



Longwoods
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**Southern Indiana
Image and Halo Effect
Research**

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Background and Purpose

- Longwoods was engaged to conduct a program of research designed to provide Southern Indiana with data and insights into travelers' perceptions of Southern Indiana. This study specifically profiled:
 - Key travel motivators for Southern Indiana
 - Image of Southern Indiana in the areas that are important to travelers
 - Southern Indiana's image strengths and weaknesses versus competitors
 - Southern Indiana's image versus its product delivery
 - Awareness of Southern Indiana's tourism advertising
 - The "halo effect" of Southern Indiana's tourism advertising

Method

- A benchmark study was conducted to measure Southern Indiana’s image as compared to its competitors.
 - A national self-completion survey of 1,007 respondents in key DMAs, distributed as follows:

• Cincinnati	100
• Columbus, OH	111
• Dayton	50
• Evansville	32
• Indianapolis	130
• Fort Wayne	32
• Lafayette, IN	30
• Lexington	62
• Louisville*	70
• South Bend – Elkhart	40
• Peoria – Bloomington	30
• Detroit	200
• Grand Rapids – Kalamazoo – Battle Creek	90
• Lansing	30

Method (Cont'd)

- To qualify for the survey, respondents must have personally taken at least one day or overnight leisure trip in the past three years and intend to take at least one day or overnight leisure trip in the next two years.
- 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 DMAs, age, and sex.
- The fieldwork was conducted in April 2022.
- 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 DMAs.
- For a sample of this size, the confidence level is +/- 3%.

Method (Cont'd)

- During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey as not to bias earlier questions on attitudes towards Southern Indiana and other behavioral measures.
- In the survey, the destinations evaluated by respondents were labeled:
 - Southern Indiana (Clark and Floyd counties)
 - Hendricks County, Indiana
 - Hamilton County, Indiana
 - Northern Kentucky (Boone, Campbell and Kenton counties)
 - Dayton, Ohio
 - Owensboro, Kentucky



Conclusions and Recommendations

Conclusions and Recommendations

- Almost half of travelers in Southern Indiana's (SoIN) primary advertising markets recalled seeing at least one SoIN ad.
 - Ad awareness was strongest in the Lexington DMA, followed by Columbus, Indianapolis, and Louisville (excluding Clark and Floyd counties).
 - Travelers were more likely to remember a digital or social media ad, followed by print.
- Three in ten travelers within SoIN's key advertising markets have visited Southern Indiana during their lifetimes, and a third intend to visit during the next 12 months.
- Among travelers in Southern Indiana's target markets, for a destination to get on travelers' consideration list, it must, first and foremost, be perceived to be suitable for adults and couples, exciting, and having a great family atmosphere.
- The Hot Buttons are the ten individual image attributes tied to destination selection for Southern Indiana and its competitive set. Focusing on the Hot Buttons that best align with SoIN's marketing strategies will help convert interest to visitation. The ten Hot Buttons emerging from this study are: good for an adult vacation; a fun place for a vacation; lots of things to see and do; provides a unique vacation experience; a good place for families to visit; an exciting place; children would especially enjoy this place; good for couples; popular with vacationers; and well-known landmarks.

Conclusions and Recommendations (Cont'd)

- The SoIN campaign had a very positive impact on travelers' perceptions of Southern Indiana. The campaign did an excellent job of improving people's perceptions of Southern Indiana for all ten Hot Buttons. In fact, there are no variables where significantly more travelers unaware of the advertising rated Southern Indiana higher than those who were aware of SoIN's campaign.
- Relative to the other destinations in the competitive set for this study, Southern Indiana has a positive overall image among travelers. Across the markets surveyed, four in ten rated Southern Indiana very favorably as a destination they "would really enjoy visiting."
- Looking at the travel motivators overall, SoIN is evenly matched with its combined competition, with Northern Kentucky as the most competitive destination to Southern Indiana.
- When we compare the image ratings of people who have never visited Southern Indiana 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. Travelers who visited Southern Indiana recently rated all ten Hot Buttons higher than those who have never been to Southern Indiana. And among the dimensions evaluated, there were no areas where visitors felt Southern Indiana failed to live up to expectations.

Conclusions and Recommendations (Cont'd)

- The research compared consumers' ratings of Southern Indiana on economic development image attributes by those who had not seen the campaign or visited Southern Indiana with those who did see the tourism ads and/or visited. SoIN's tourism advertising and subsequent visitation significantly improved the image of Southern Indiana for the wide range of economic development objectives included in the study.



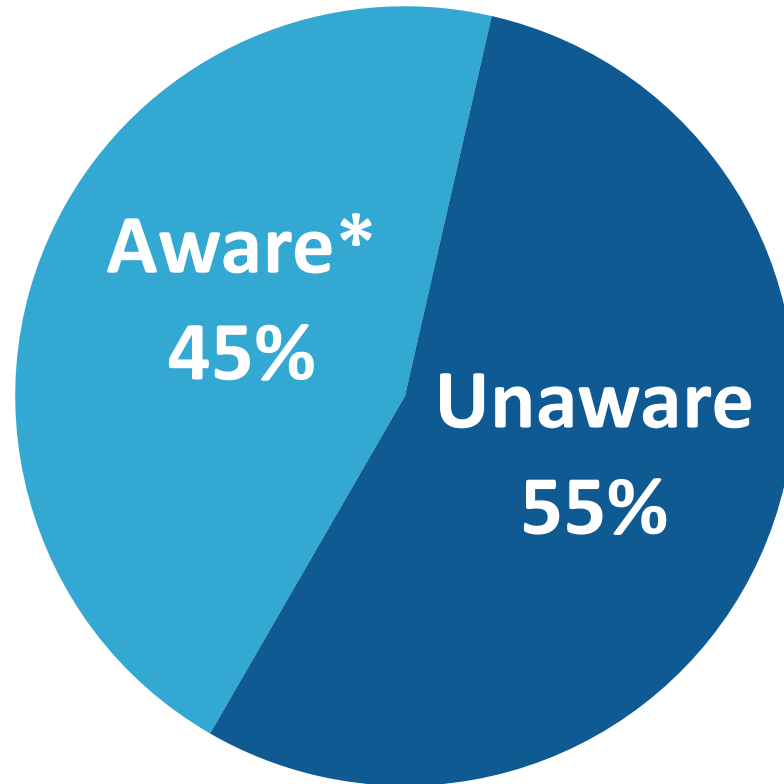
Main Findings: Advertising Awareness

Advertising Awareness

- Almost half (45%) of travelers in Southern Indiana's (SoIN) primary advertising markets recalled seeing at least one SoIN ad.
- Ad awareness was strongest in the Lexington DMA (62%), followed by Columbus (53%), Indianapolis (52%), and Louisville (excluding Clark and Floyd counties, 51%). The Grand Rapids DMA had the lowest ad awareness at 28%.
- Travelers were more likely to remember a digital (41%) or social media (40%) ad, followed by print (22%).
- The ads with the highest level of recall were:
 - Pinterest Compilation 6 (26%)
 - Pinterest Compilation 2 (26%)
 - Pinterest Compilation 5 (23%)
 - Summer & Fall Lead Compilation (23%)
 - Pinterest Compilation 3 (22%)
 - Indiana Visitors Guide (22%)
 - Pinterest Compilation 1 (22%)
 - Summer Traffic Compilation (22%)

Awareness of the Ad Campaign

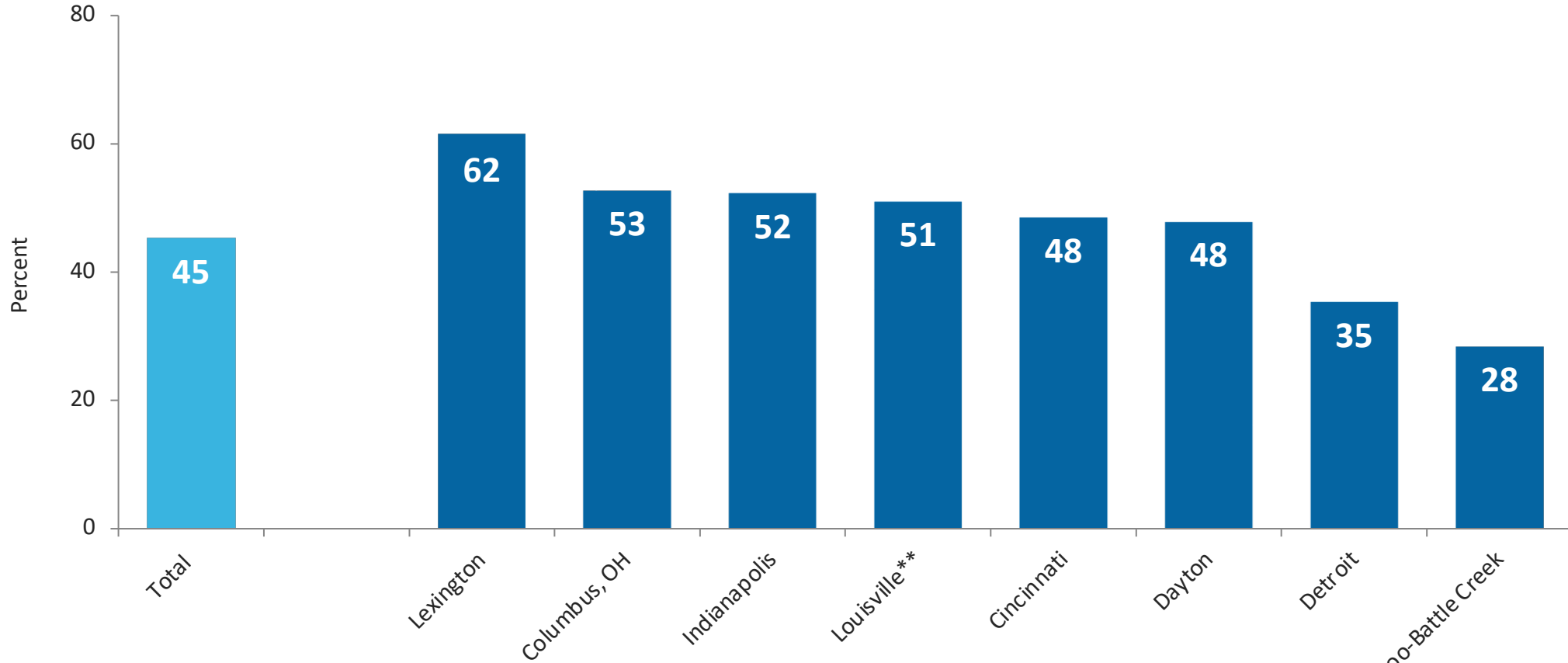
Base: Residents of Southern Indiana's Regional Advertising Markets



*Saw at least one ad

Awareness* by Market

Base: Residents of Southern Indiana's Regional Advertising Markets

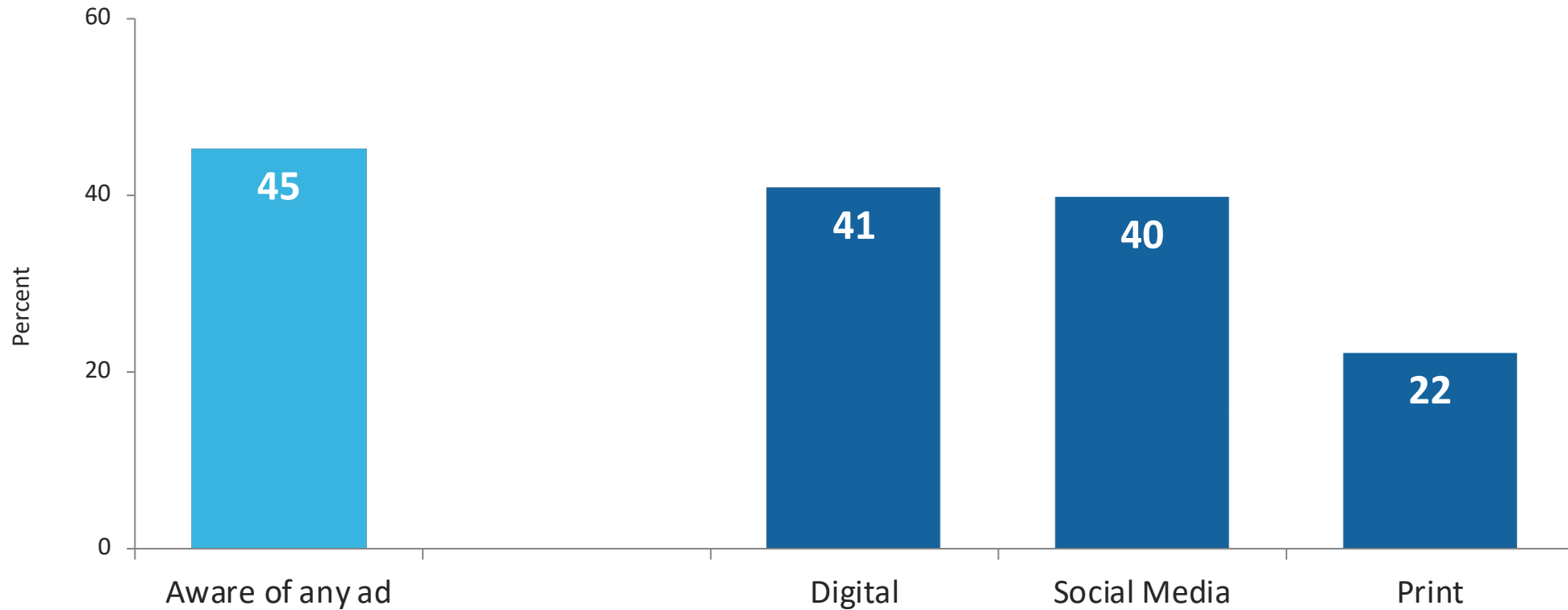


*Saw at least one ad; Low sample <200, please note no market with less than 50 respondents is charted

**Excludes Clark and Floyd Counties

Advertising Awareness* by Medium

Base: Residents of Southern Indiana's Regional Advertising Markets



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

Digital Creative



Louisville Visitor Guide

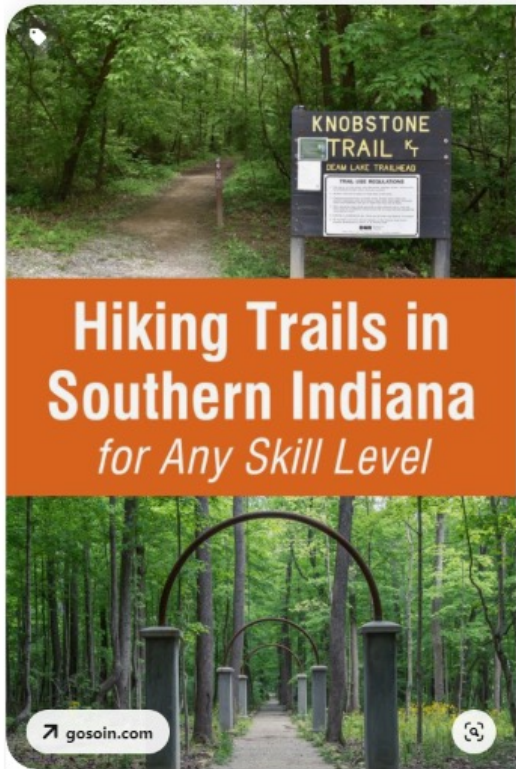


Pinterest Compilation 1

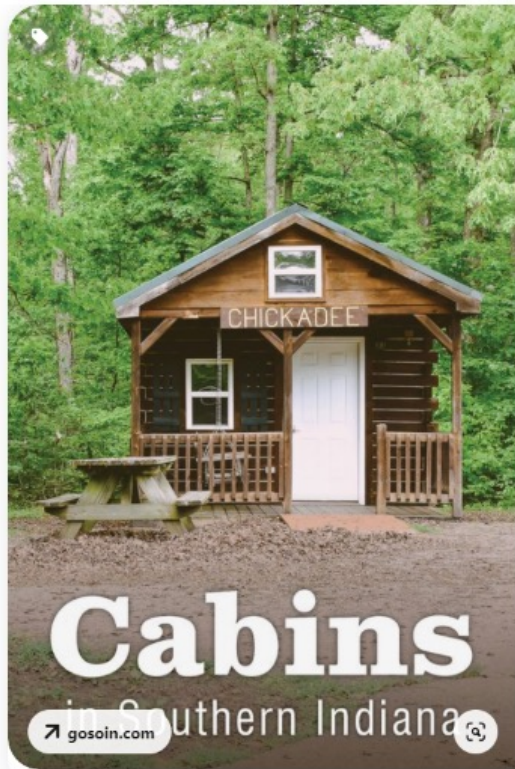


Pinterest Compilation 2

Digital Creative (Cont'd)



Pinterest Compilation 3



Pinterest Compilation 4



Digital Creative (Cont'd)



