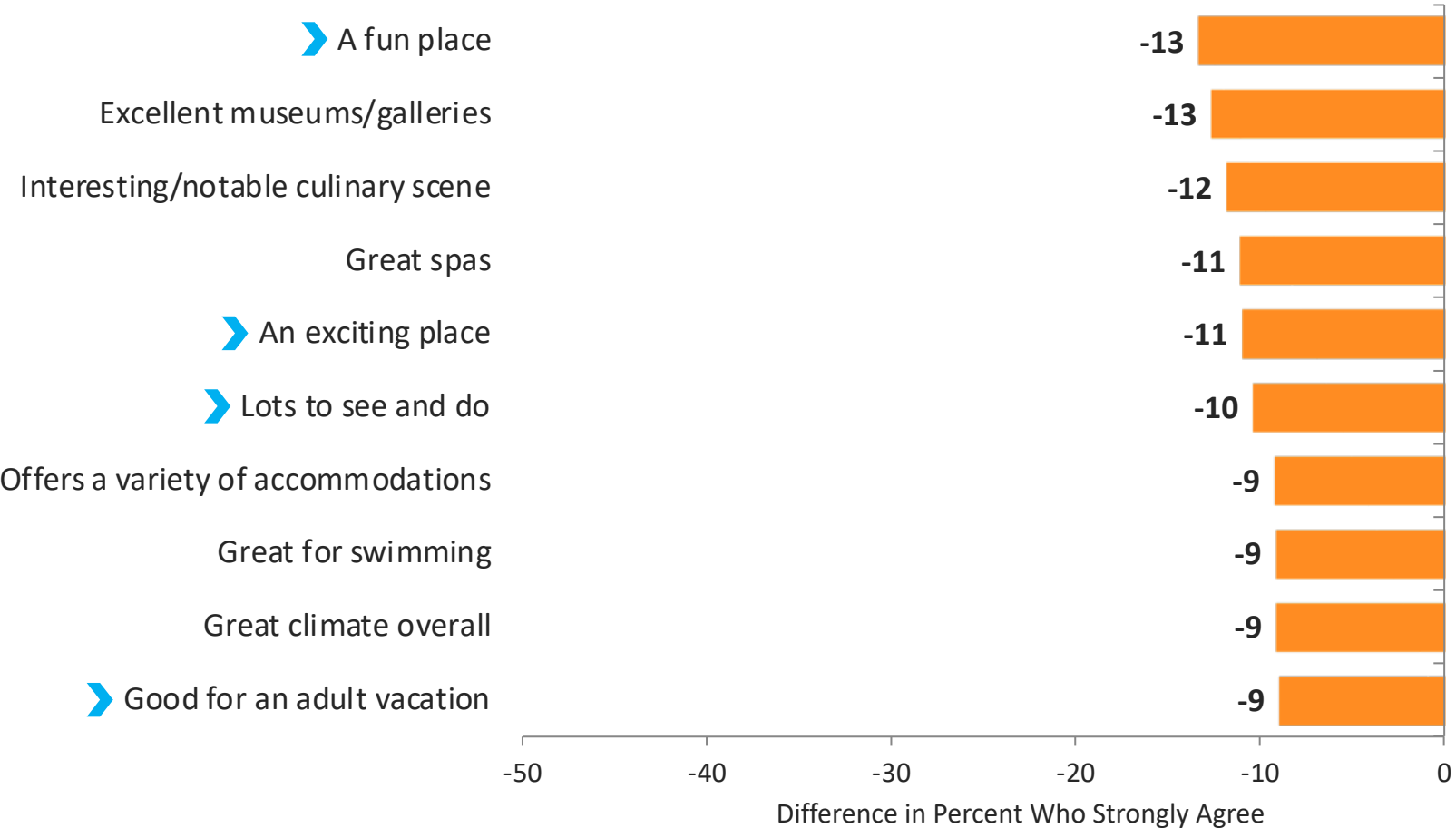
# Kentucky's Image Weaknesses vs. Georgia

Base: Existing Markets



# Kentucky's Image Weaknesses vs. Georgia (Cont'd)

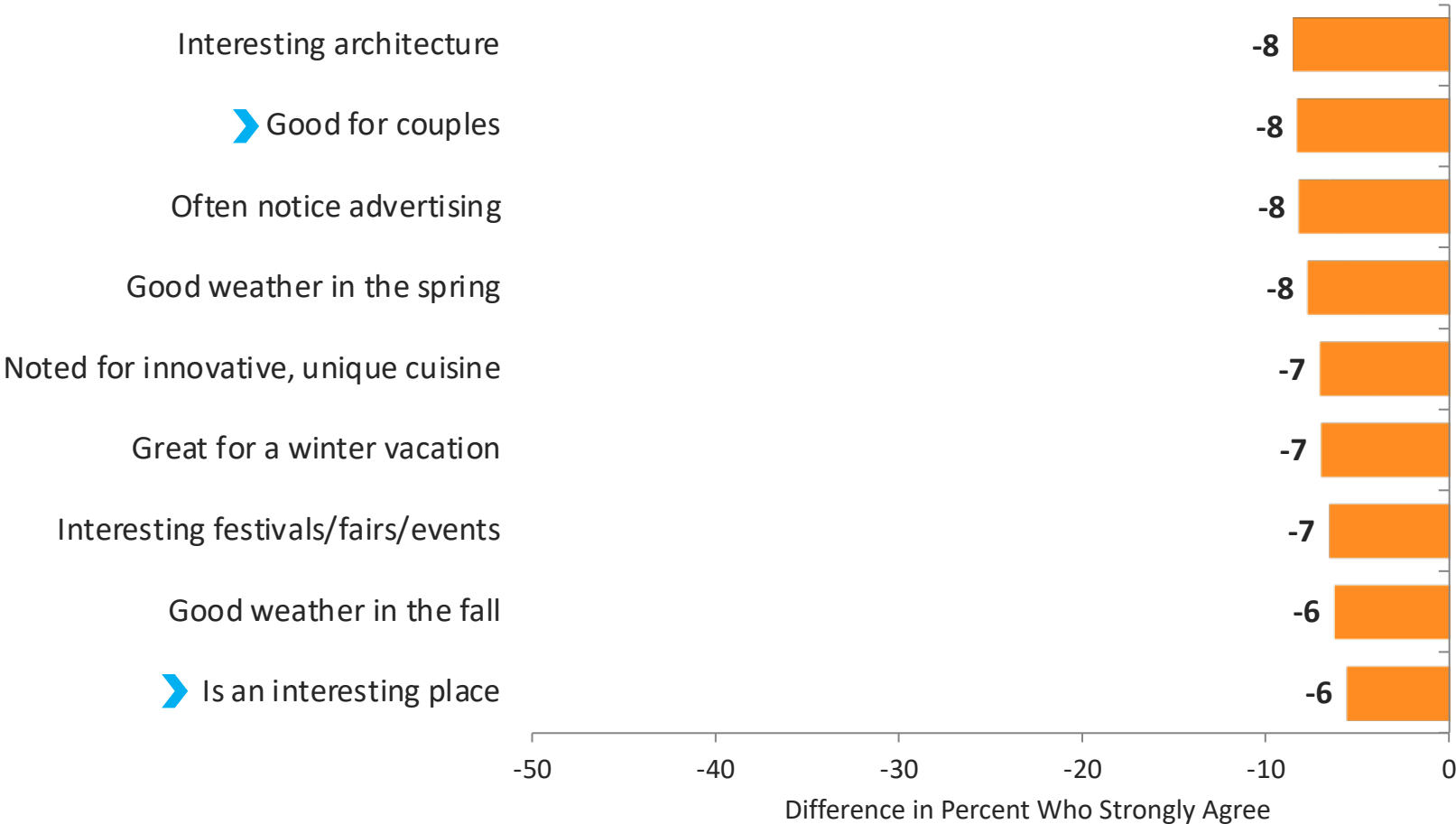
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. Georgia (Cont'd)