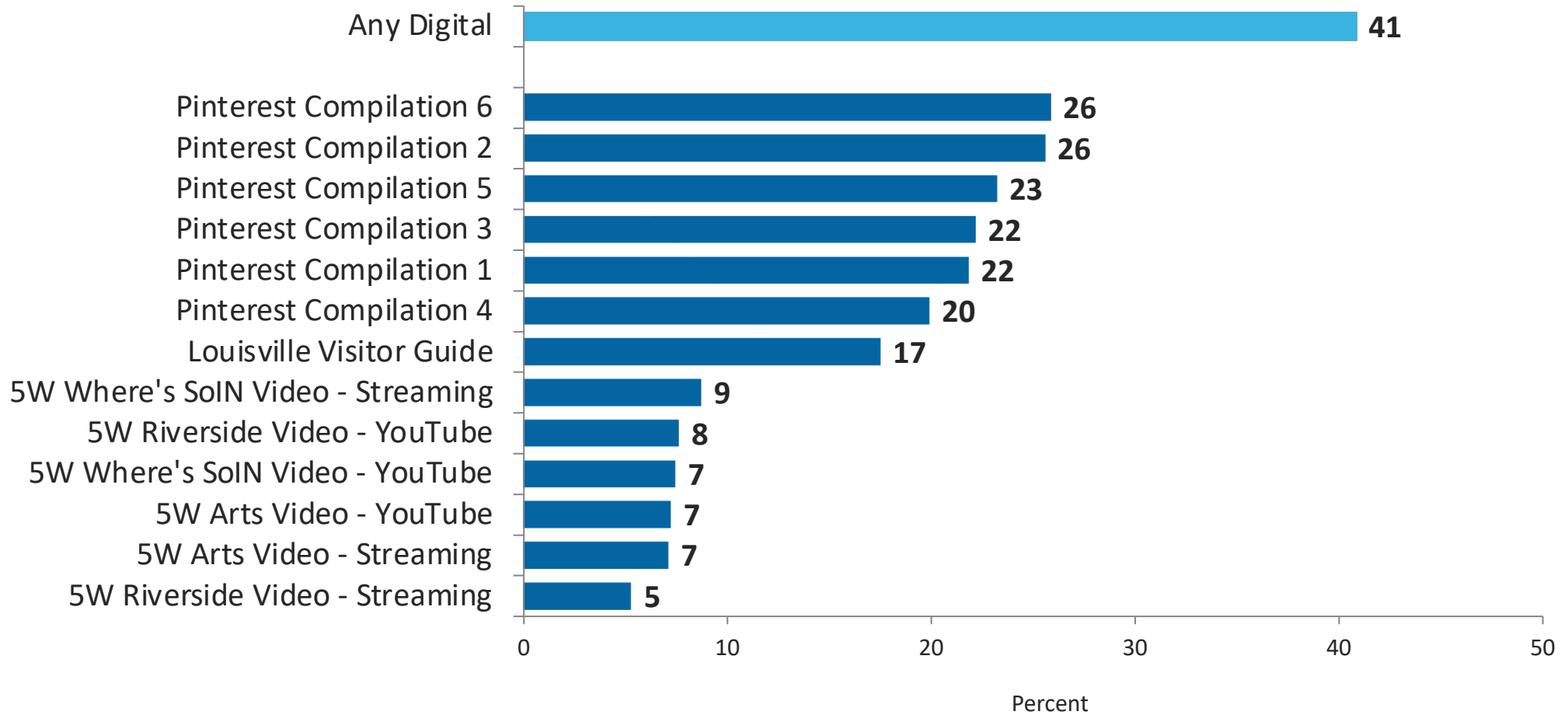
Pinterest Compilation 5



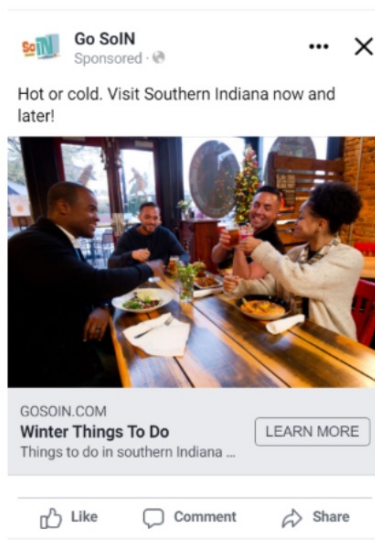
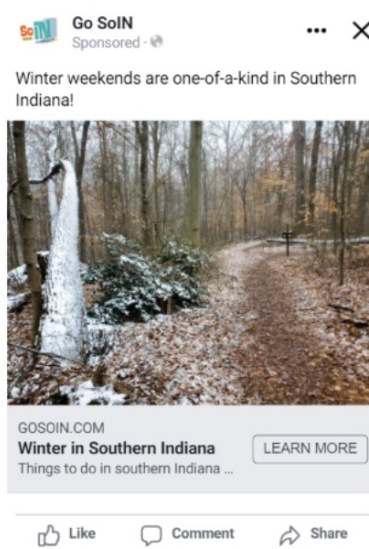
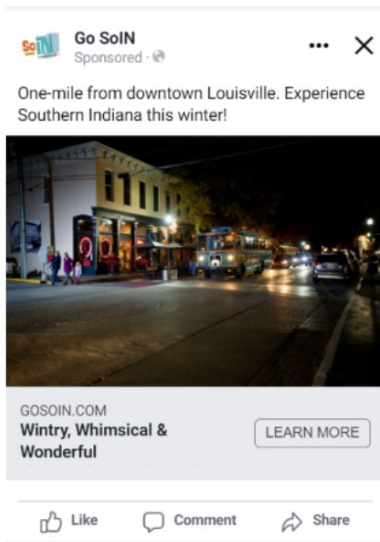
Pinterest Compilation 6

Awareness of Individual Ads* - Digital

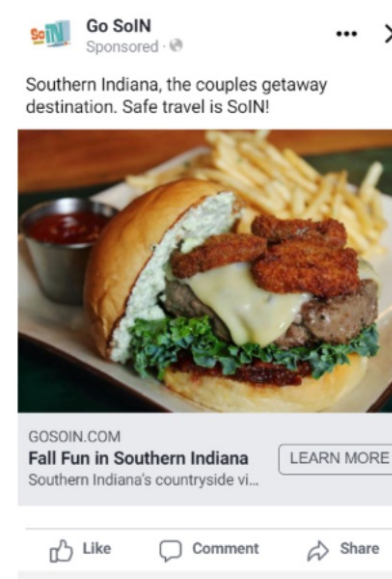
Base: Residents of Southern Indiana's Regional Advertising Markets



Social Media Creative

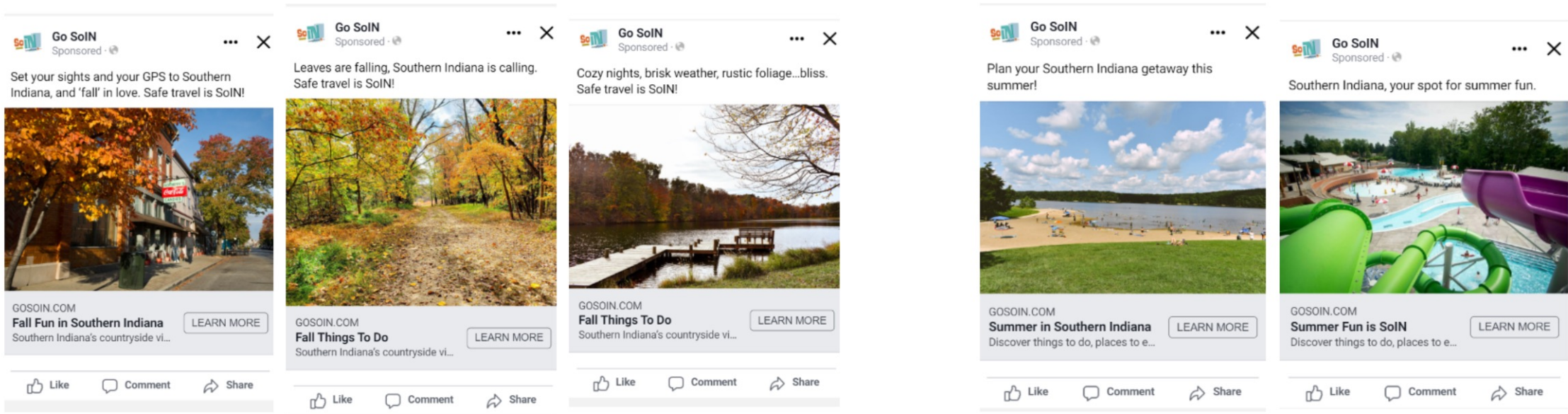


Winter Traffic Compilation



Fall Traffic Compilation 1

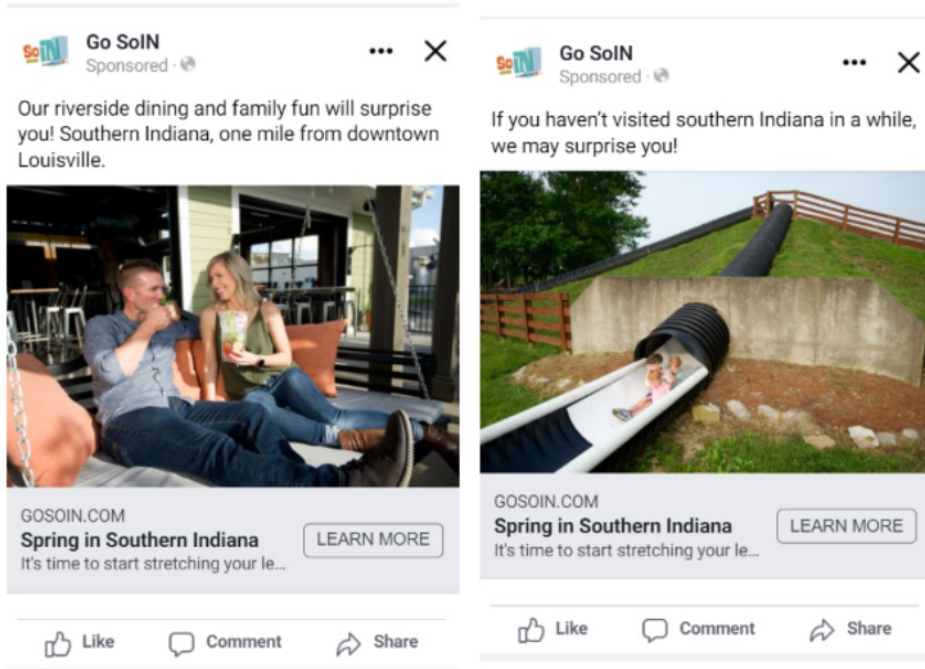
Social Media Creative (Cont'd)



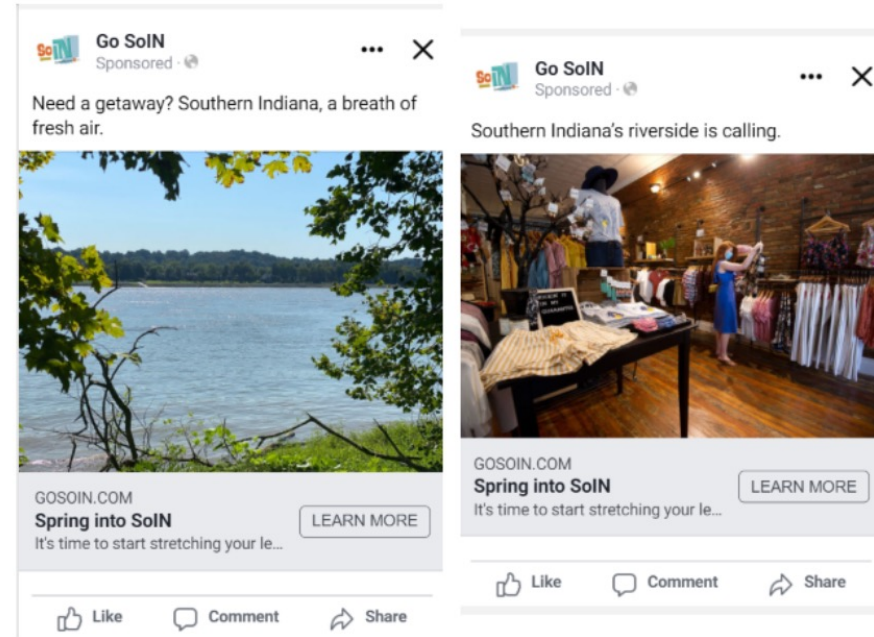
Fall Traffic Compilation 2

Summer Traffic Compilation

Social Media Creative (Cont'd)



Spring Traffic Compilation 1



Spring Traffic Compilation 2

Social Media Creative (Cont'd)

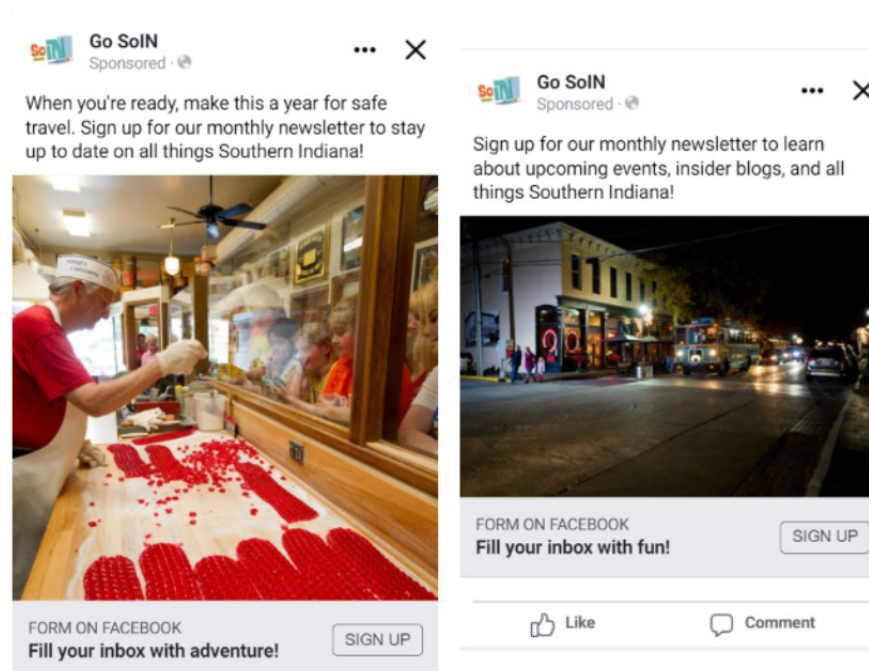
The image shows two side-by-side Facebook ad creatives for 'Go SoIN'. Each ad features the 'Go SoIN' logo, a 'Sponsored' tag, and a close button. The first ad has a background image of a forest path and a black signpost with the number '6' and an arrow. The text reads: 'Explore Southern Indiana's rolling hills and vistas! Make this a year for safe travel. Sign up for our monthly newsletter to see what makes Southern Indiana SoIN!'. Below the image is a grey bar with the text 'FORM ON FACEBOOK Fill your inbox with adventure!' and a 'SIGN UP' button. The second ad has a background image of a lake with a statue of two figures. The text reads: 'When you're ready, make this a year for safe travel. Sign up for our monthly newsletter to stay up to date on all things southern Indiana!'. Below the image is a grey bar with the text 'FORM ON FACEBOOK Your weekend getaway destination!' and a 'SIGN UP' button. Both ads have 'Like' and 'Comment' icons at the bottom.

Spring Lead Compilation

The image shows two side-by-side Facebook ad creatives for 'Go SoIN'. Each ad features the 'Go SoIN' logo, a 'Sponsored' tag, and a close button. The first ad has a background image of a dirt path through a forest with autumn foliage. The text reads: 'Explore Southern Indiana's rolling hills and vistas! Make this a year for safe travel. Sign up for our monthly newsletter to see ...See more'. Below the image is a grey bar with the text 'FORM ON FACEBOOK Fill your inbox with fun!' and a 'SIGN UP' button. The second ad has a background image of a large, ornate yellow building. The text reads: 'When you're ready, make this a year for safe travel. Sign up for our monthly newsletter to stay up to date on all things southern Indiana!'. Below the image is a grey bar with the text 'FORM ON FACEBOOK Your weekend getaway destination!' and a 'SIGN UP' button. Both ads have 'Like', 'Comment', and 'Share' icons at the bottom.

Summer & Fall Lead Compilation

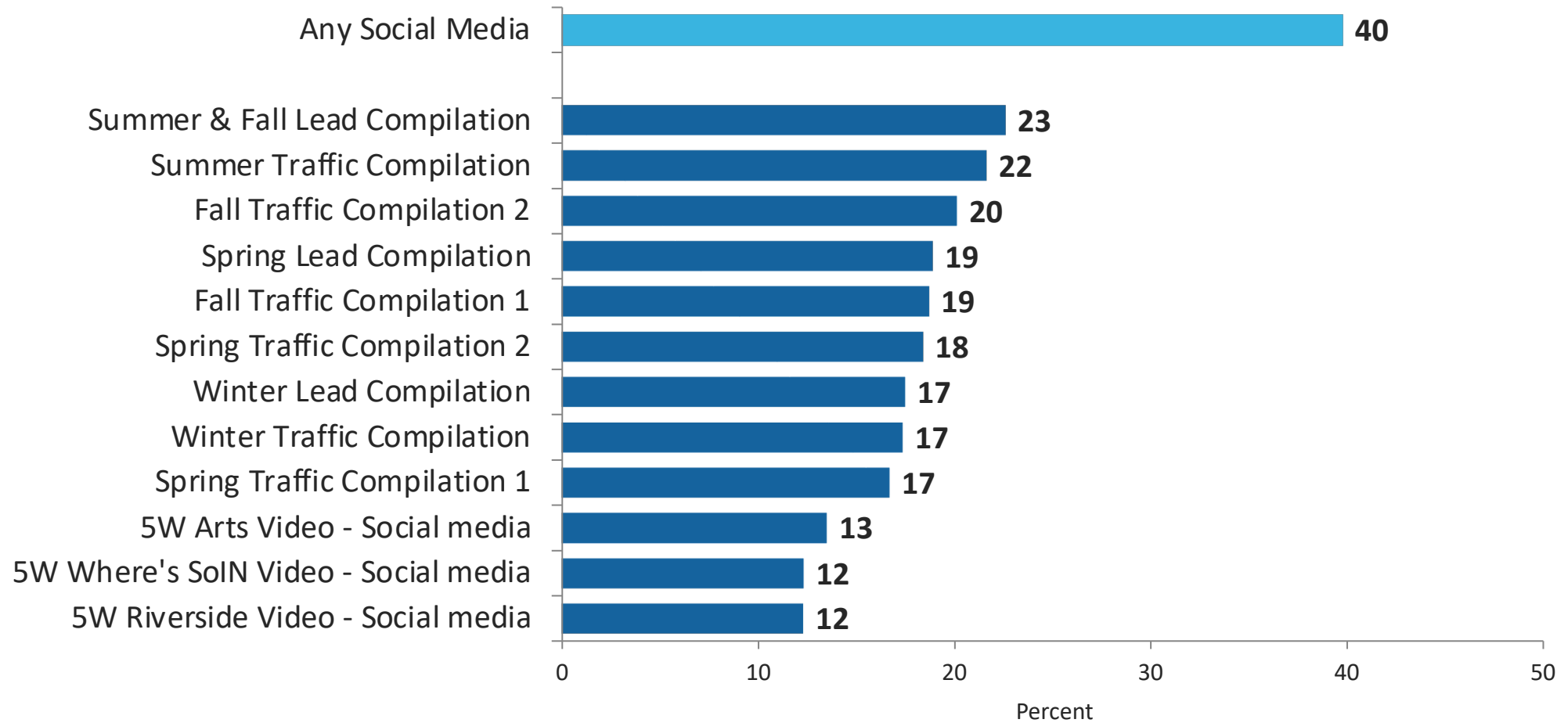
Social Media Creative (Cont'd)



Winter Lead Compilation

Awareness of Individual Ads* - Social Media

Base: Residents of Southern Indiana's Regional Advertising Markets



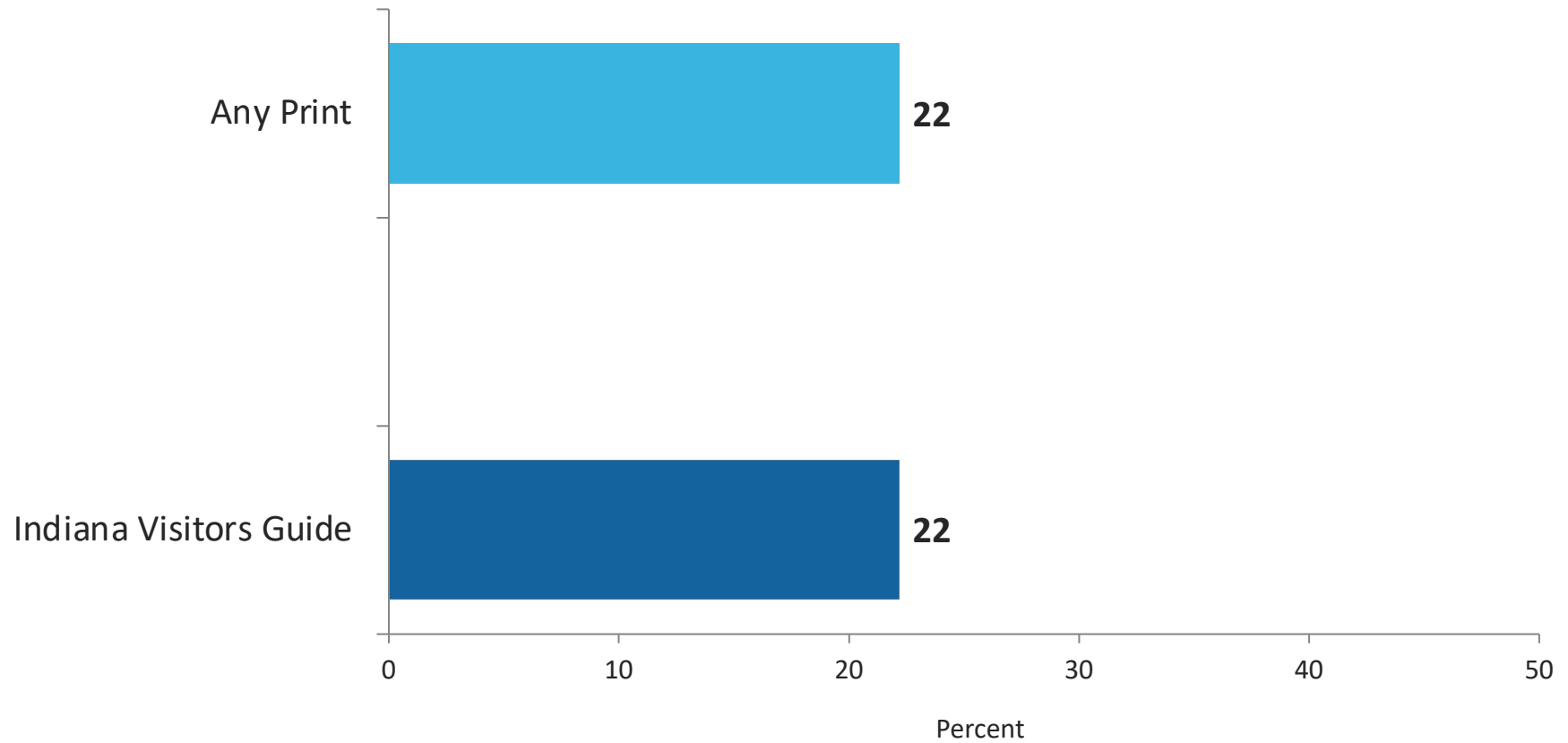
Print Creative



Indiana Visitors Guide

Awareness of Individual Ads* - Print

Base: Residents of Southern Indiana's Regional Advertising Markets





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



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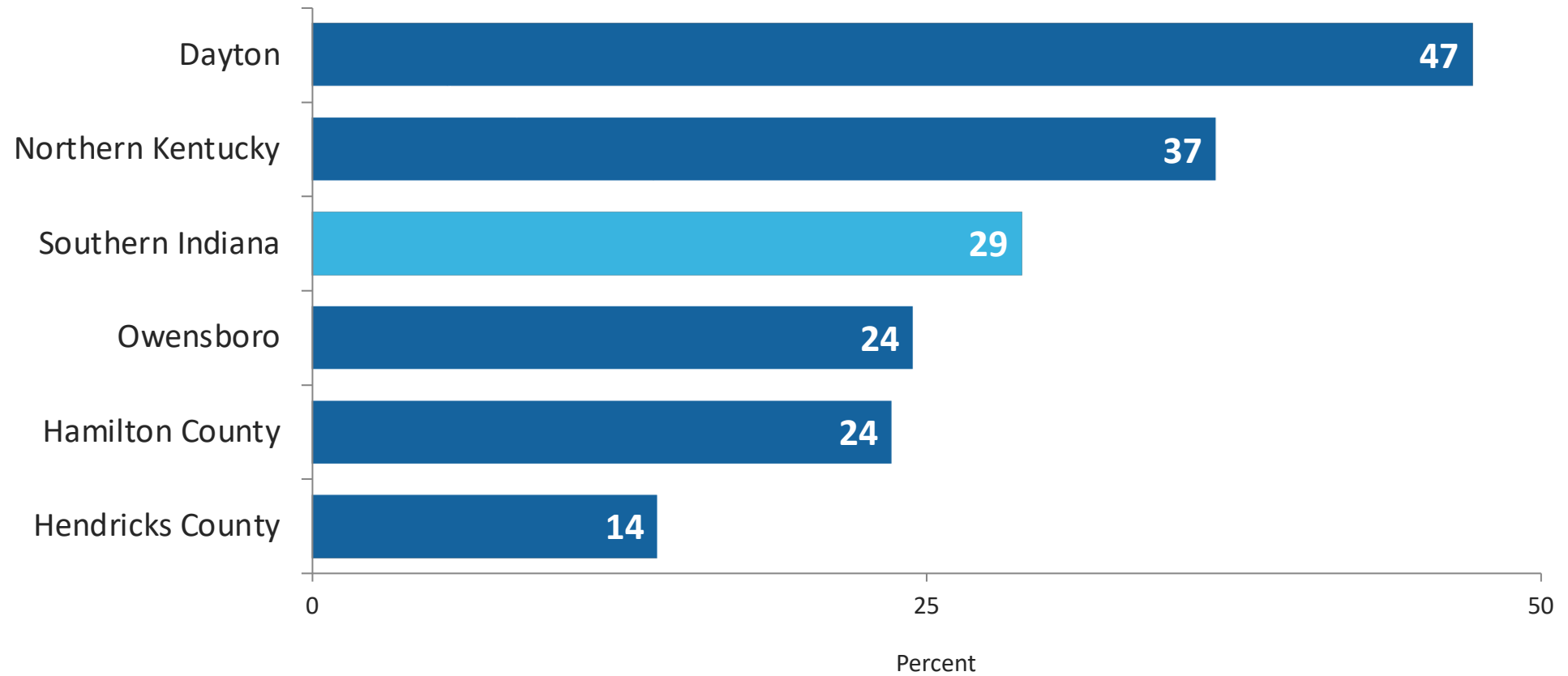
**Destination
Visitation
& Interest**

Destination Visitation & Intent

- Three in ten (29%) travelers within SoIN's key advertising markets have visited Southern Indiana during their lifetimes. Almost half (47%) have visited Dayton and almost four in ten (37%) have visited Northern Kentucky.
- Less than two in ten (15%) have visited Southern Indiana during the past 2 years, while over a quarter (28%) have visited Dayton and two in ten (20%) Northern Kentucky.
- A third (32%) intend to visit Southern Indiana during the next 12 months, a virtual tie with Dayton (34%) and Owensboro (34%). Four in ten (41%) intend to visit Northern Kentucky.

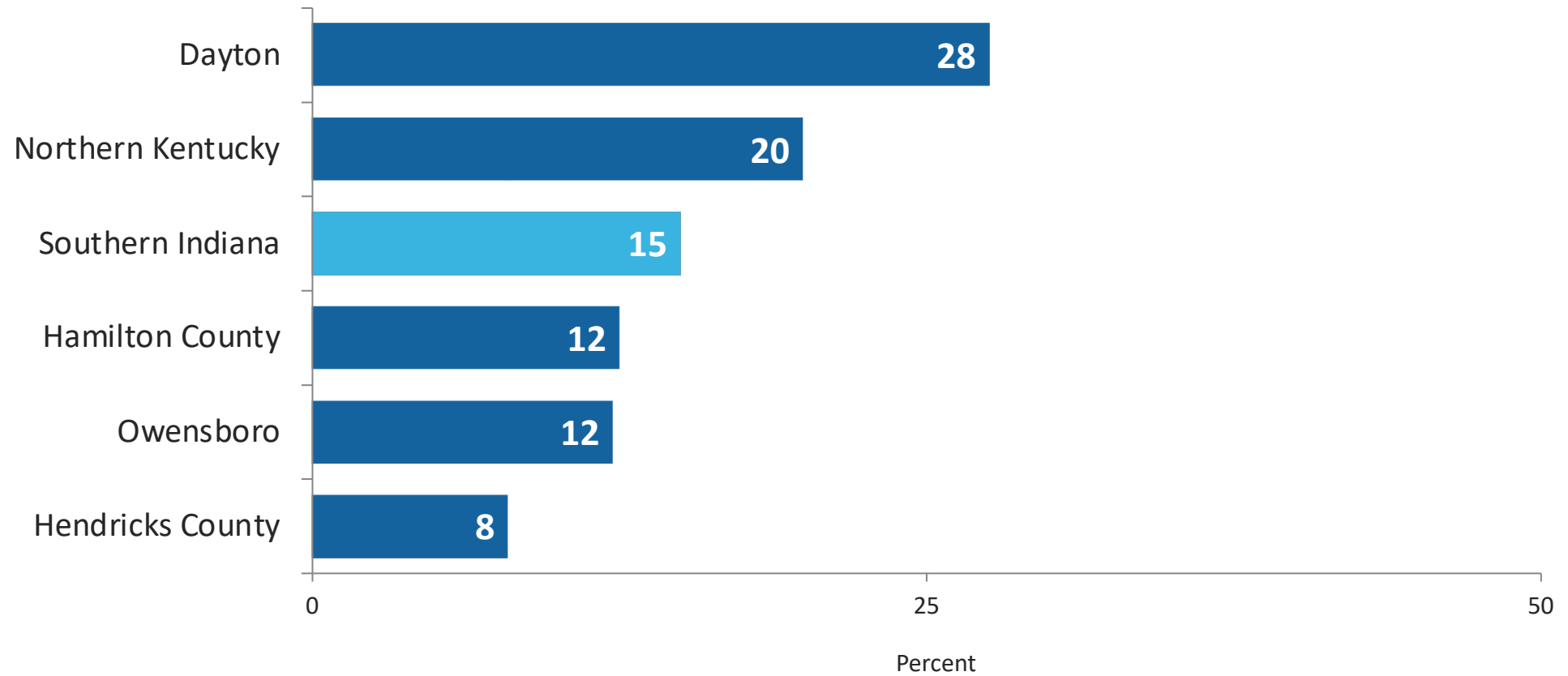
Destinations Ever Visited

Base: Residents of Southern Indiana's Regional Advertising Markets



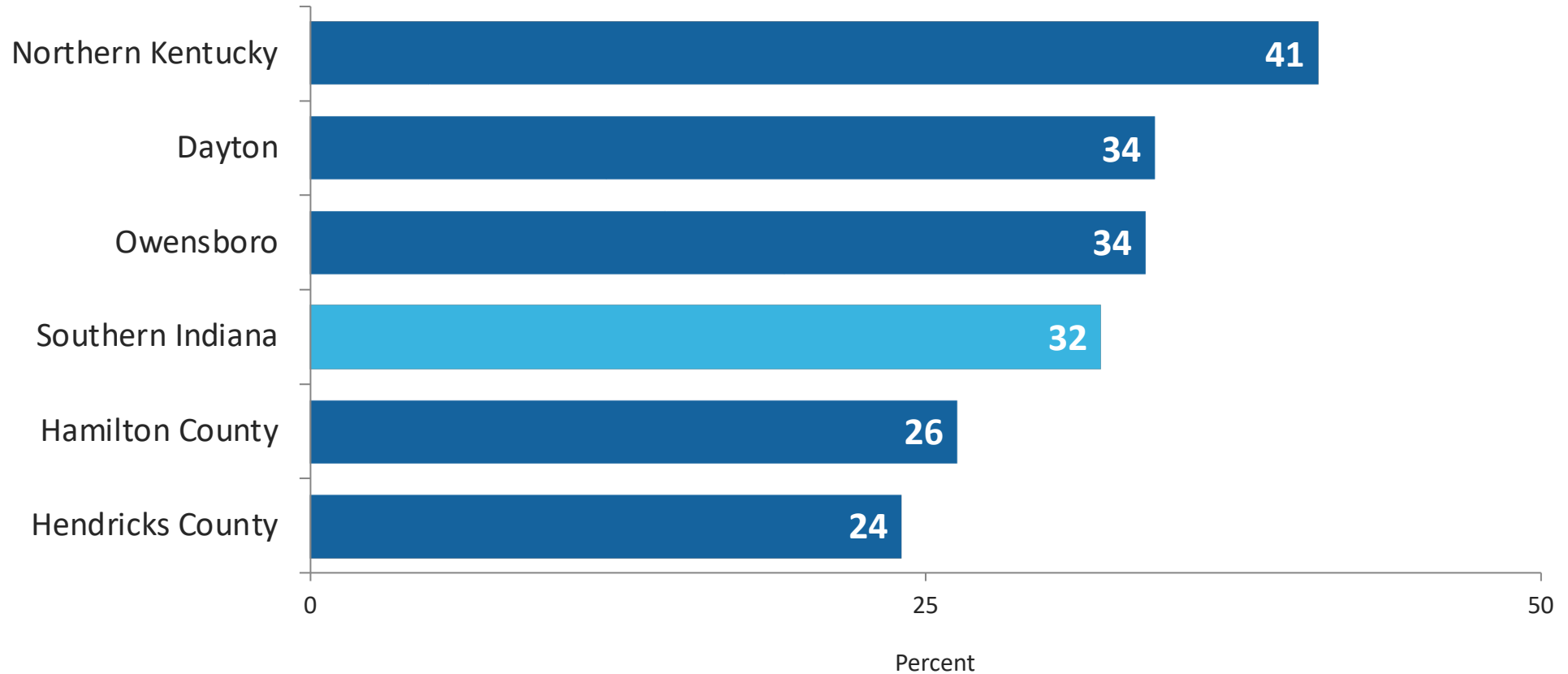
Destinations Visited in Past 2 Years

Base: Residents of Southern Indiana's Regional Advertising Markets



Destinations Intend to Visit in Next 12 Months

Base: Residents of Southern Indiana's Regional Advertising Markets





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Destination Hot Buttons

Travel Motivators

- Respondents evaluated the image of Southern Indiana and five other destinations on an overall basis and on a series of additional detailed image attributes.
- To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:
 - For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.
- Then, in order to better communicate the results, the data were grouped into broader categories or factors.
- Among travelers in Southern Indiana’s target markets, for a destination to get on travelers’ consideration list, it must, first and foremost, be perceived to:
 - Be suitable for **adults and couples** – which is logical, since they are paying for the vacation.
 - Be **exciting** – being seen as a fun and exciting place, where they’d have a real adventure.
 - A great **family atmosphere** – a good place for families to visit, that children would really enjoy.

Travel Motivators (Cont'd)

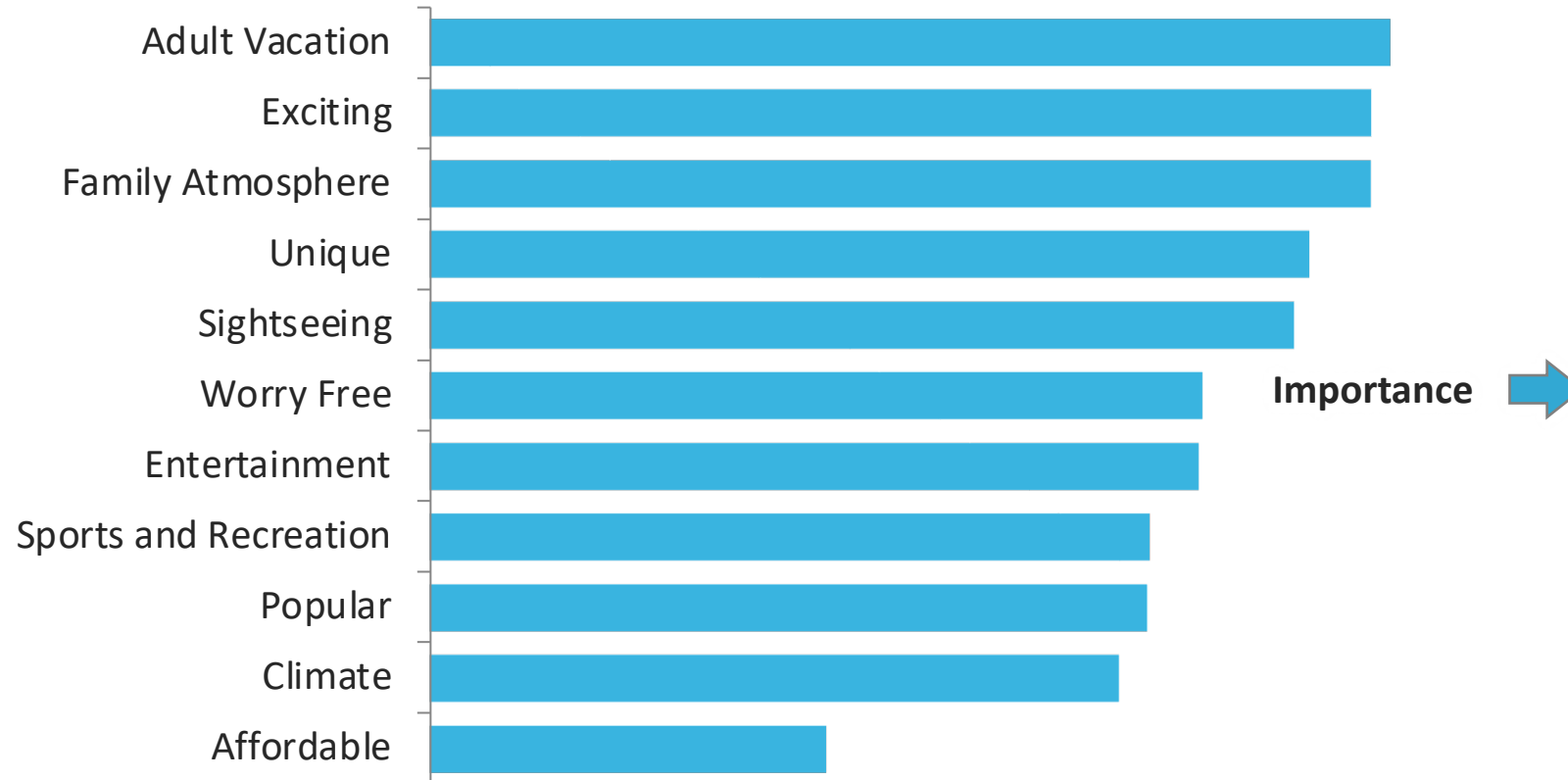
- There are several factors that individually are of moderate importance, but that in combination define the excitement, suitability for adults, and family atmosphere that attracts vacationers to a destination:
 - **Uniqueness**, including the overall vacation experience and local food.
 - Great **sightseeing**, including lots to see and do, beautiful scenery, well-known landmarks, interesting architecture, etc.
 - A safe, welcoming and **worry-free** environment.
 - The opportunities for **entertainment**, e.g., shopping, theater, nightlife, and festivals.
- Lower priorities are:
 - **Sports and recreation**, defined here as excellent state parks and being good for viewing wildlife and nature.
 - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising or favorable reviews?
 - **Climate**.