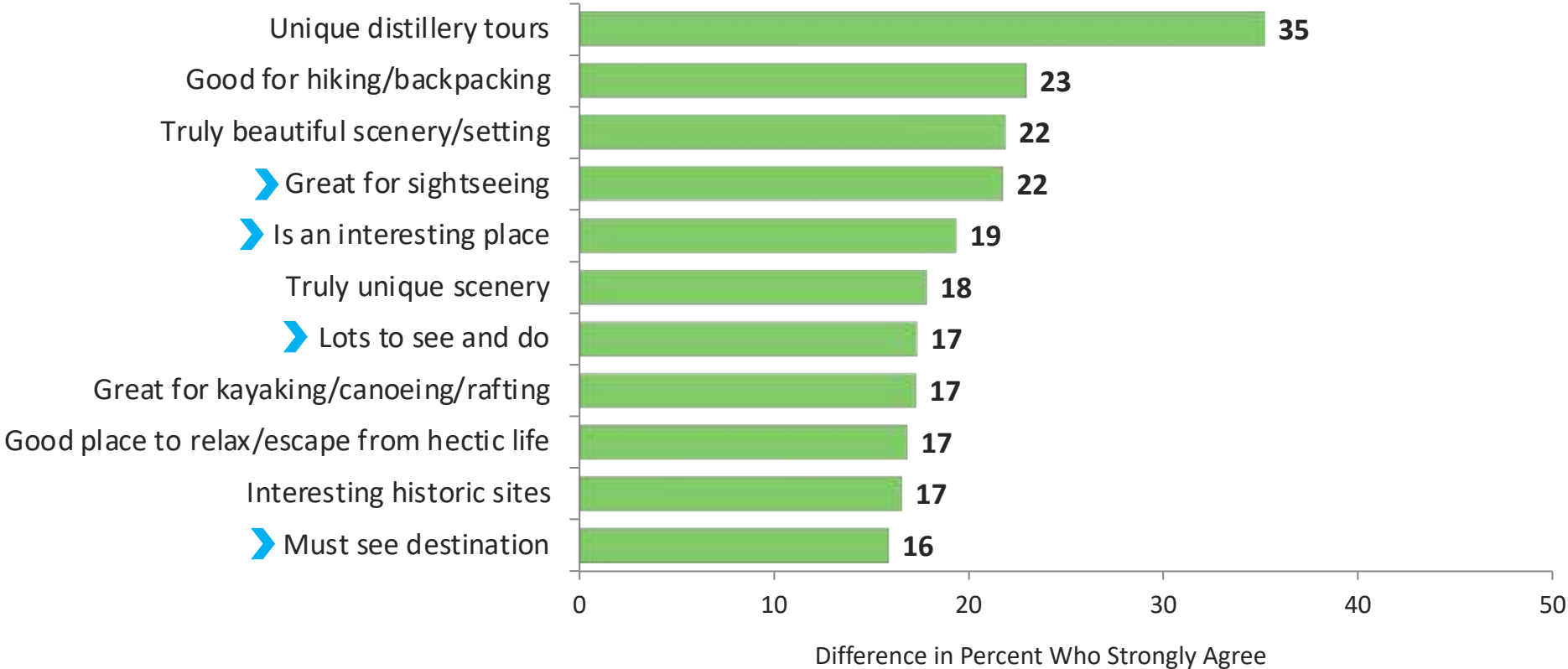
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana

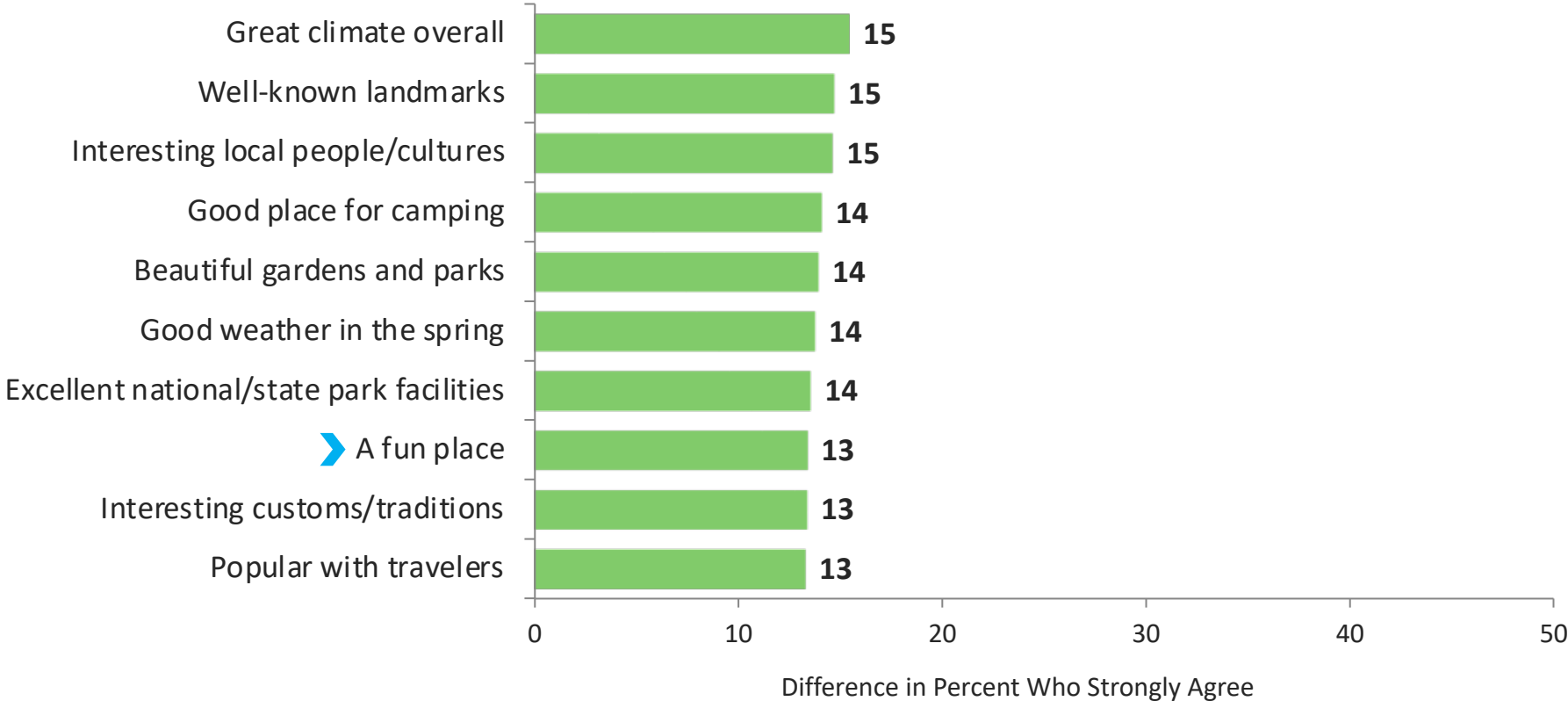
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana (Cont'd)

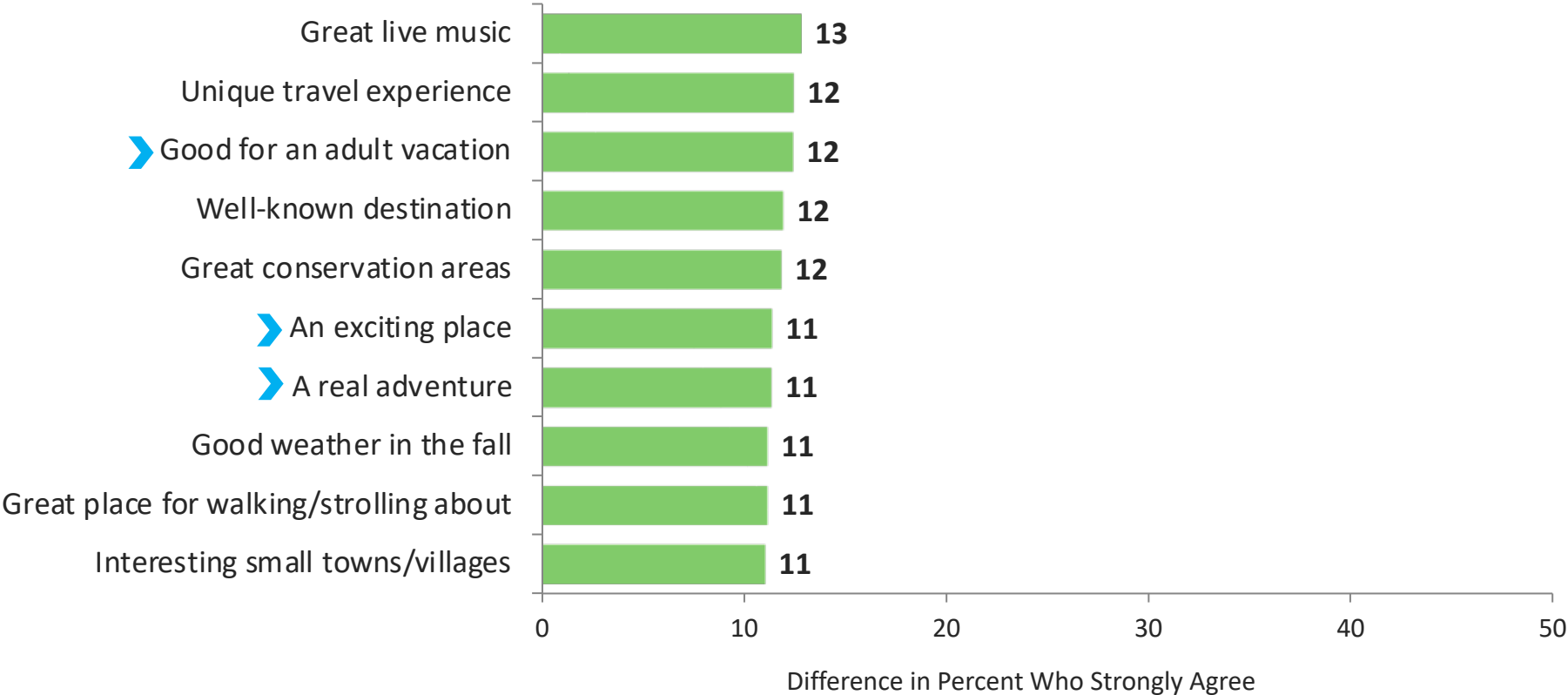
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana (Cont'd)