Travel Motivators (Cont'd)

- **Affordability** is relatively unimportant at the wish list stage:
 - But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
 - Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.
- The Hot Buttons are the ten individual image attributes tied to destination selection for Southern Indiana and its competitive set. Focusing on the Hot Buttons that best align with SoIN's marketing strategies will help convert interest to visitation. The ten Hot Buttons emerging from this study are: good for an adult vacation; a fun place for a vacation; lots of things to see and do; provides a unique vacation experience; a good place for families to visit; an exciting place; children would especially enjoy this place; good for couples; popular with vacationers; and well-known landmarks.

Travel Motivators

Base: Residents of Southern Indiana's Regional Advertising Markets



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

Top 10 Hot Buttons

Base: Residents of Southern Indiana's Regional Advertising Markets

Hot Buttons

Good for an adult vacation

A fun place for a vacation

Lots of things to see and do

Provides a unique vacation experience

A good place for families to visit

An exciting place

Children would especially enjoy this place

Good for couples

Popular with vacationers

Well-known landmarks



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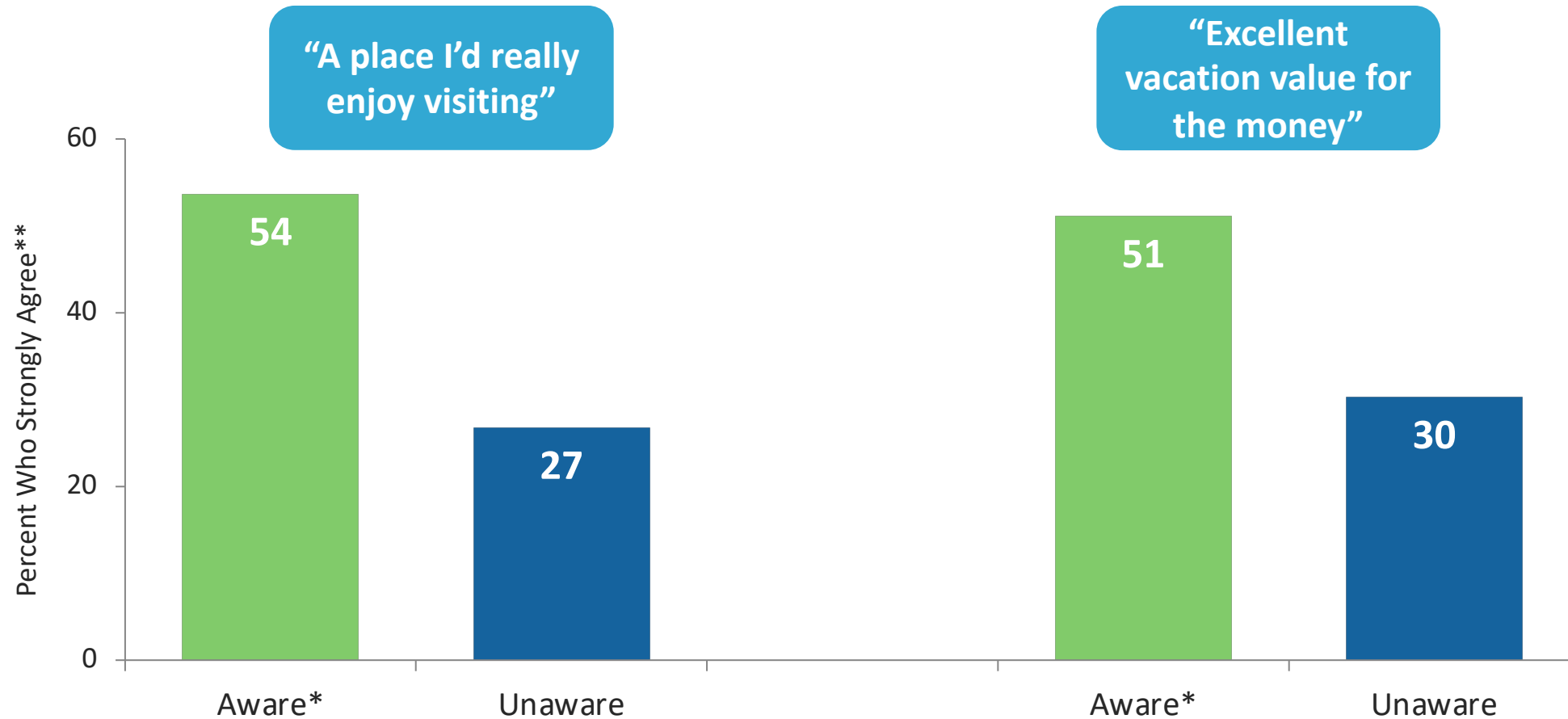
Advertising Impact on Southern Indiana's Image

Advertising Impacts

- The SoIN campaign had a very positive impact on travelers' perceptions of Southern Indiana:
 - People exposed to the campaign gave Southern Indiana significantly higher rating scores than those unfamiliar with the campaign for the general overall statement "Southern Indiana is a place I would really enjoy visiting" and the notion that a vacation in Southern Indiana provides "excellent value for the money."
 - Looking at the Hot Buttons, we find that the campaign did an excellent job of improving people's perceptions of Southern Indiana for all ten.
- The advertising had greatest impact on perceptions related to:
 - Children would especially enjoy this place
 - Well-known destination
 - Great for craft cocktails
 - Provides a unique vacation experience
 - An exciting place
- There are no variables where significantly more travelers unaware of the advertising rated Southern Indiana higher than those who were aware of SoIN's campaign.

Advertising Impact on Southern Indiana's Overall Image

Base: Residents of Southern Indiana's Regional Advertising Markets



*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 Southern Indiana's Image

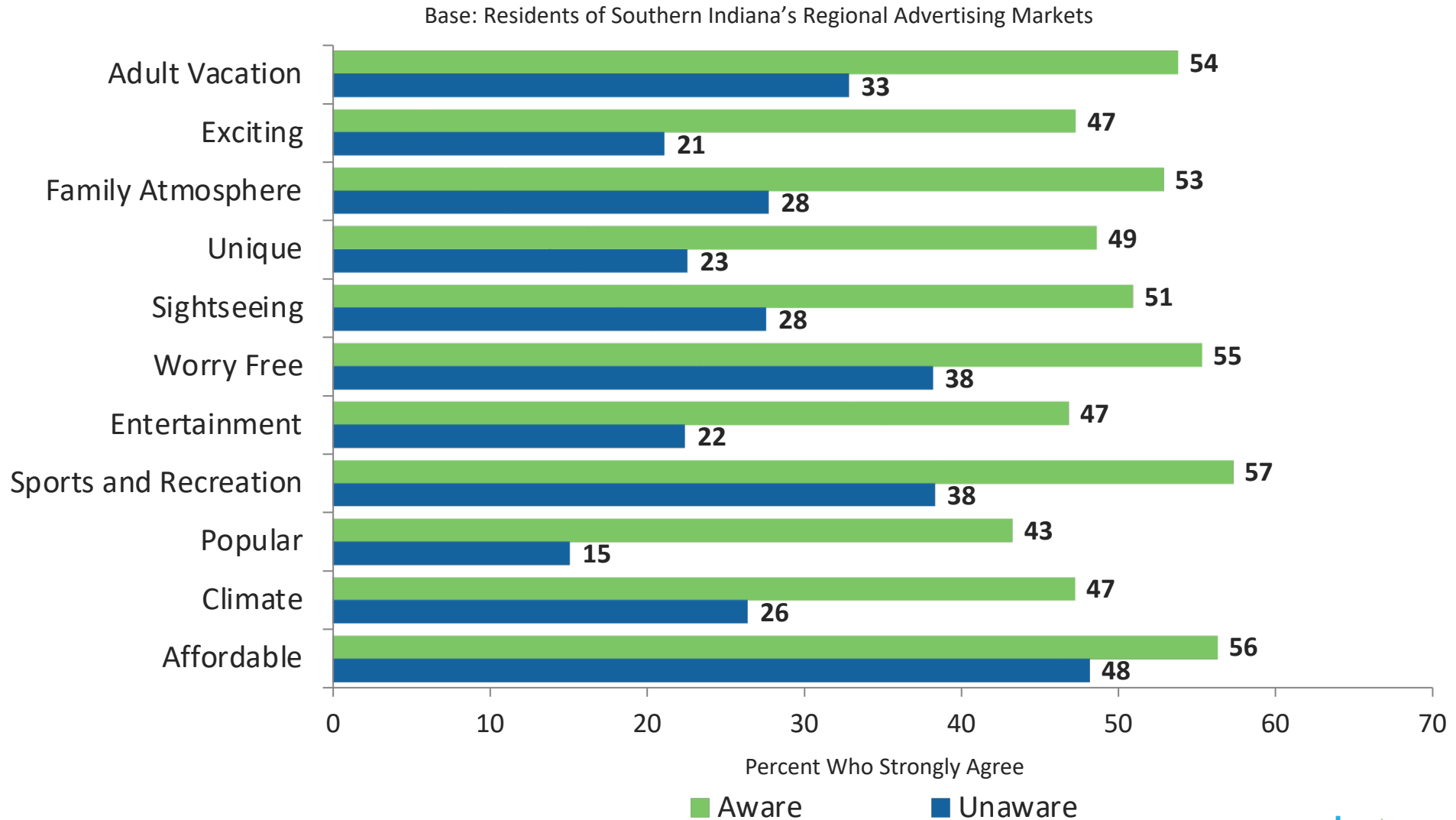


Image Attributes Most Impacted by Advertising

Base: Residents of Southern Indiana's Regional Advertising Markets



Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Southern Indiana's Regional Advertising Markets

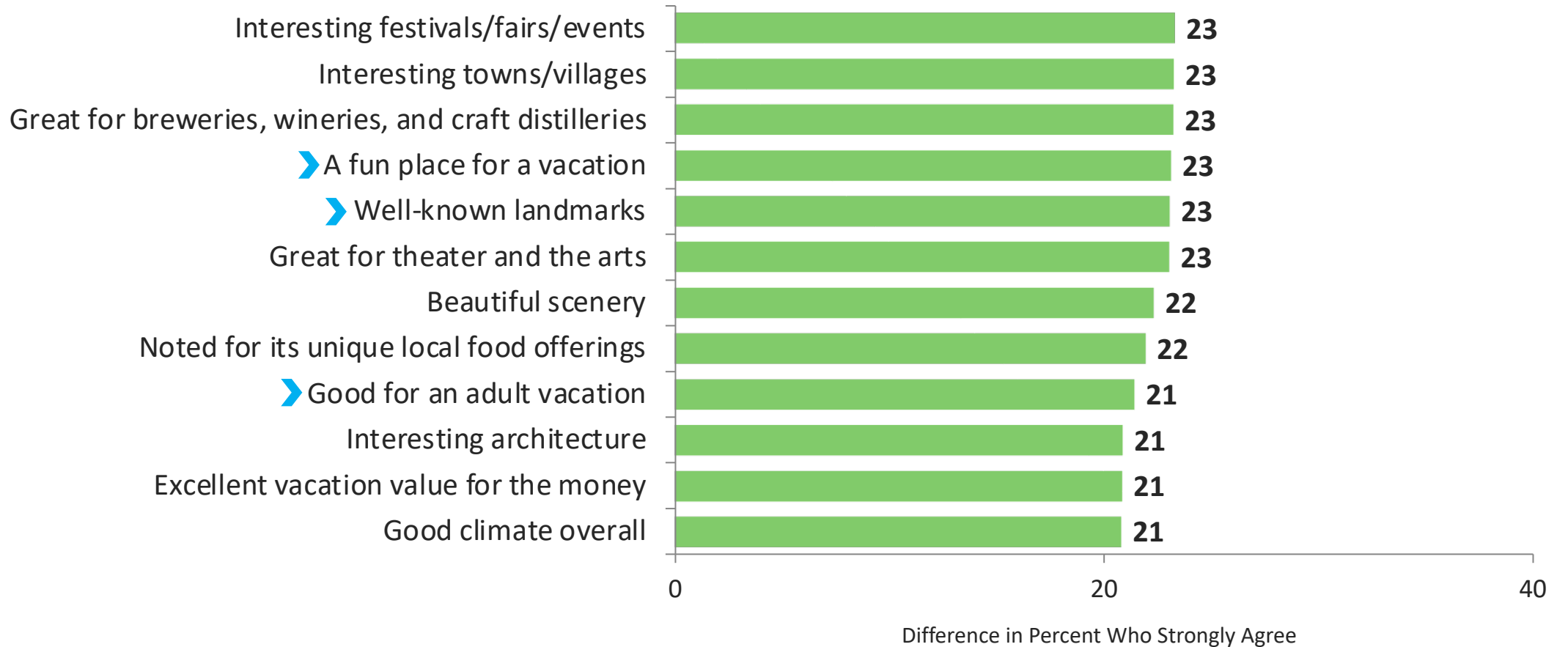
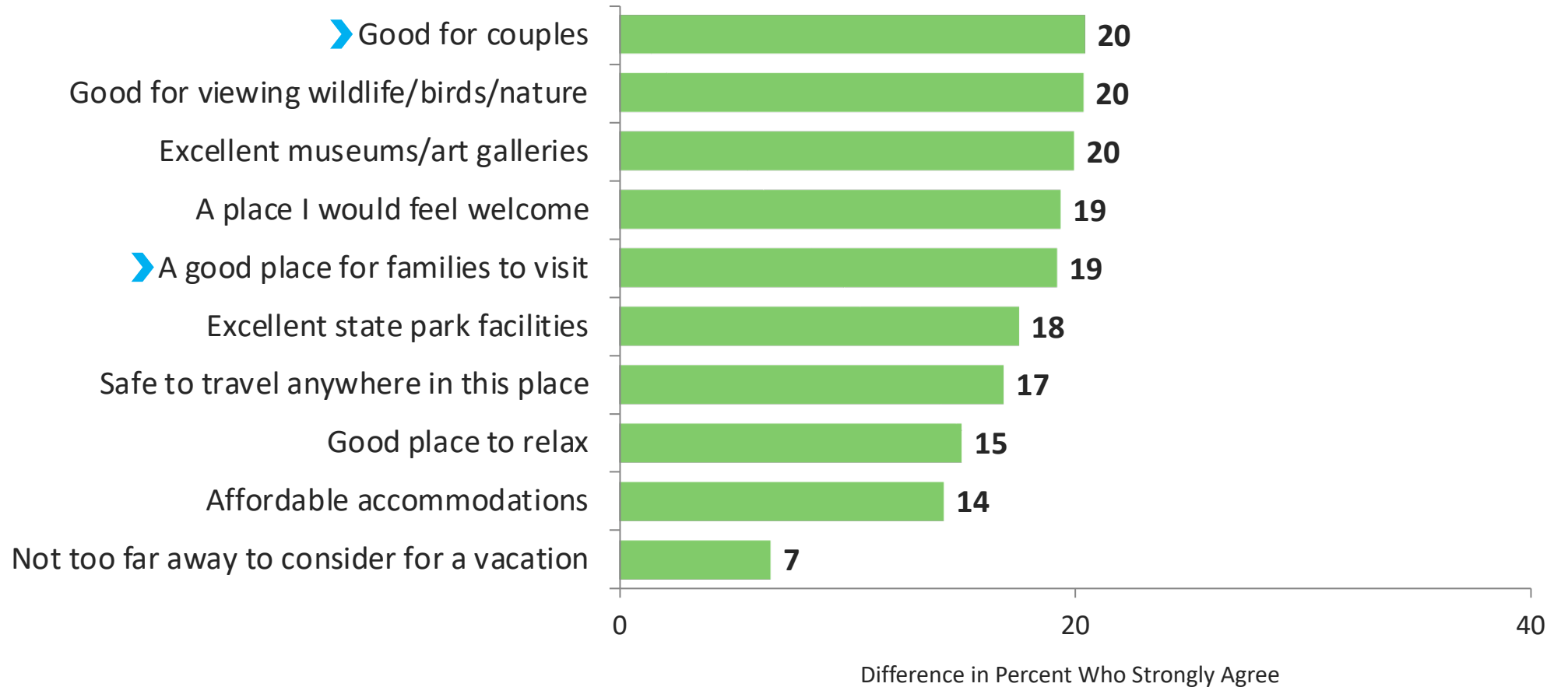


Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Southern Indiana's Regional Advertising Markets





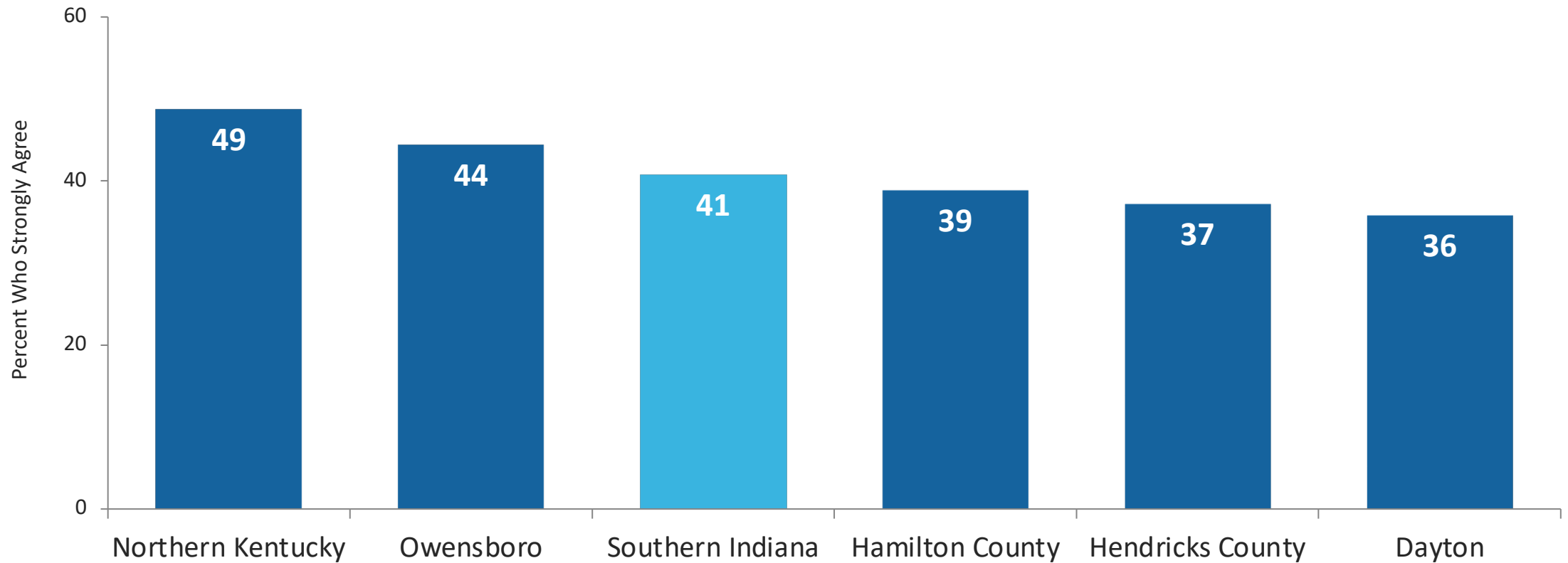
Southern Indiana's Image vs. the Competition

Southern Indiana's Image

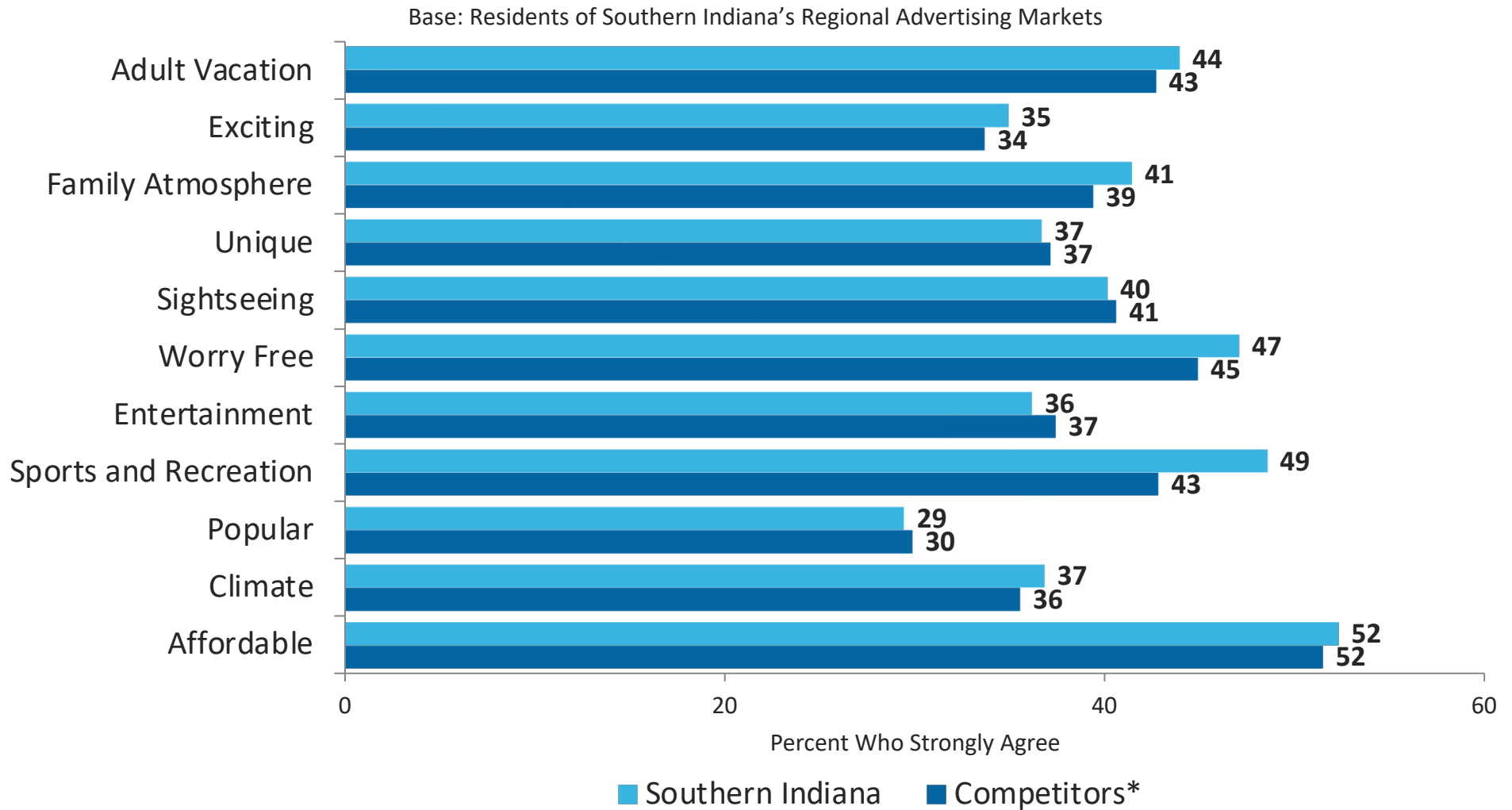
- Relative to the other destinations in the competitive set for this study, Southern Indiana has a positive overall image among travelers. Across the markets surveyed, four in ten (41%) rated Southern Indiana very favorably as a destination they “would really enjoy visiting.”
 - Virtually tied with Hamilton County
 - Behind Northern Kentucky and Owensboro
 - Ahead of Hendricks County and Dayton
- Looking at the travel motivators overall, Southern Indiana is evenly matched with its competition, with Northern Kentucky as the most competitive destination to Southern Indiana.
- When comparing Southern Indiana's image versus the image of the combined competition, Southern Indiana's one image strength is good for viewing wildlife/birds/nature.
- Southern Indiana had no significant perceived image weaknesses versus the competitive set.

Southern Indiana's Overall Image vs. Competition — “A Place I'd Really Enjoy Visiting”

Base: Residents of Southern Indiana's Regional Advertising Markets



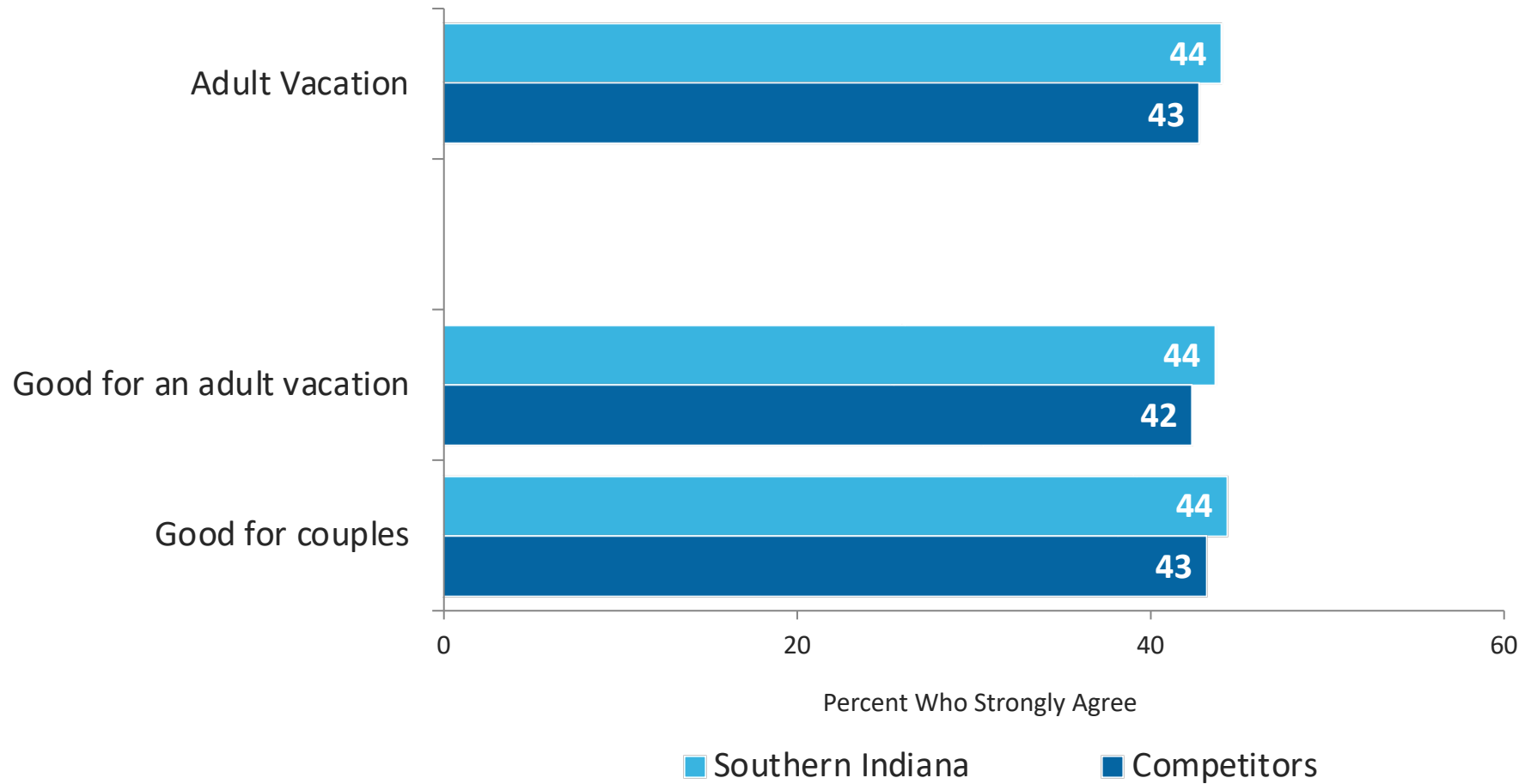
Southern Indiana's Overall Image vs. Competition



* Includes Hendricks County, Indiana; Hamilton County, Indiana; Northern Kentucky (Boone, Campbell, and Kenton counties); Dayton, Ohio; Owensboro, Kentucky

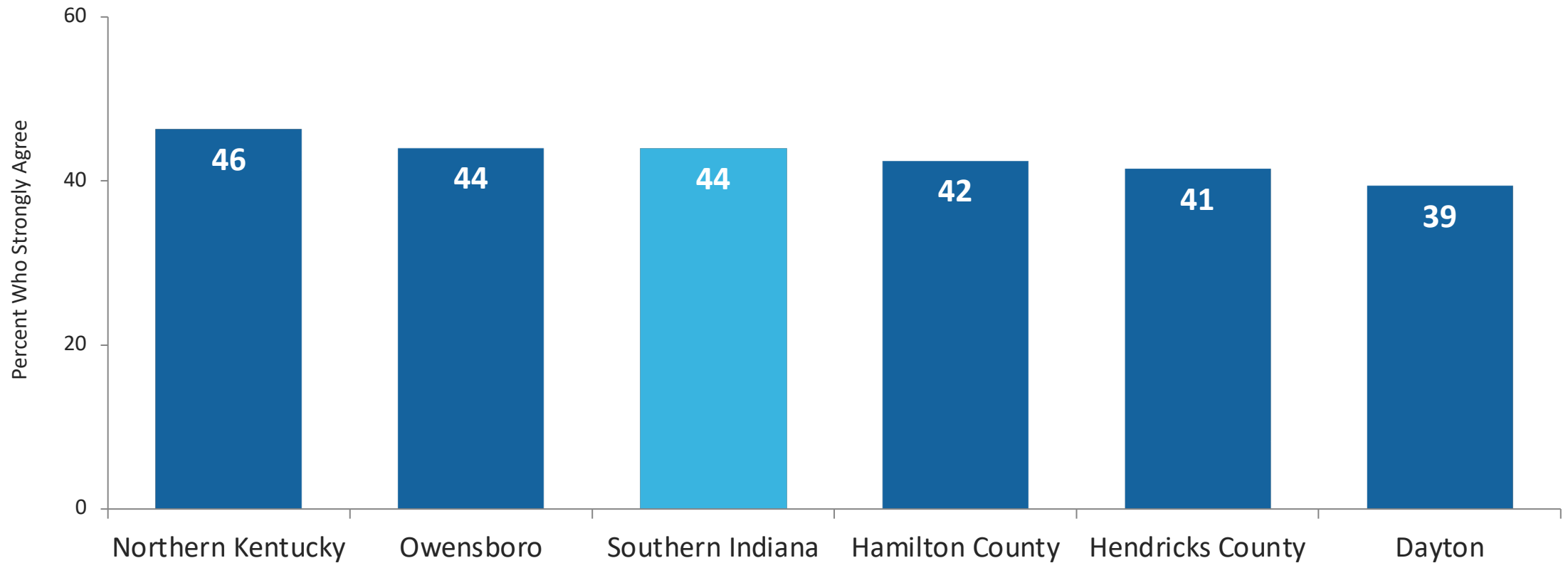
Southern Indiana's Image vs. Competition — Adult Vacation

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition — Adult Vacation

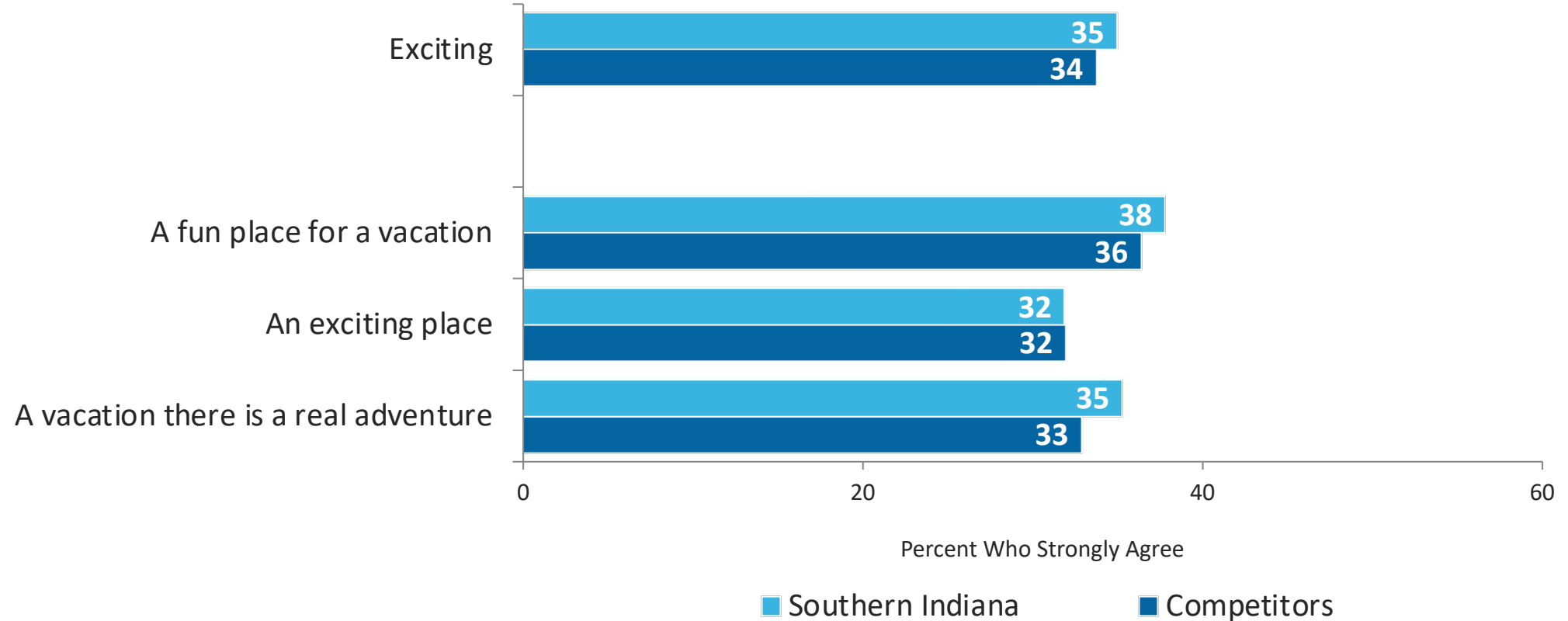
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

— Exciting

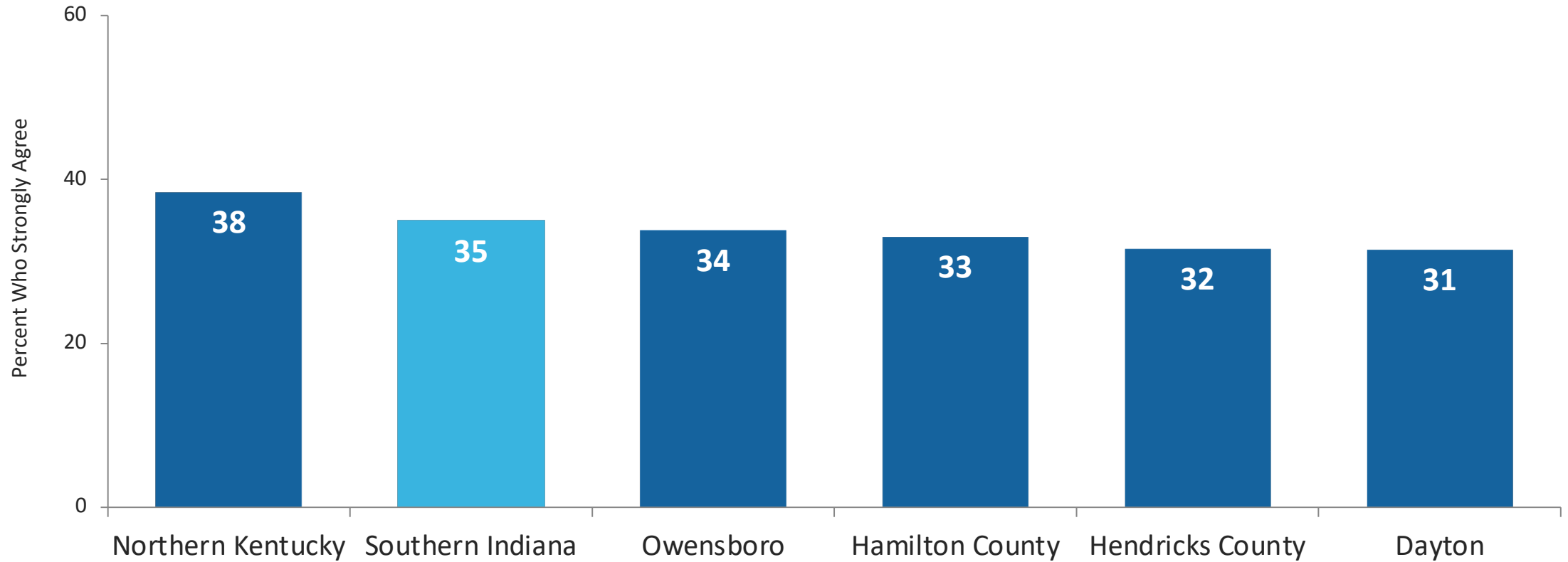
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