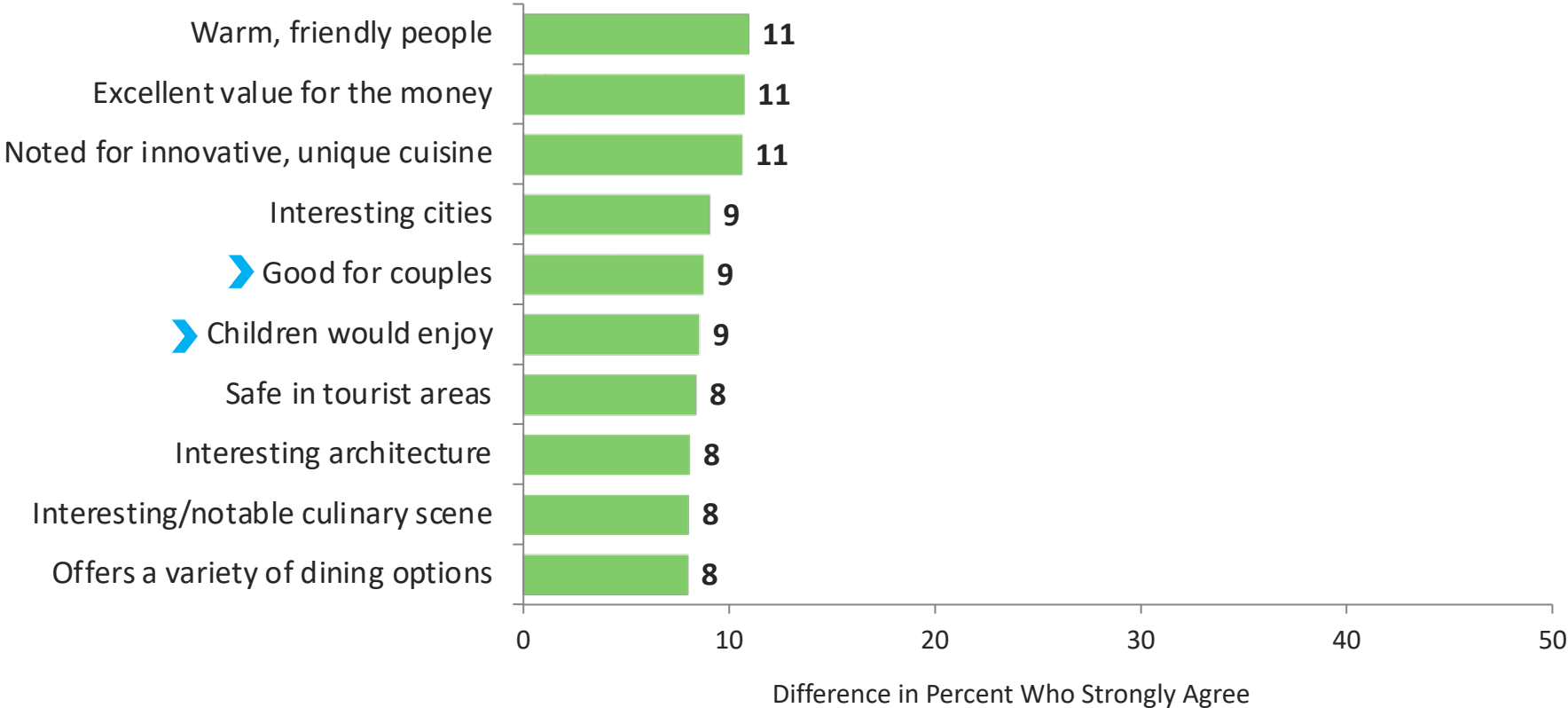
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana (Cont'd)

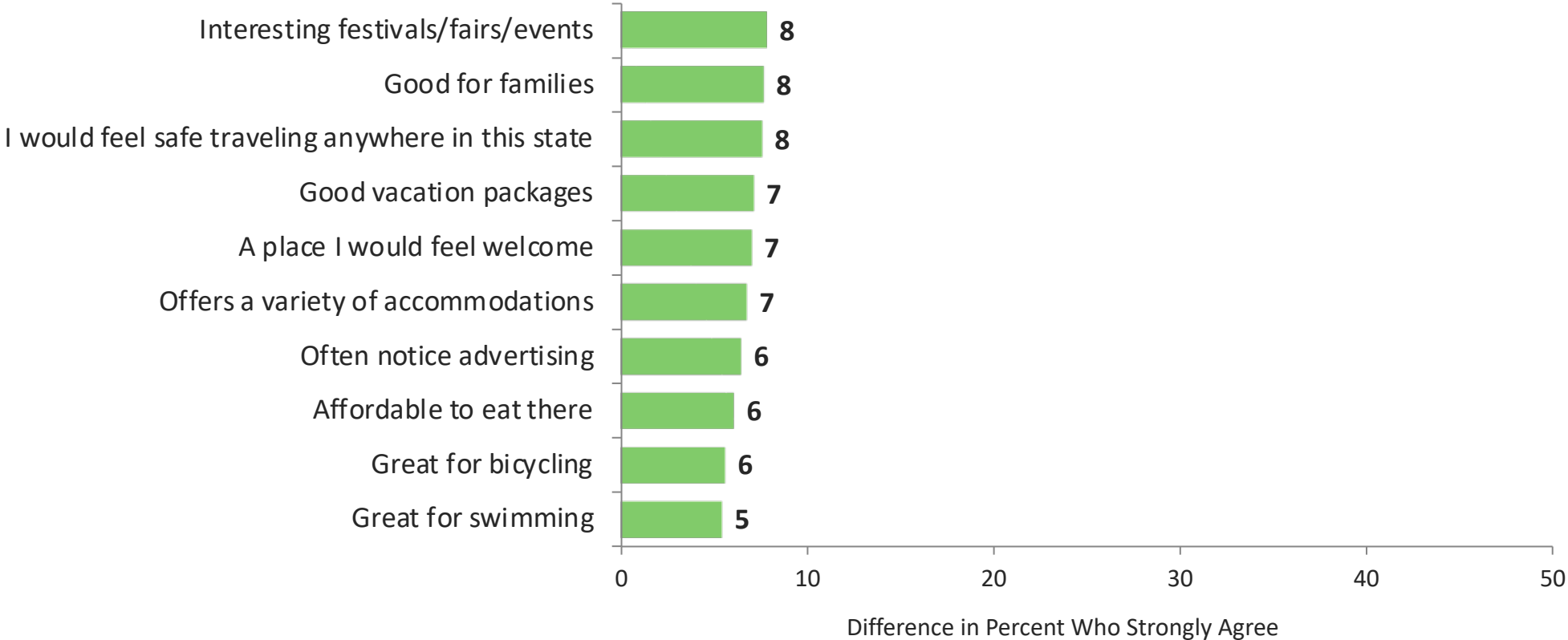
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Indiana (Cont'd)

Base: Existing Markets

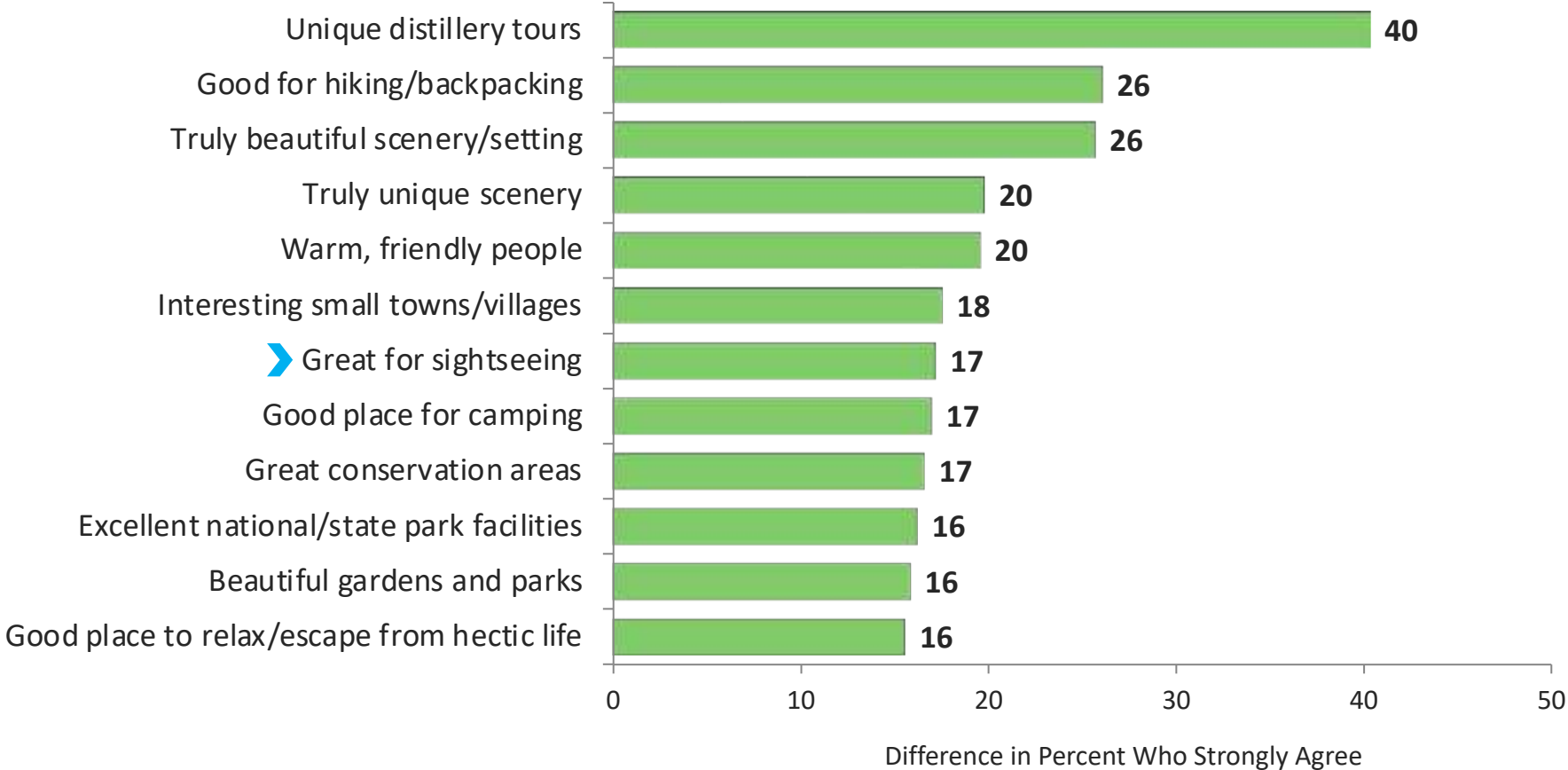




**THERE WERE NO SIGNIFICANT  
PERCEIVED IMAGE WEAKNESSES  
VS. INDIANA**

# Kentucky's Image Strengths vs. Ohio

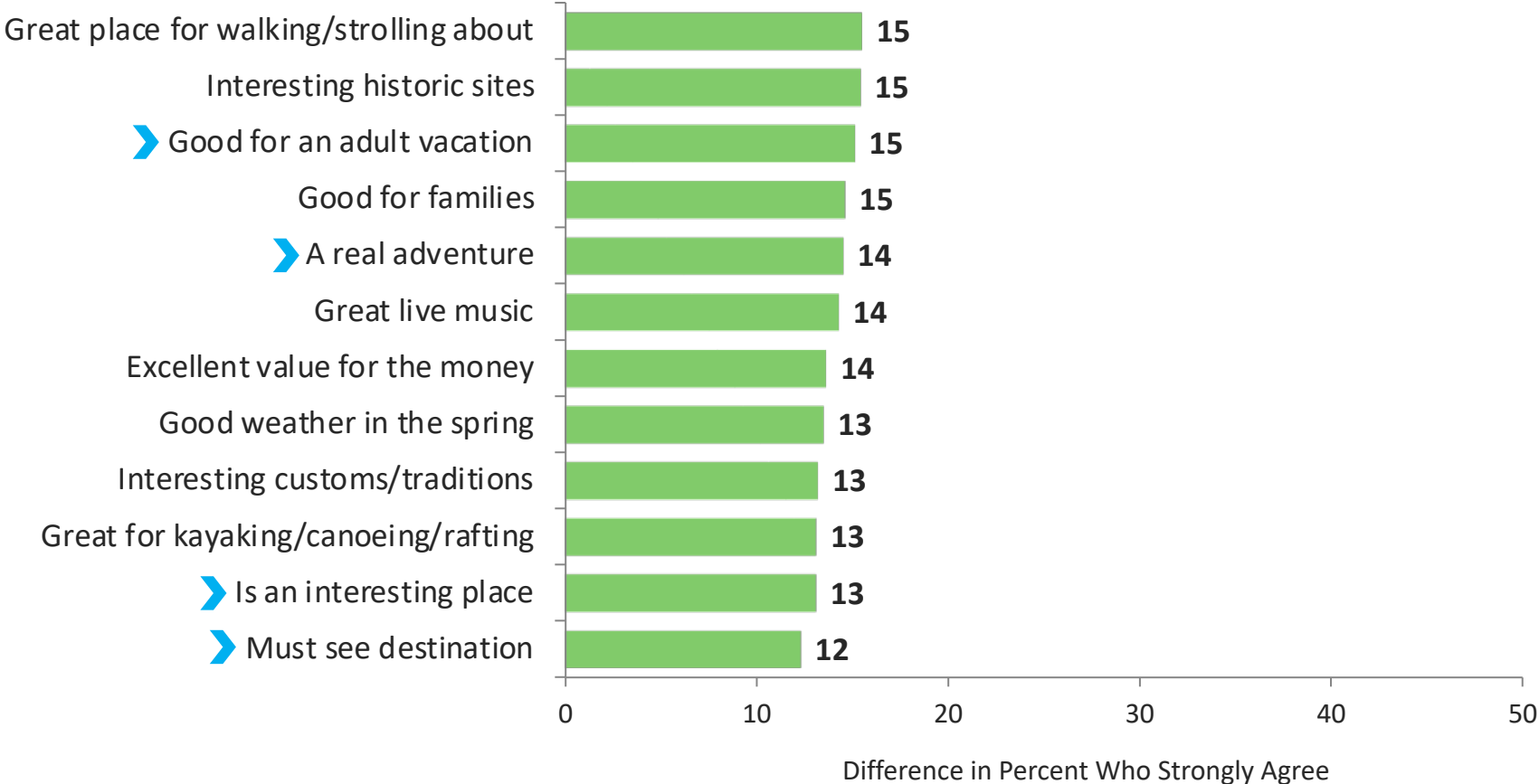
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Ohio (Cont'd)

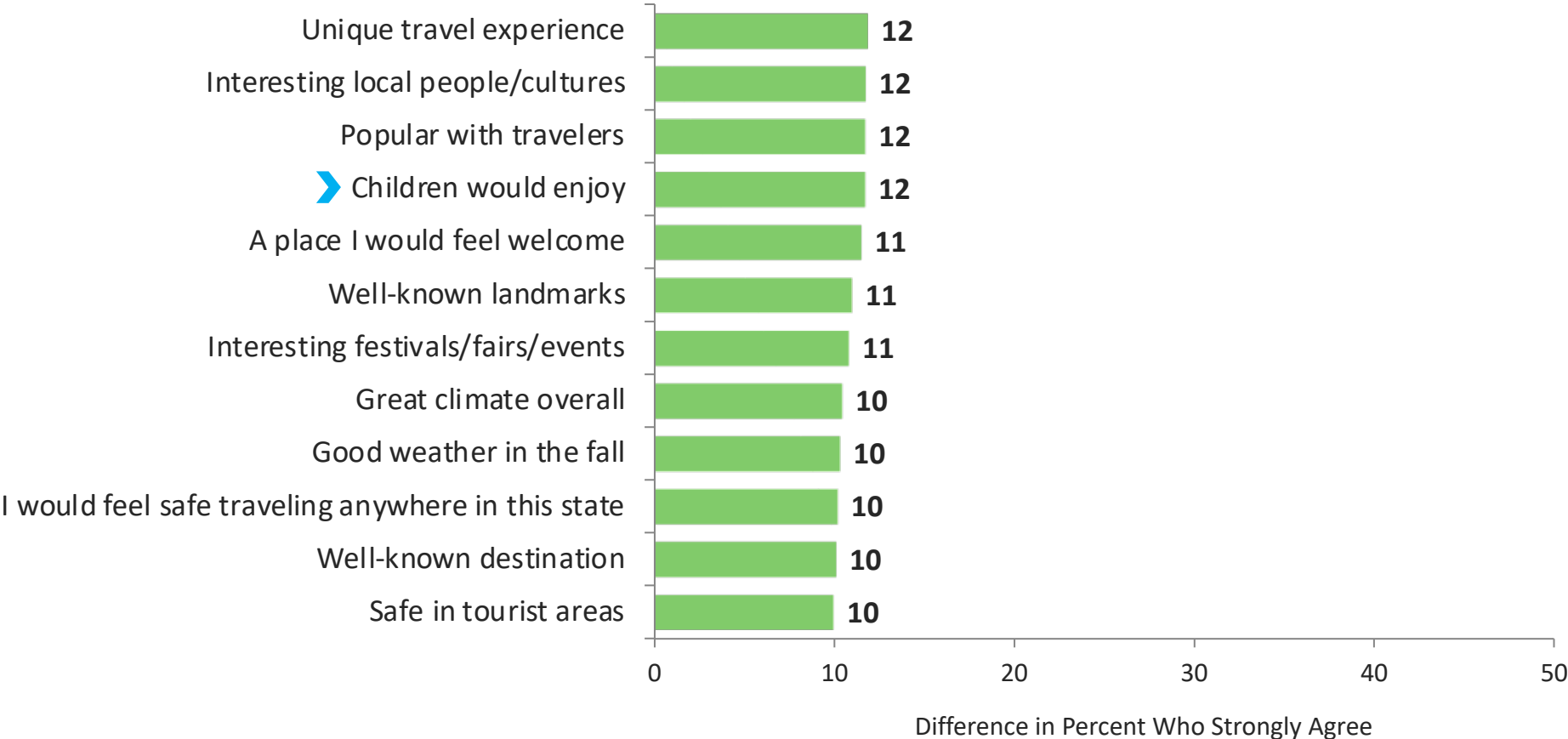
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Ohio (Cont'd)