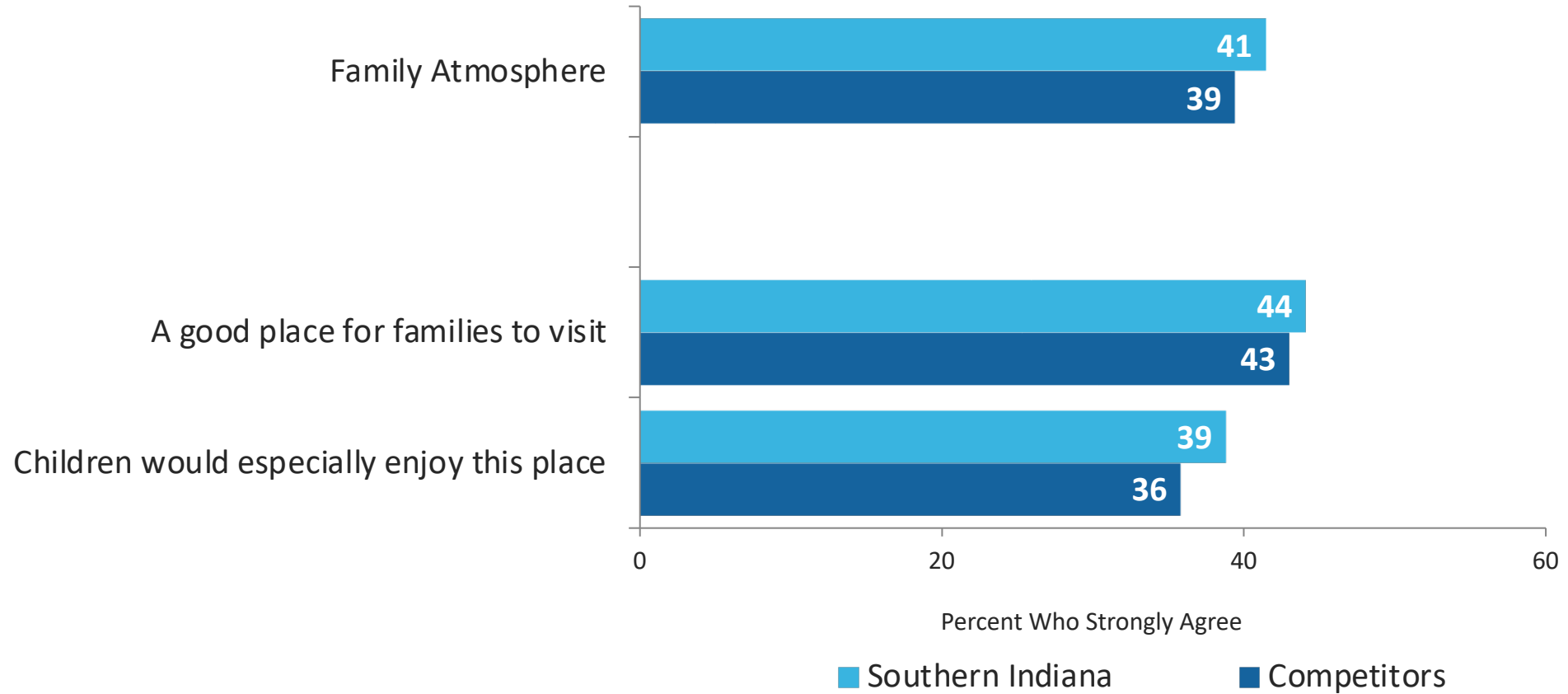
— Exciting

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition — Family Atmosphere

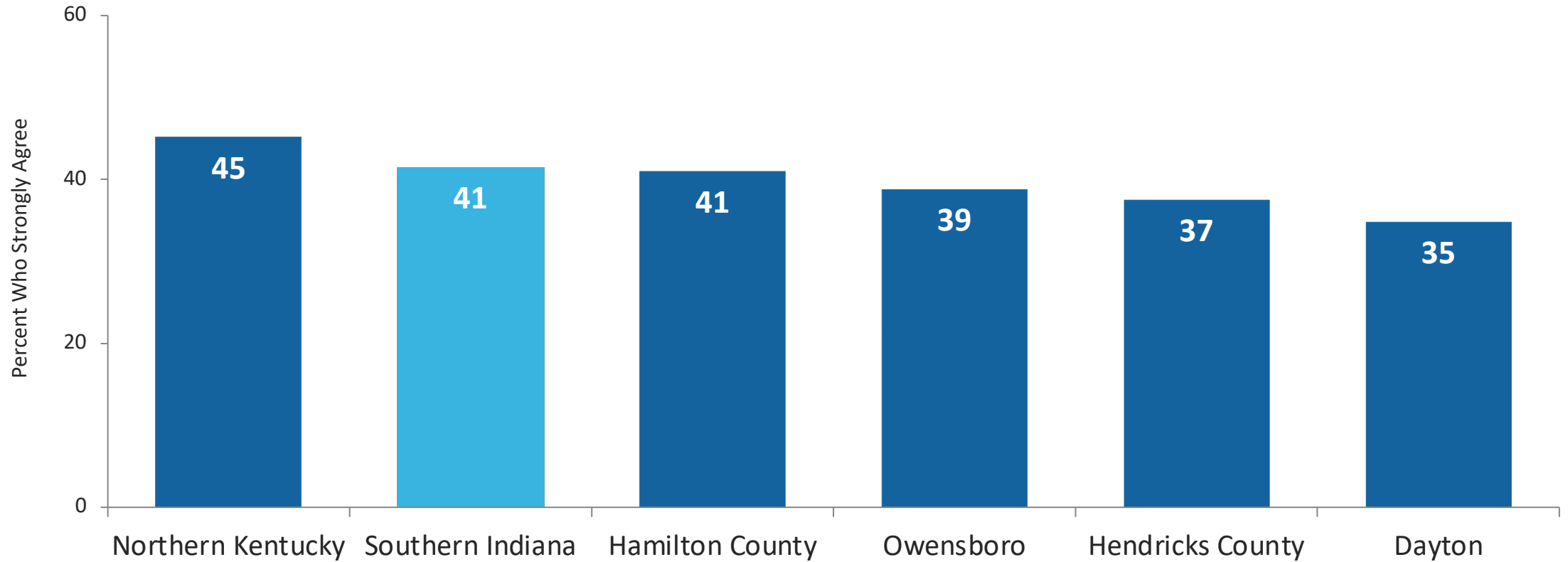
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

— Family Atmosphere

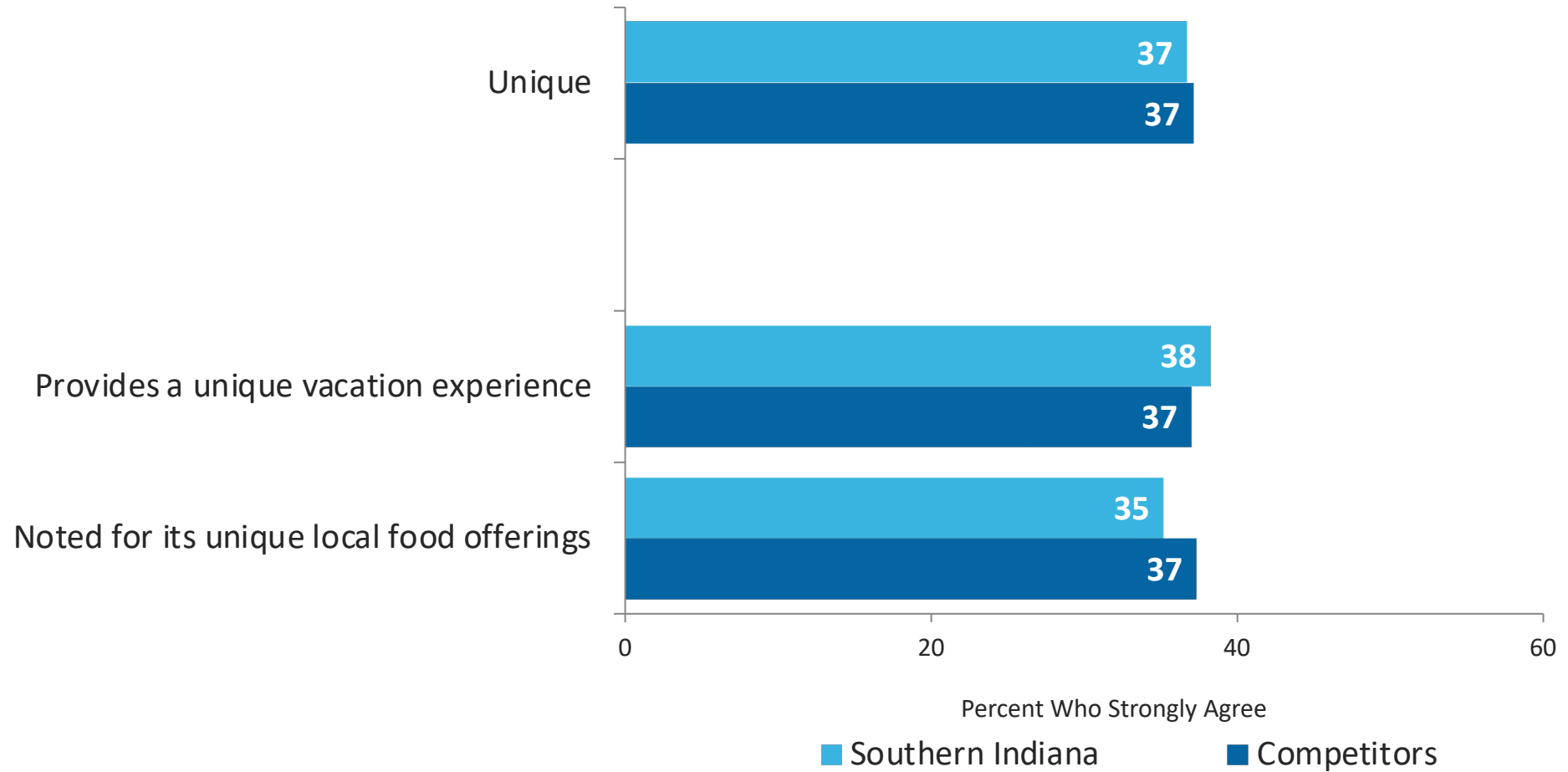
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

— Unique

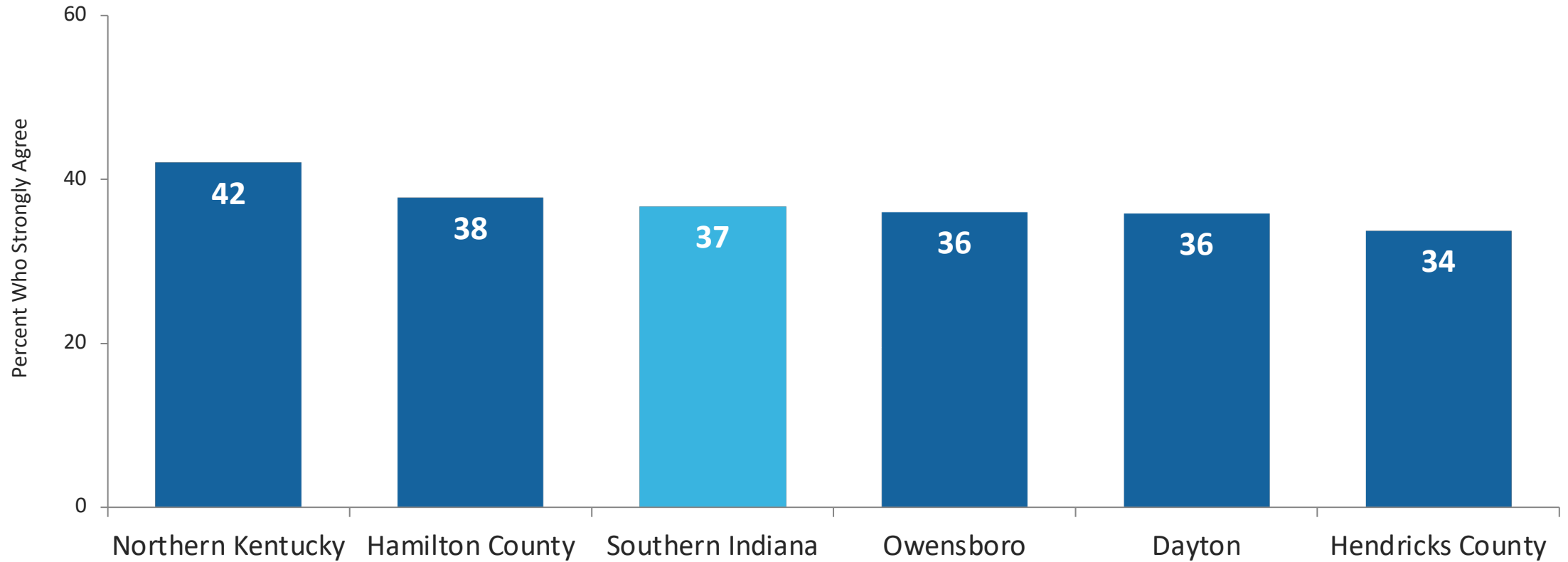
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

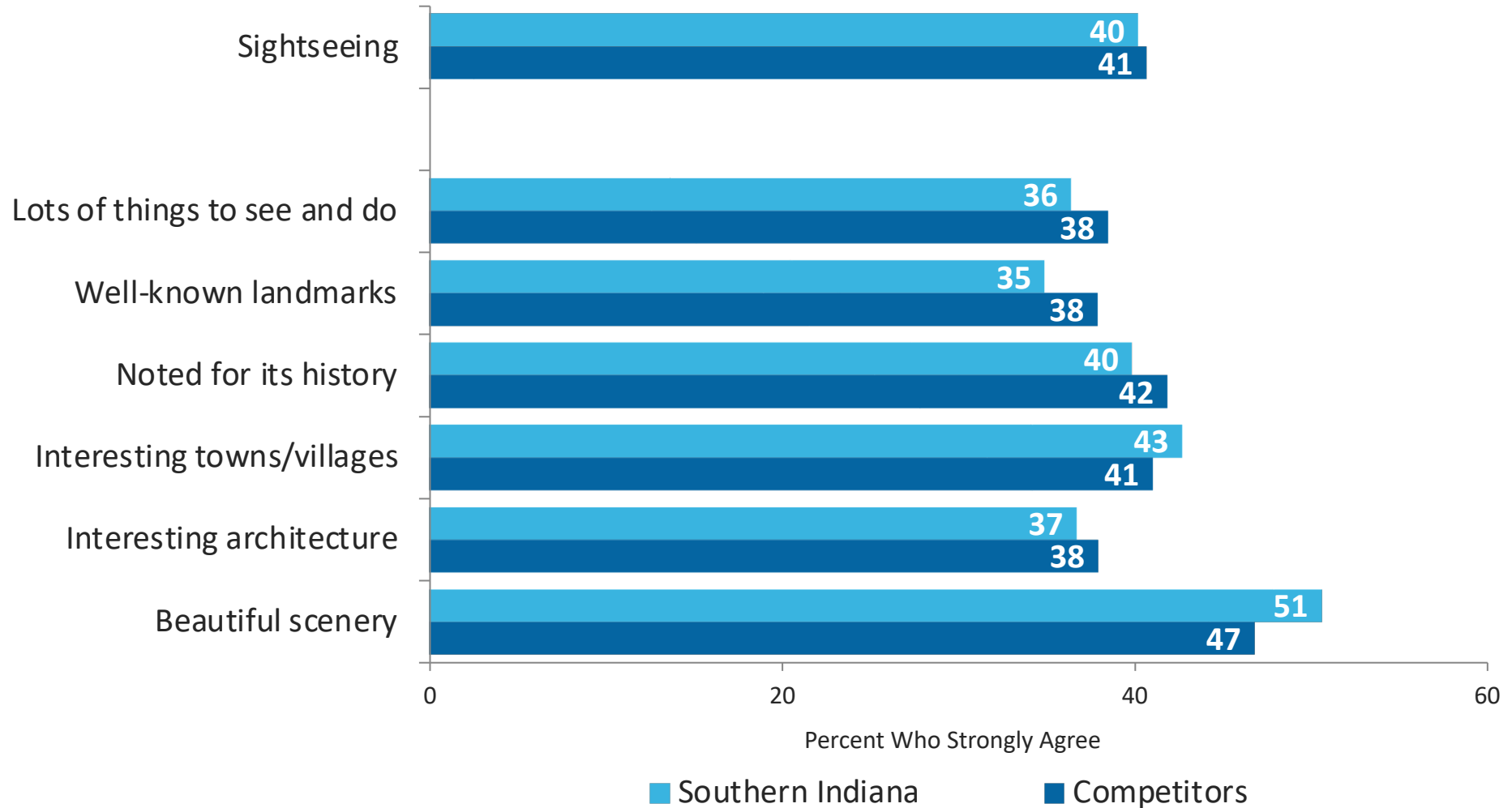
— Unique

Base: Residents of Southern Indiana's Regional Advertising Markets



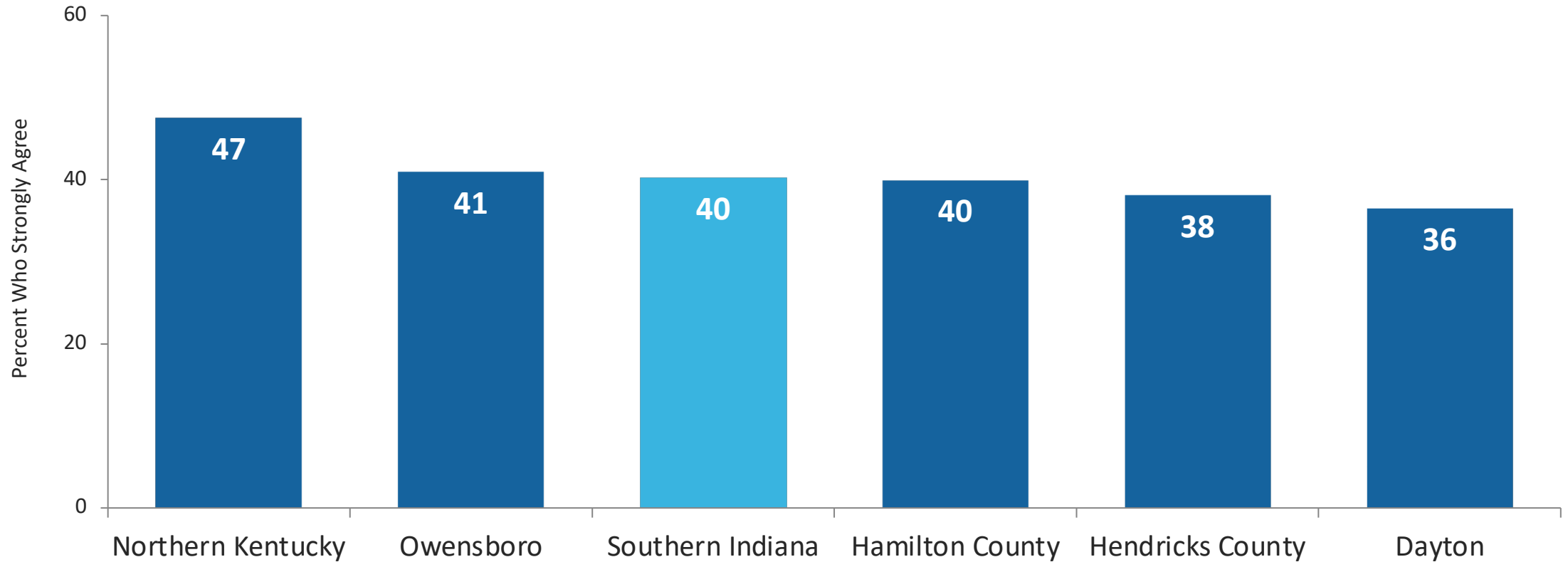
Southern Indiana's Image vs. Competition — Sightseeing

Base: Residents of Southern Indiana's Regional Advertising Markets



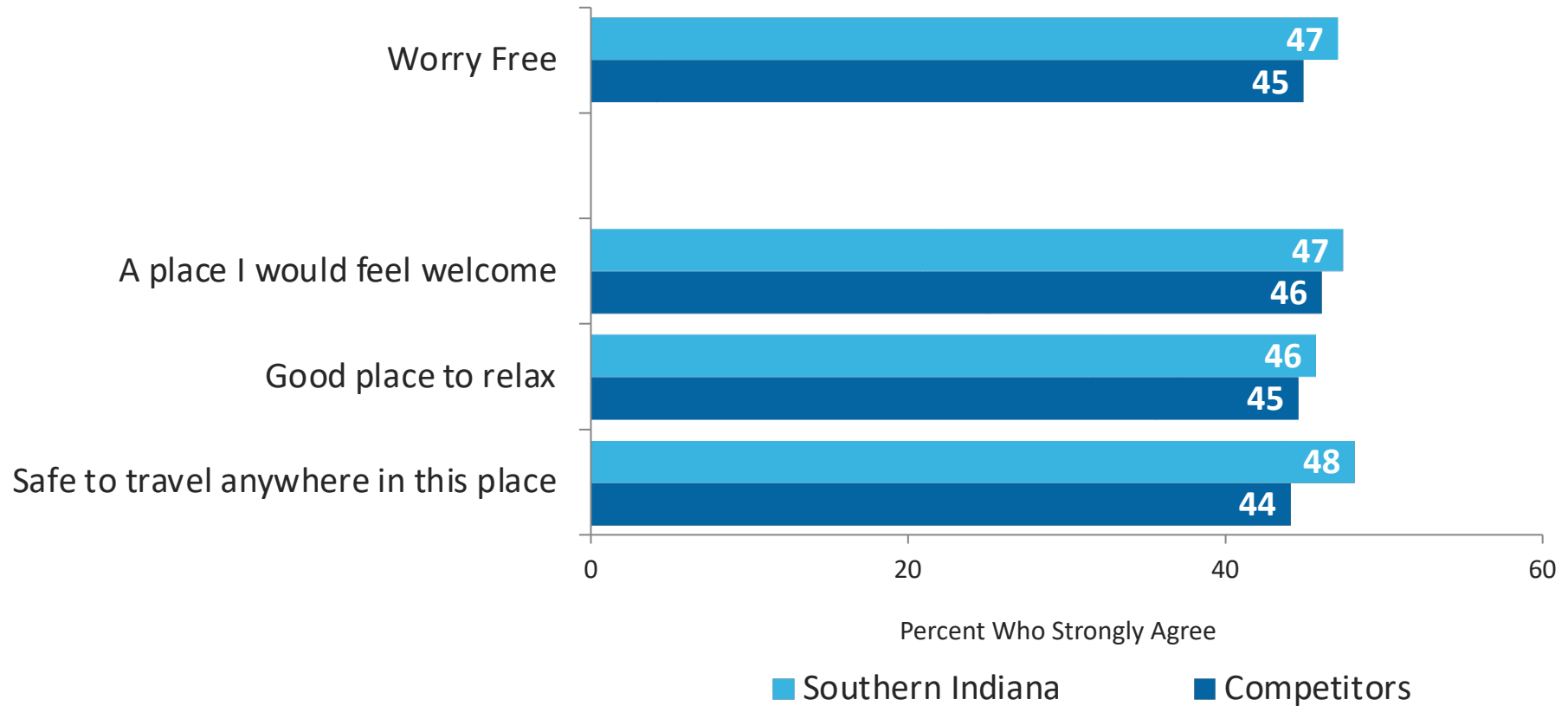
Southern Indiana's Image vs. Competition — Sightseeing

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition — Worry Free

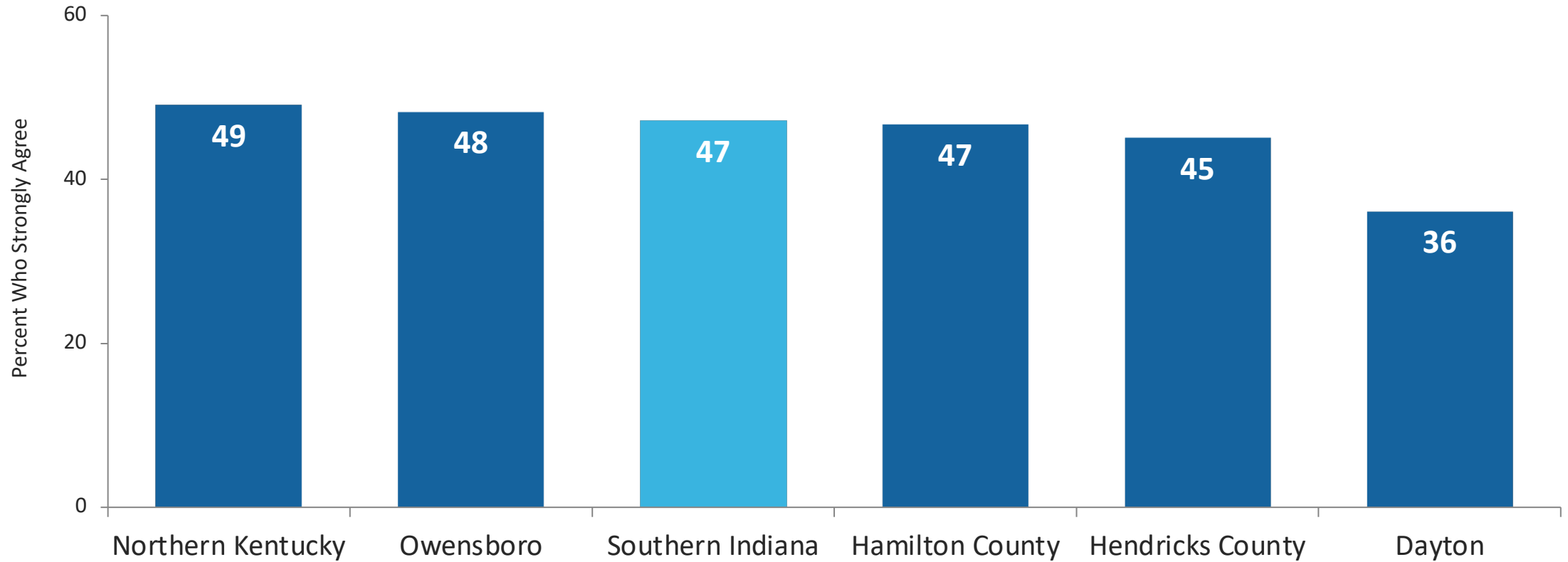
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

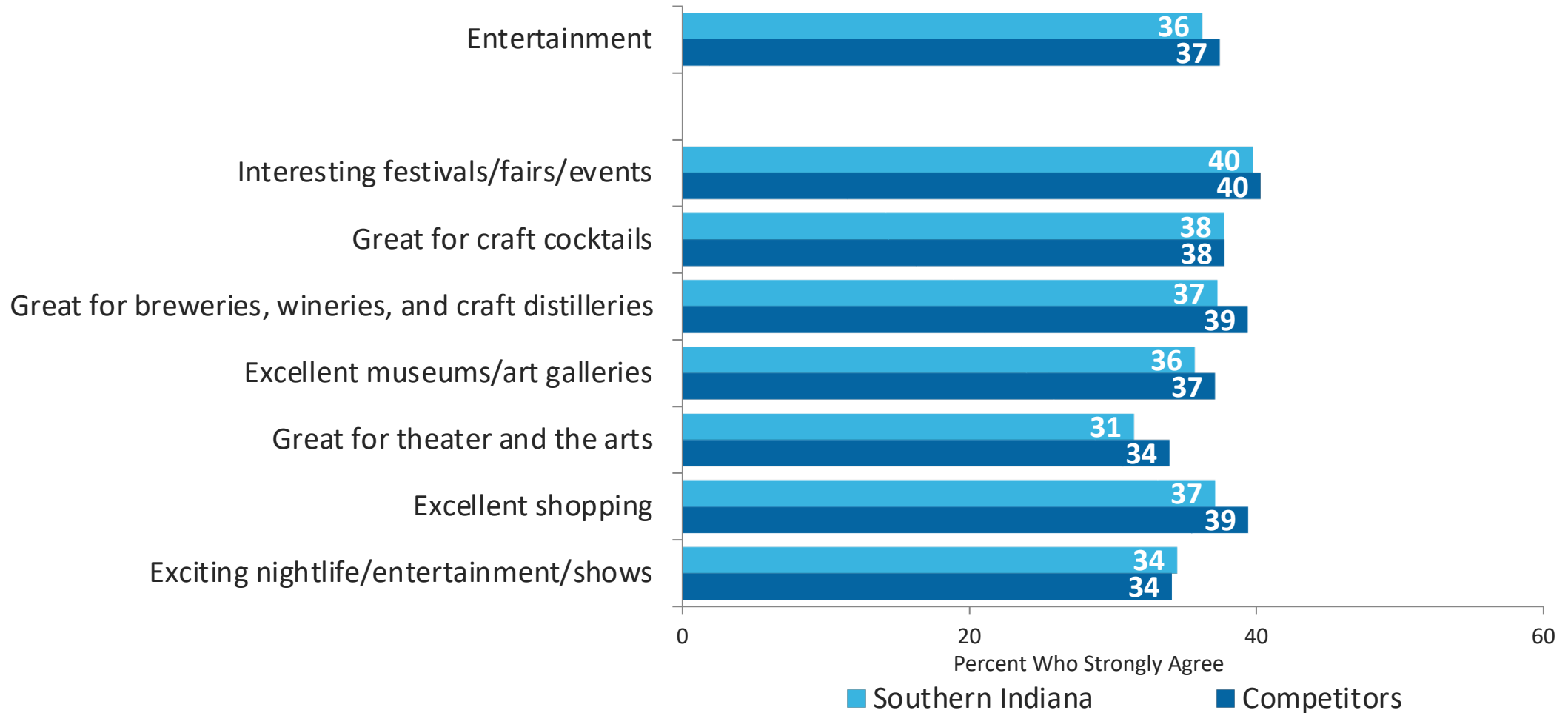
— Worry Free

Base: Residents of Southern Indiana's Regional Advertising Markets



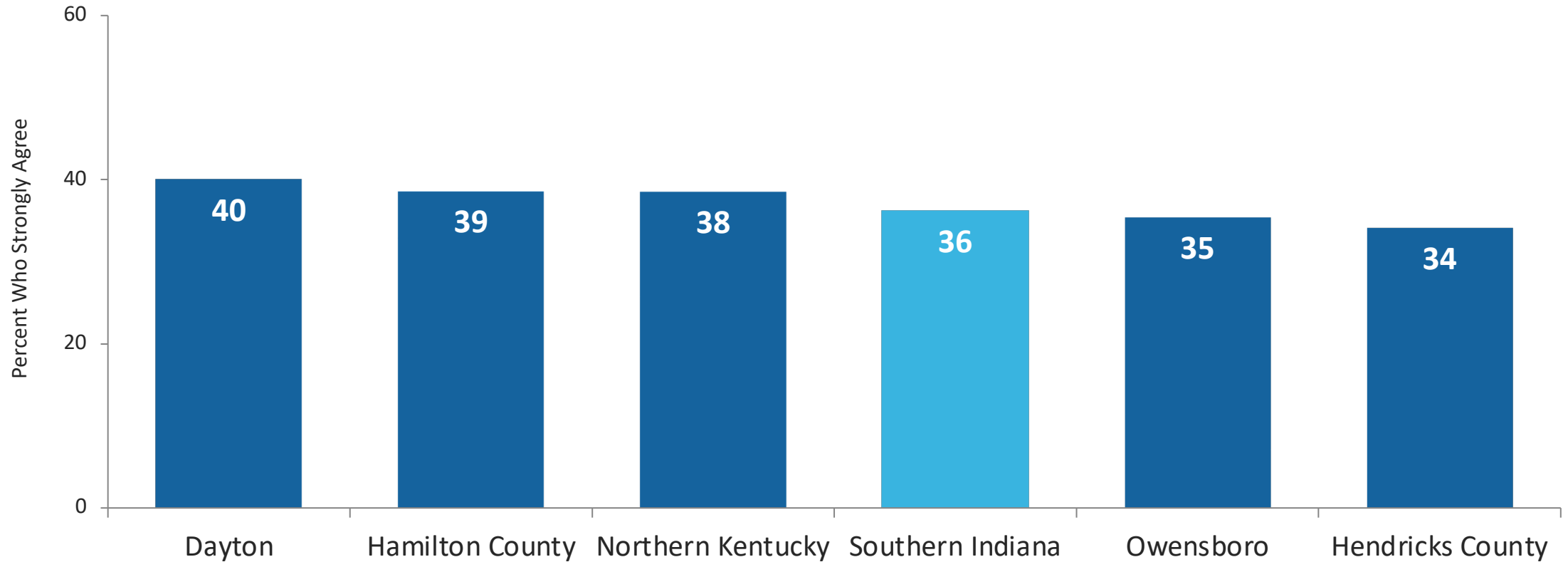
Southern Indiana's Image vs. Competition — Entertainment

Base: Residents of Southern Indiana's Regional Advertising Markets



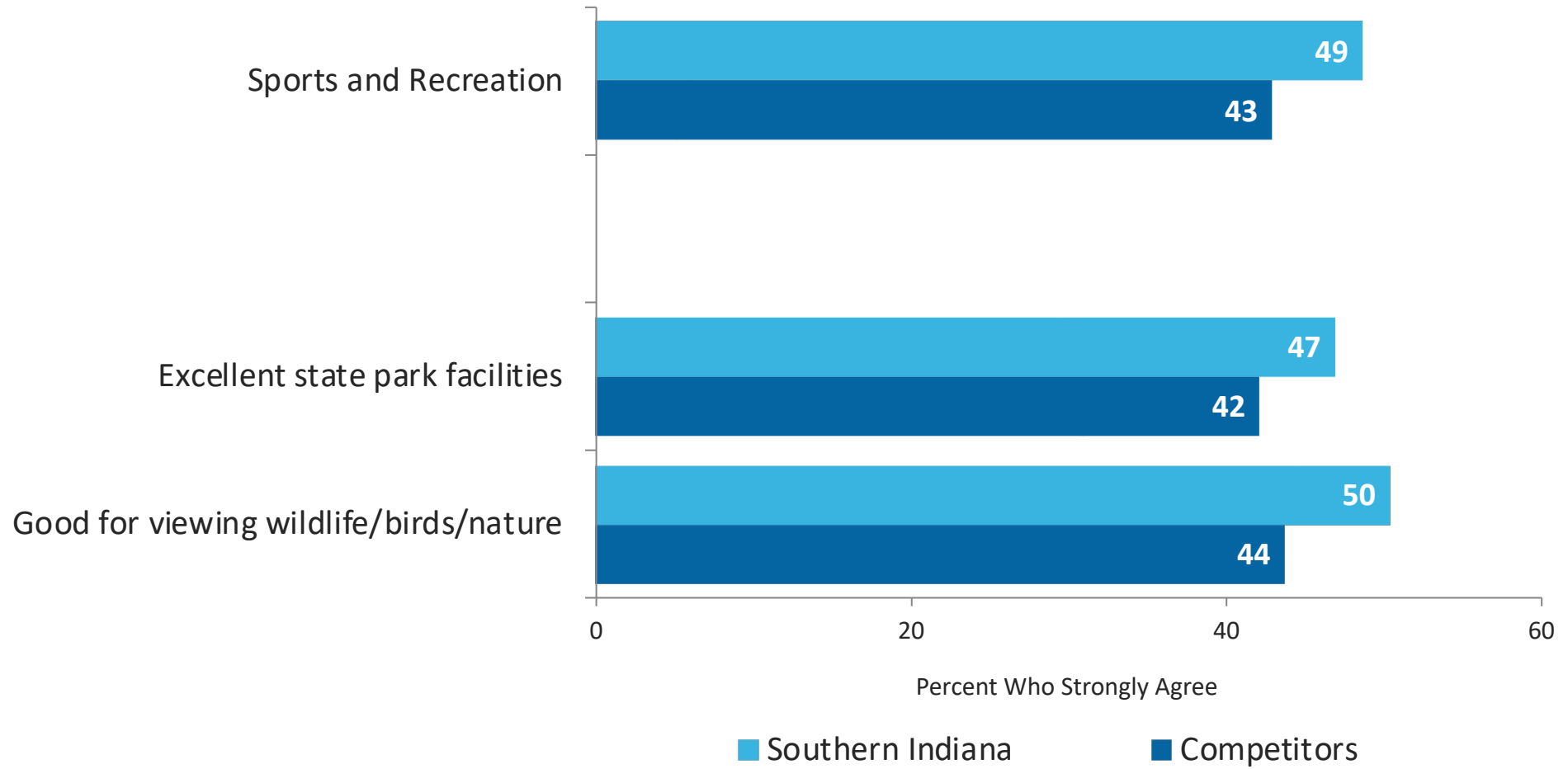
Southern Indiana's Image vs. Competition — Entertainment