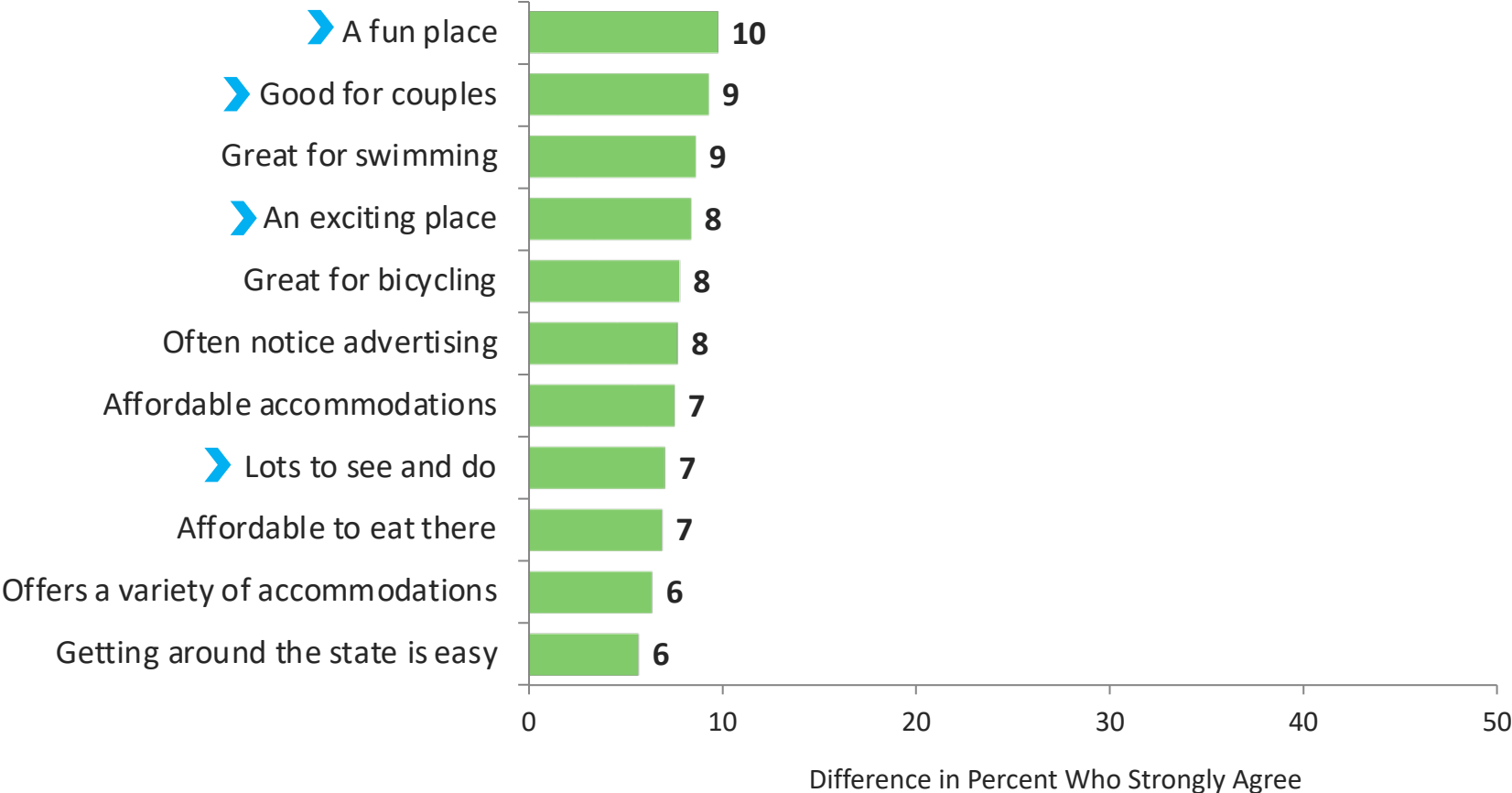
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Strengths vs. Ohio (Cont'd)

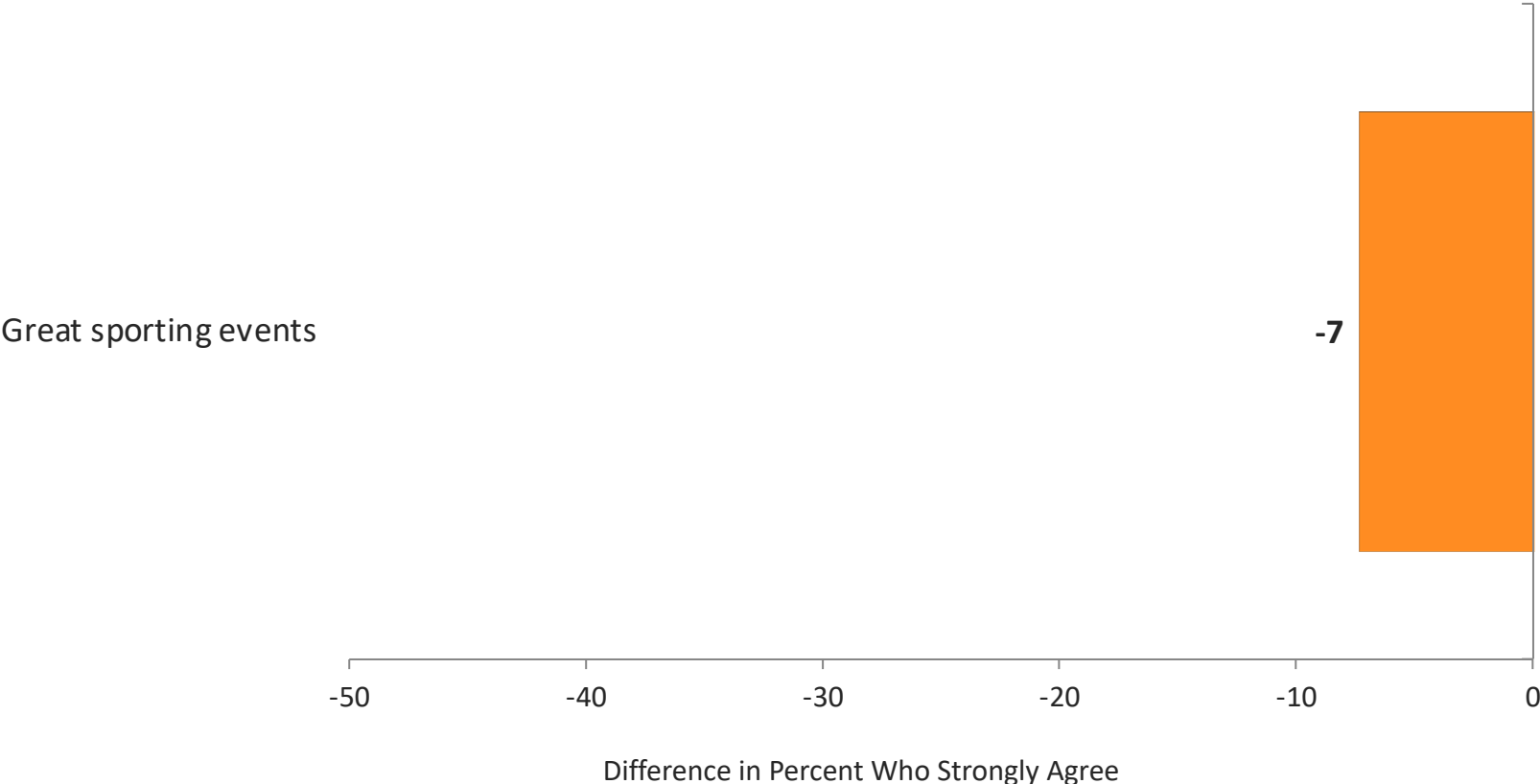
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

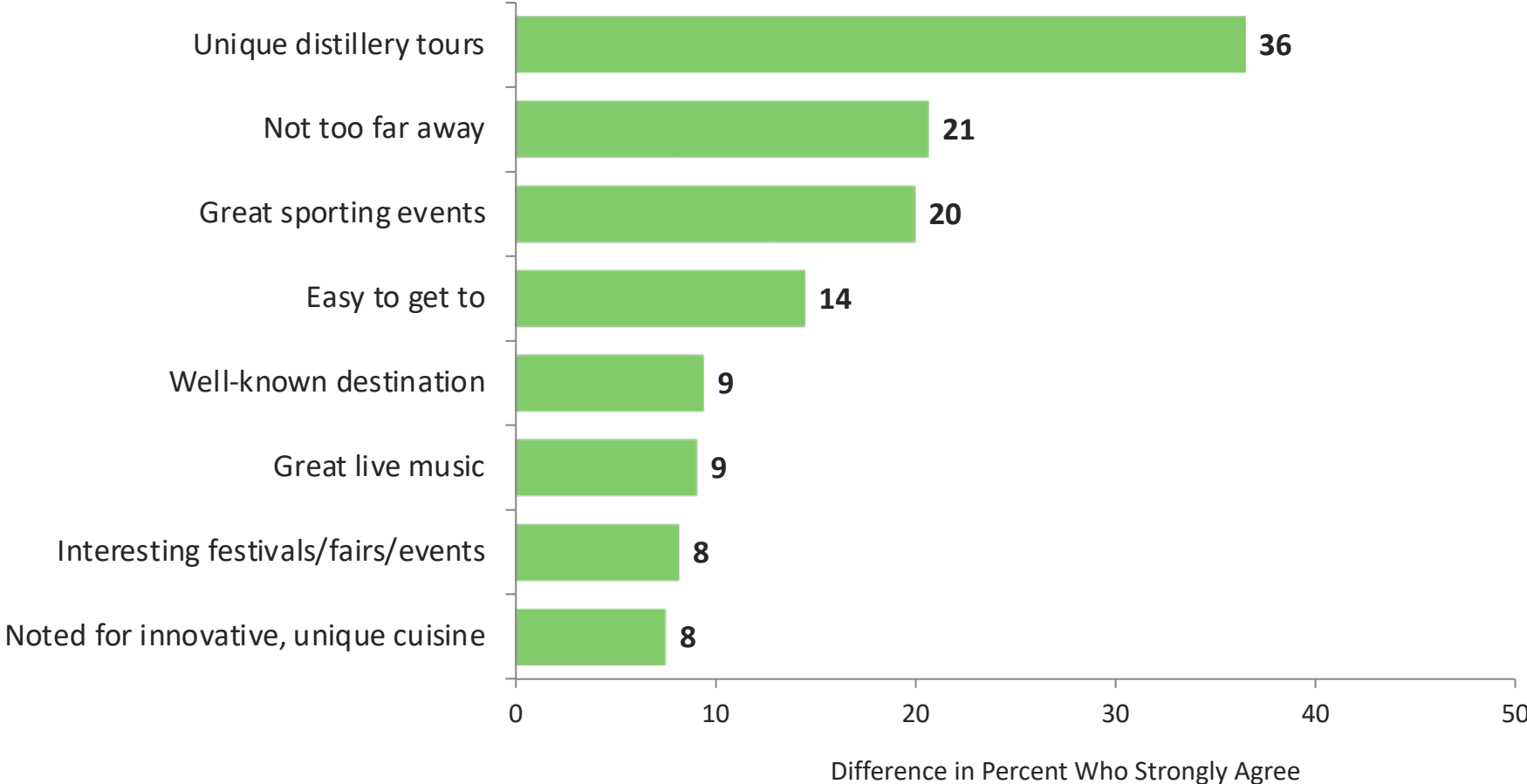
# Kentucky's Image Weaknesses vs. Ohio

Base: Existing Markets



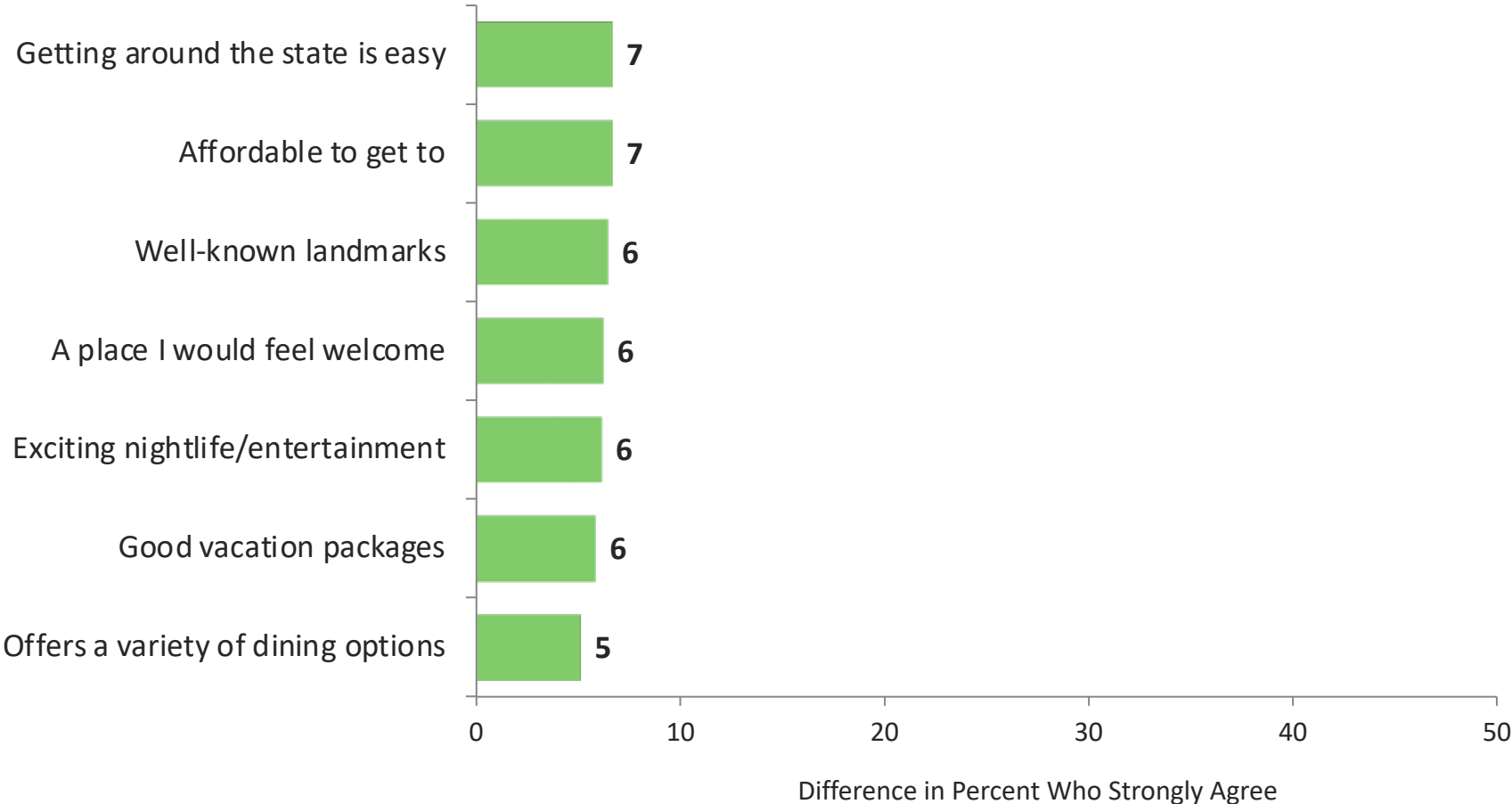
# Kentucky's Image Strengths vs. West Virginia

Base: Existing Markets



# Kentucky's Image Strengths vs. West Virginia (Cont'd)

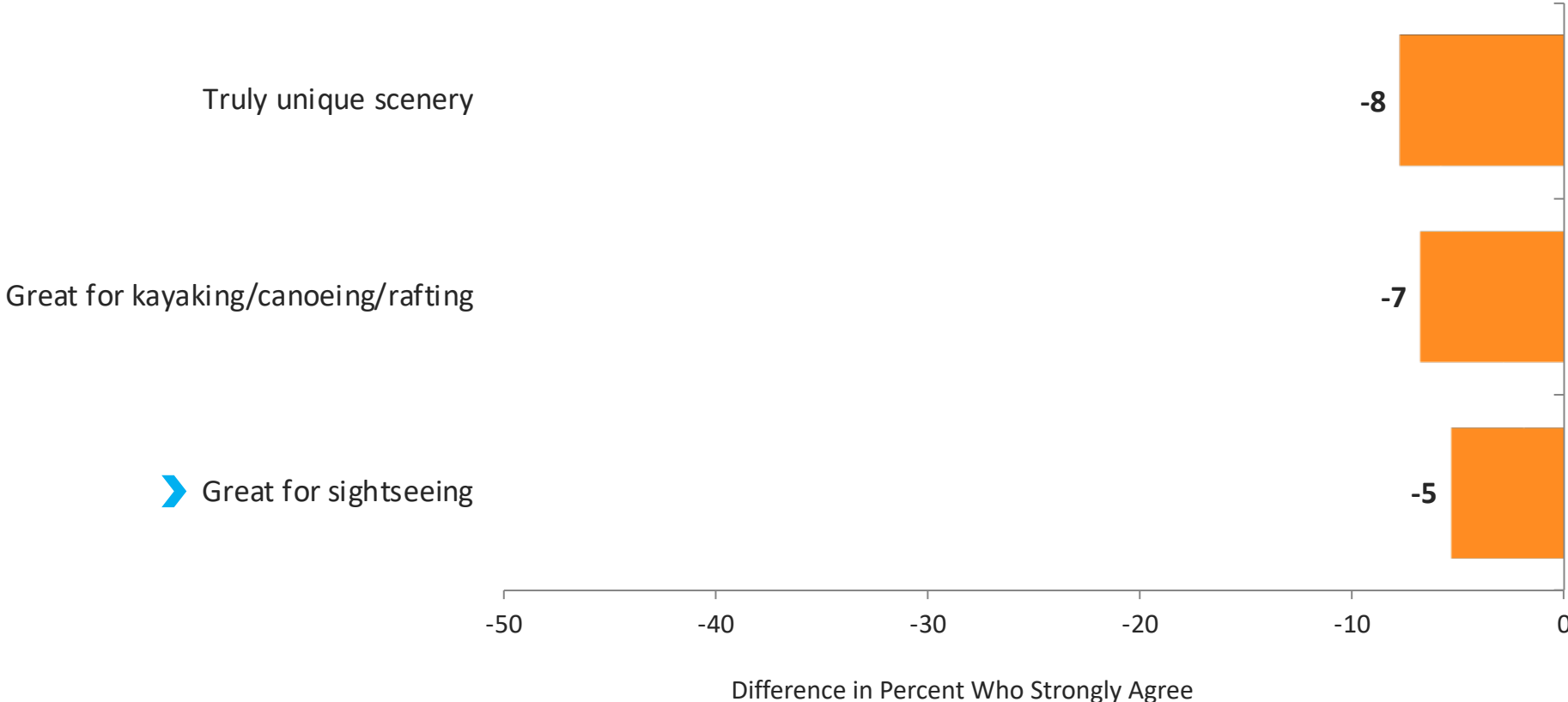
Base: Existing Markets





# Kentucky's Image Weaknesses vs. West Virginia

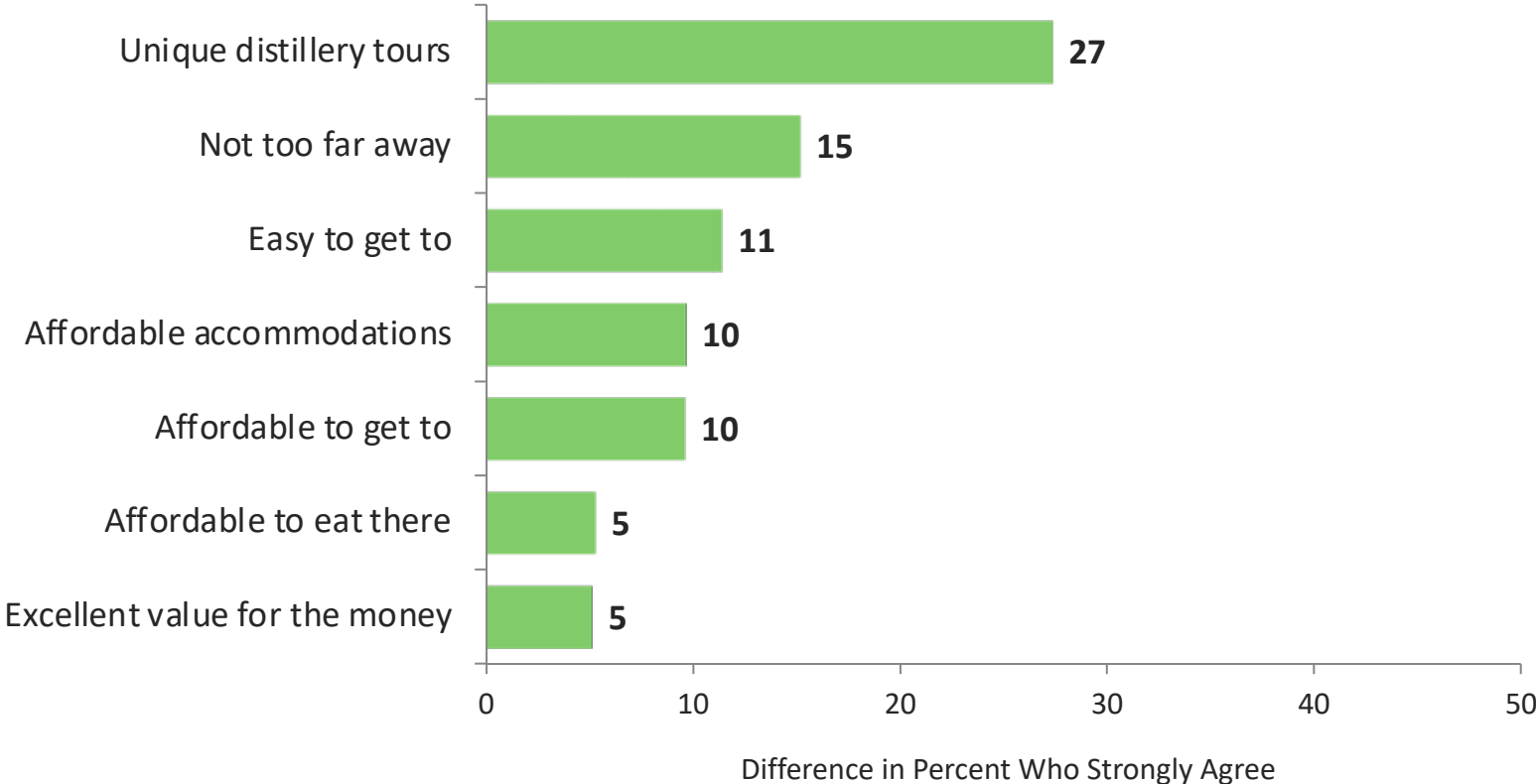
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

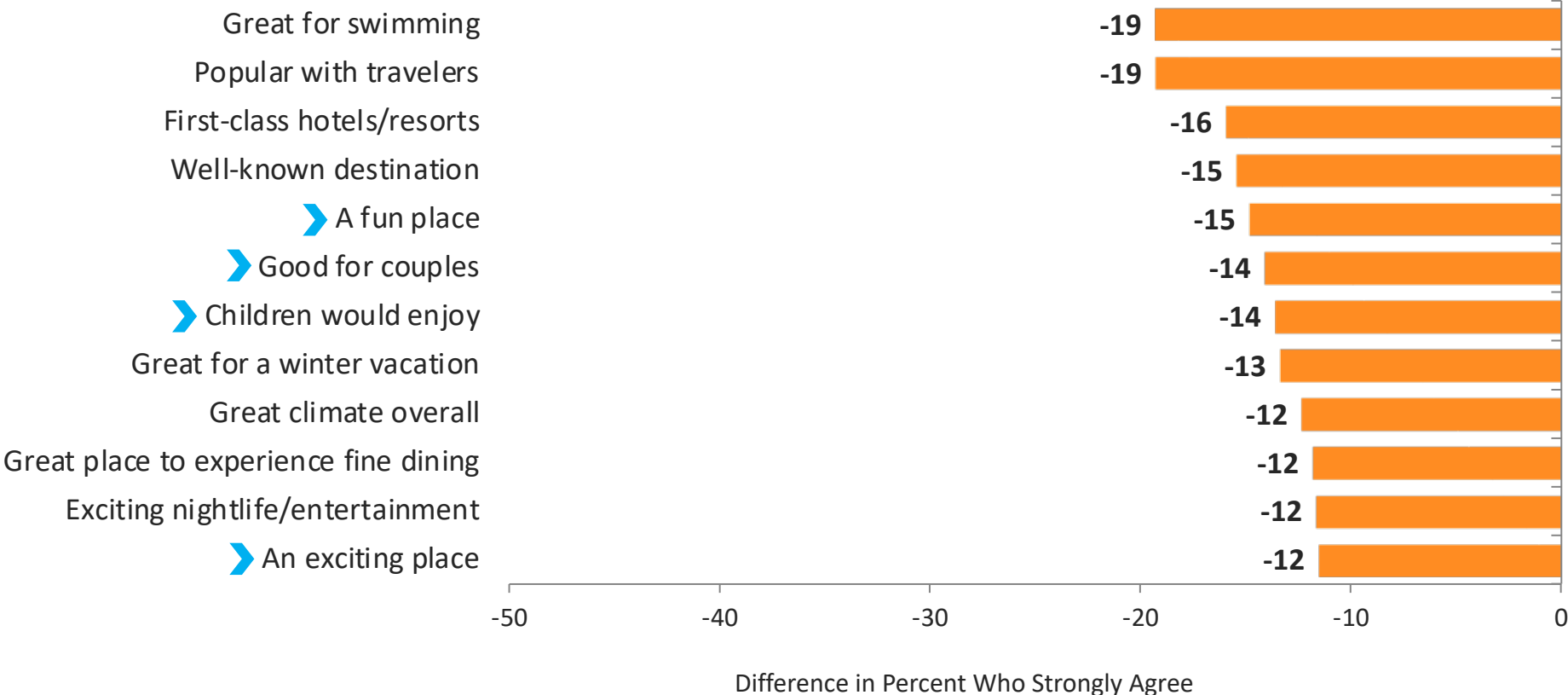
# Kentucky's Image Strengths vs. North Carolina

Base: Existing Markets



# Kentucky's Image Weaknesses vs. North Carolina

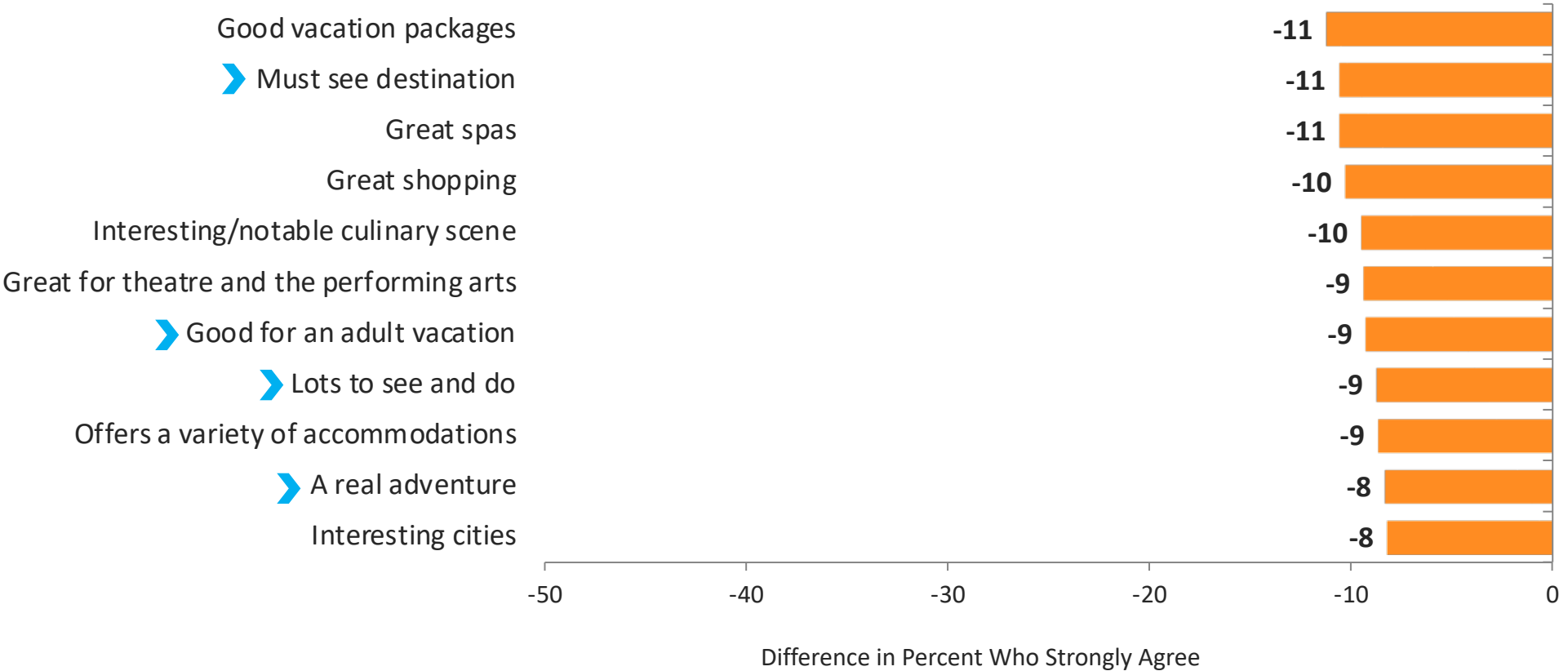
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

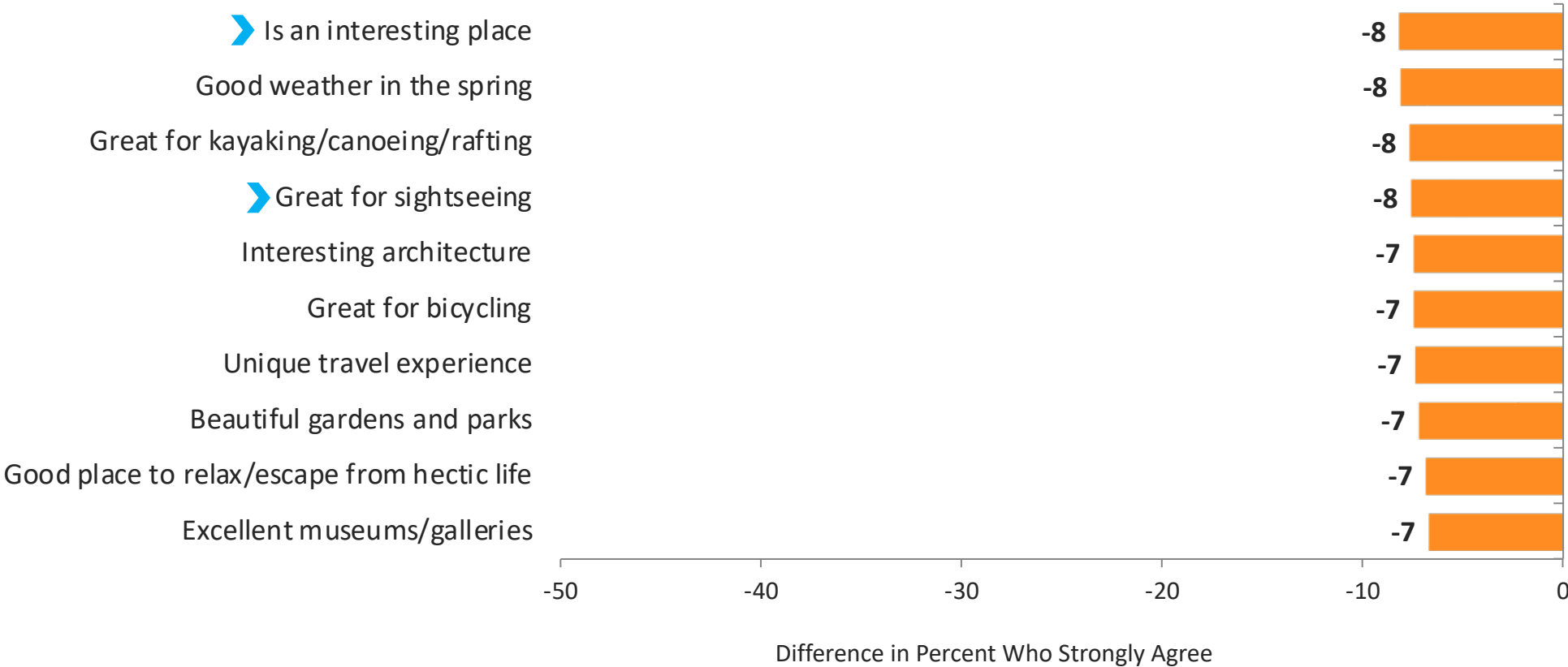
Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

Base: Existing Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Kentucky's Image Weaknesses vs. North Carolina (Cont'd)

Base: Existing Markets