Base: Residents of Southern Indiana's Regional Advertising Markets



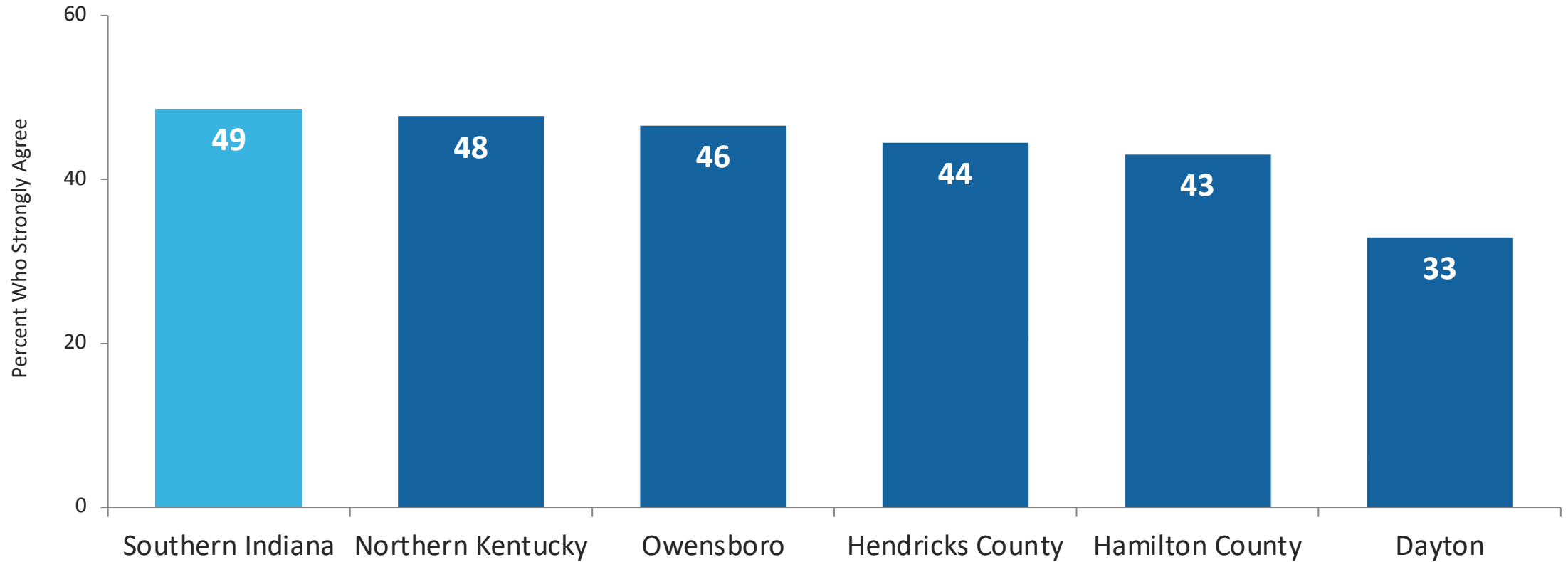
Southern Indiana's Image vs. Competition — Sports and Recreation

Base: Residents of Southern Indiana's Regional Advertising Markets



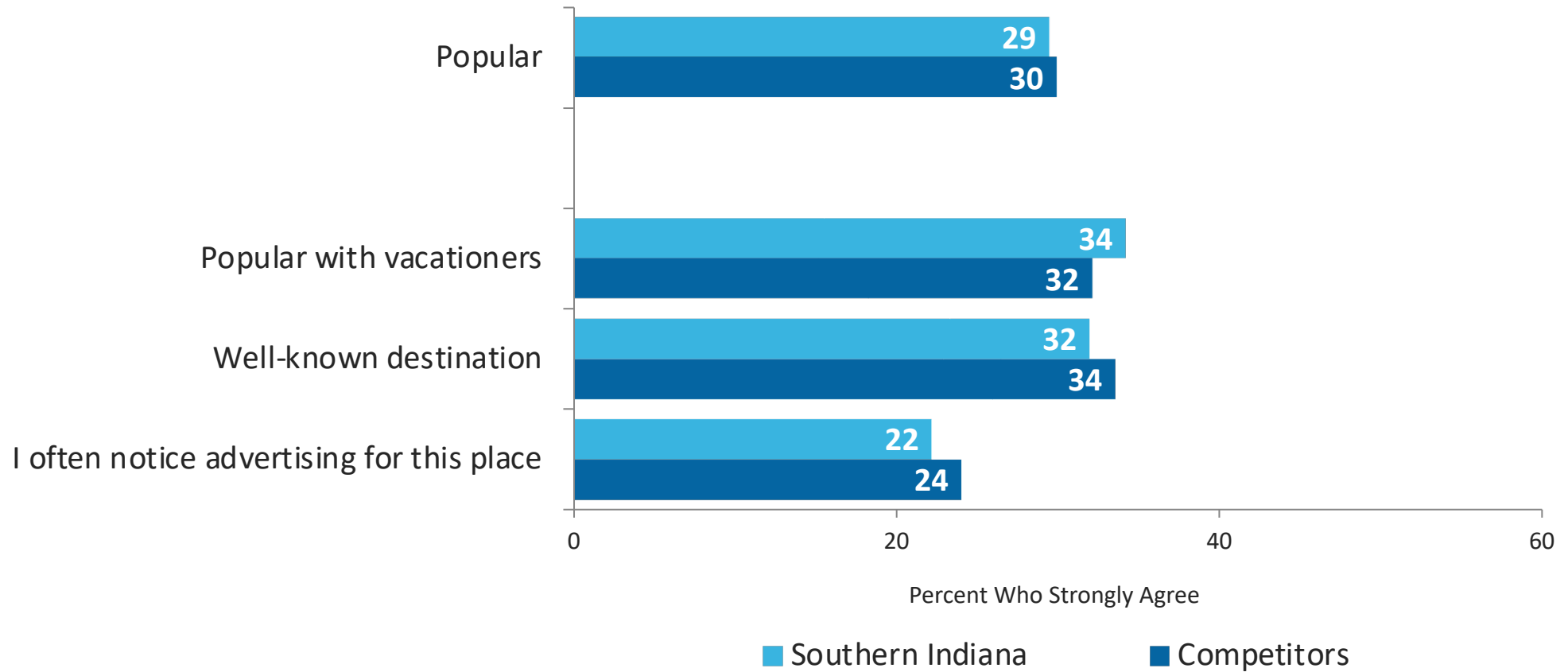
Southern Indiana's Image vs. Competition — Sports and Recreation

Base: Residents of Southern Indiana's Regional Advertising Markets



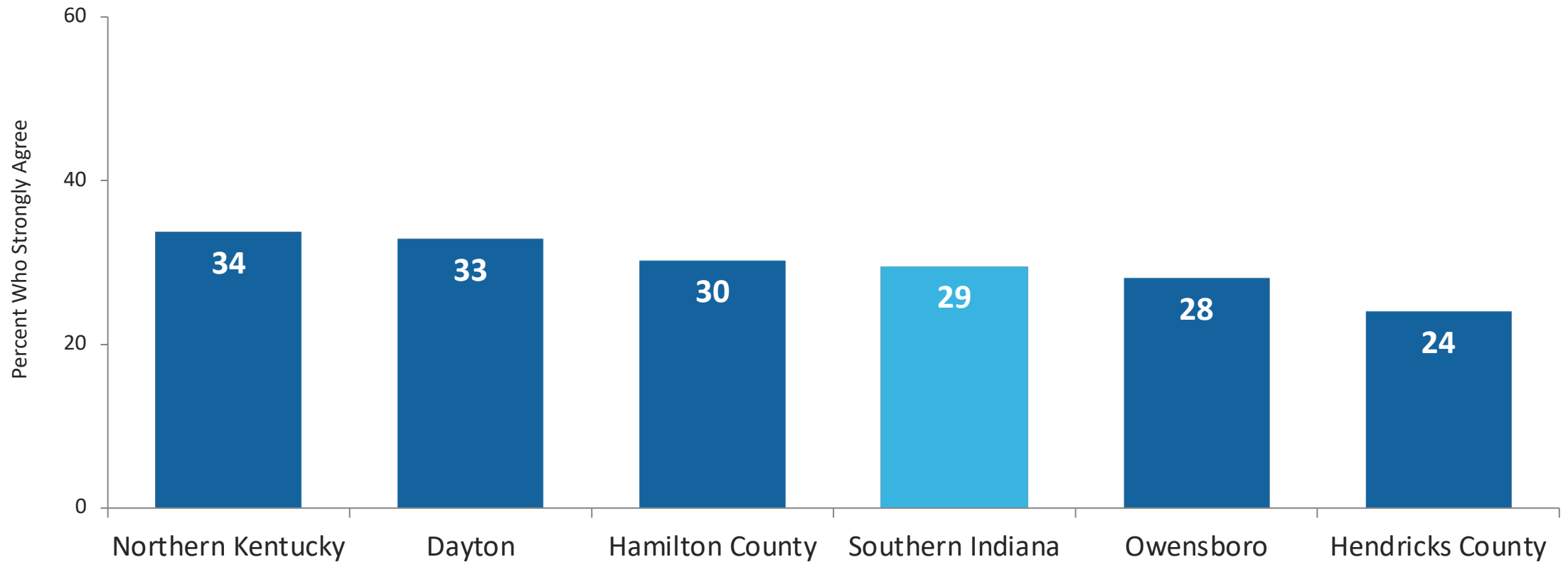
Southern Indiana's Image vs. Competition — Popular

Base: Residents of Southern Indiana's Regional Advertising Markets



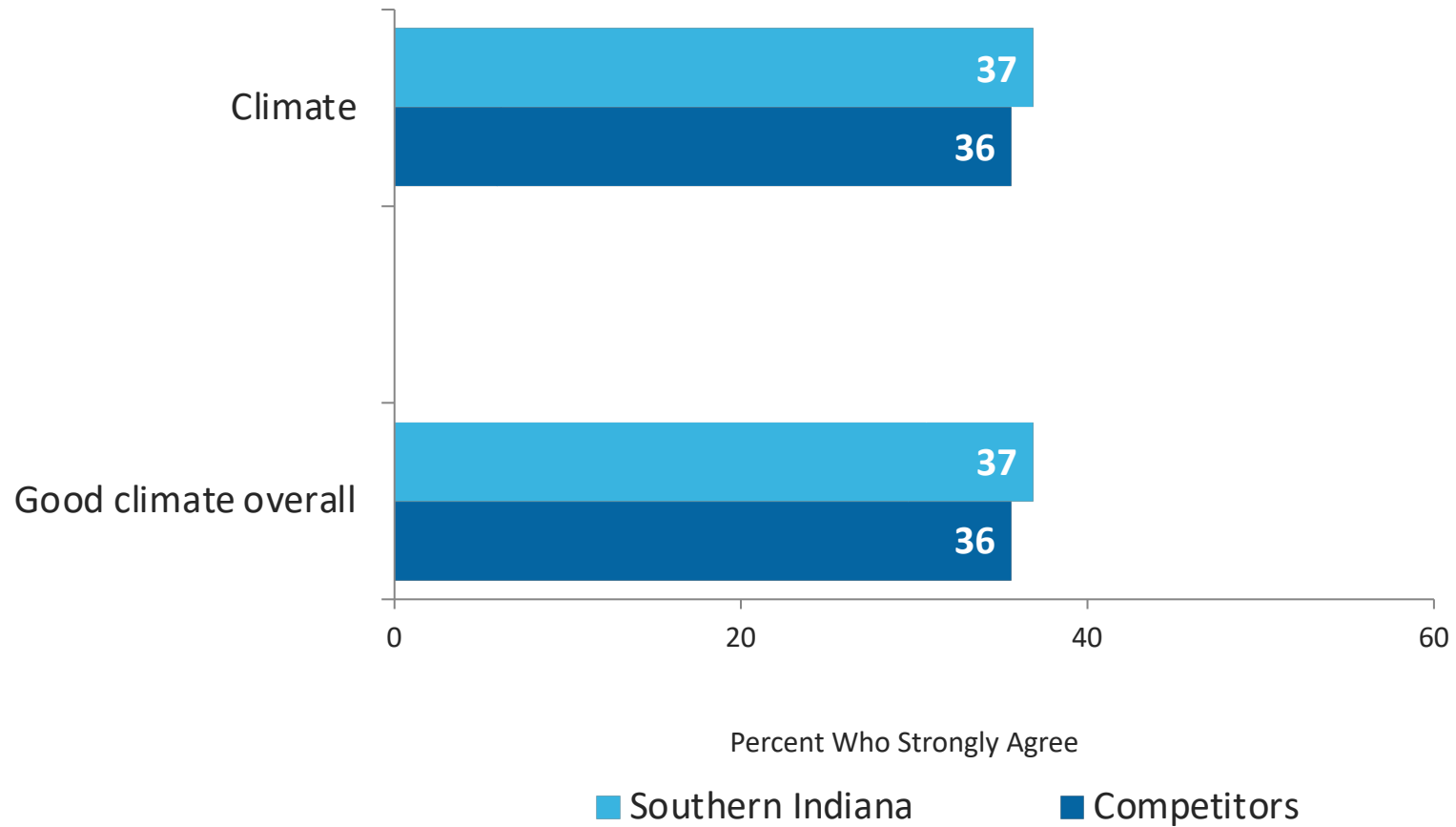
Southern Indiana's Image vs. Competition — Popular

Base: Residents of Southern Indiana's Regional Advertising Markets



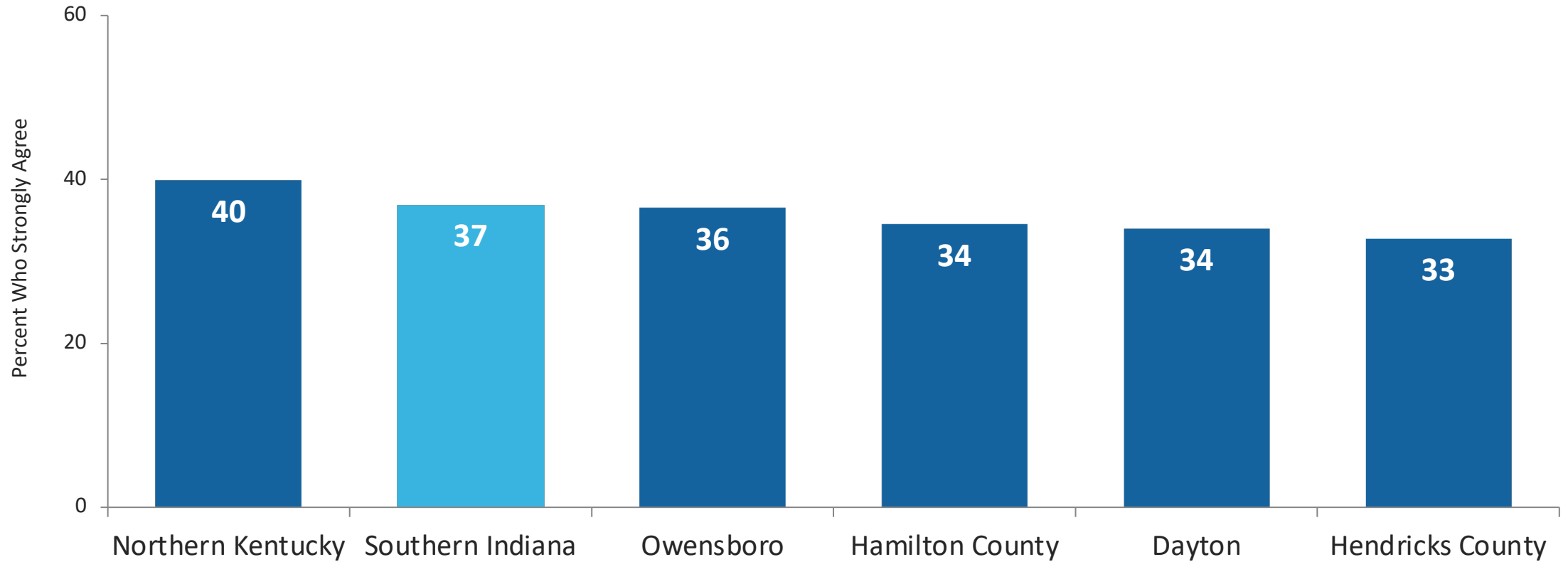
Southern Indiana's Image vs. Competition — Climate

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition — Climate

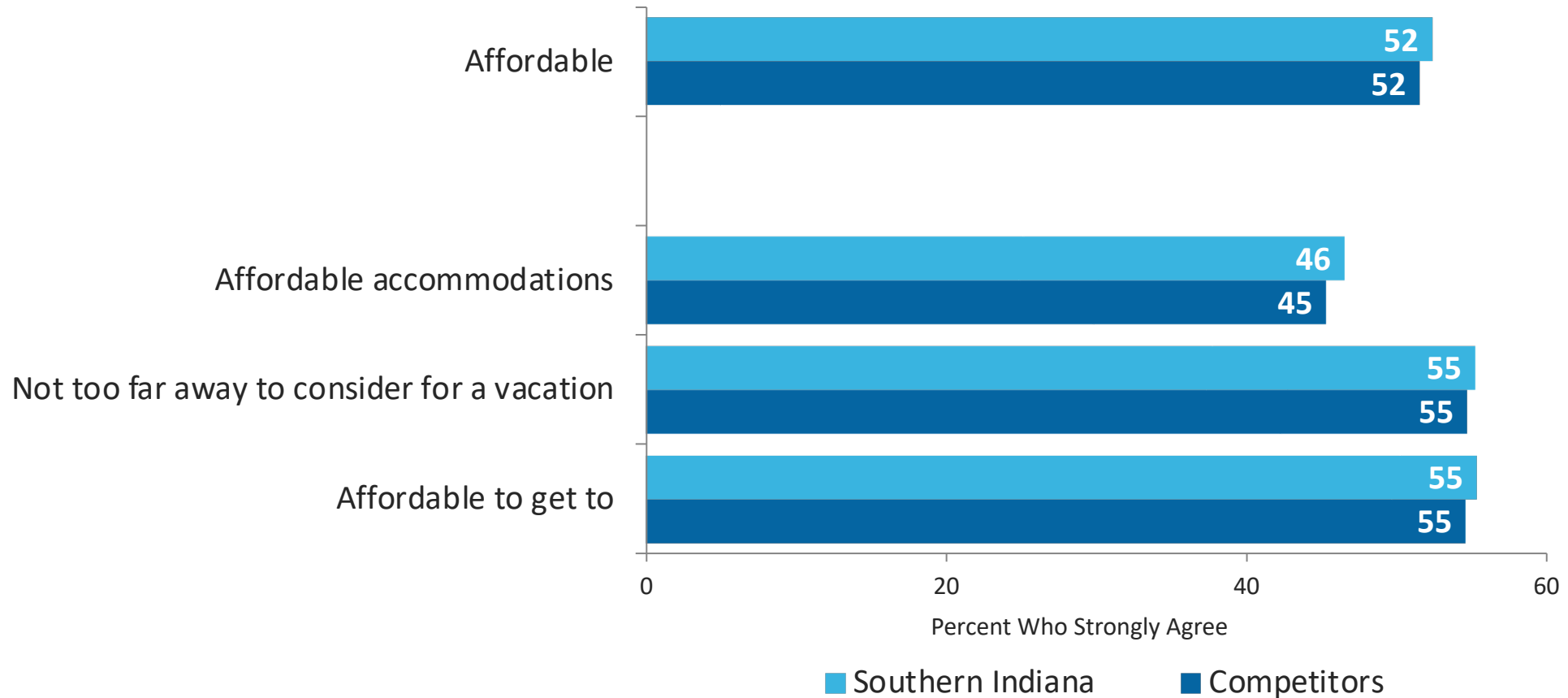
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

— Affordable

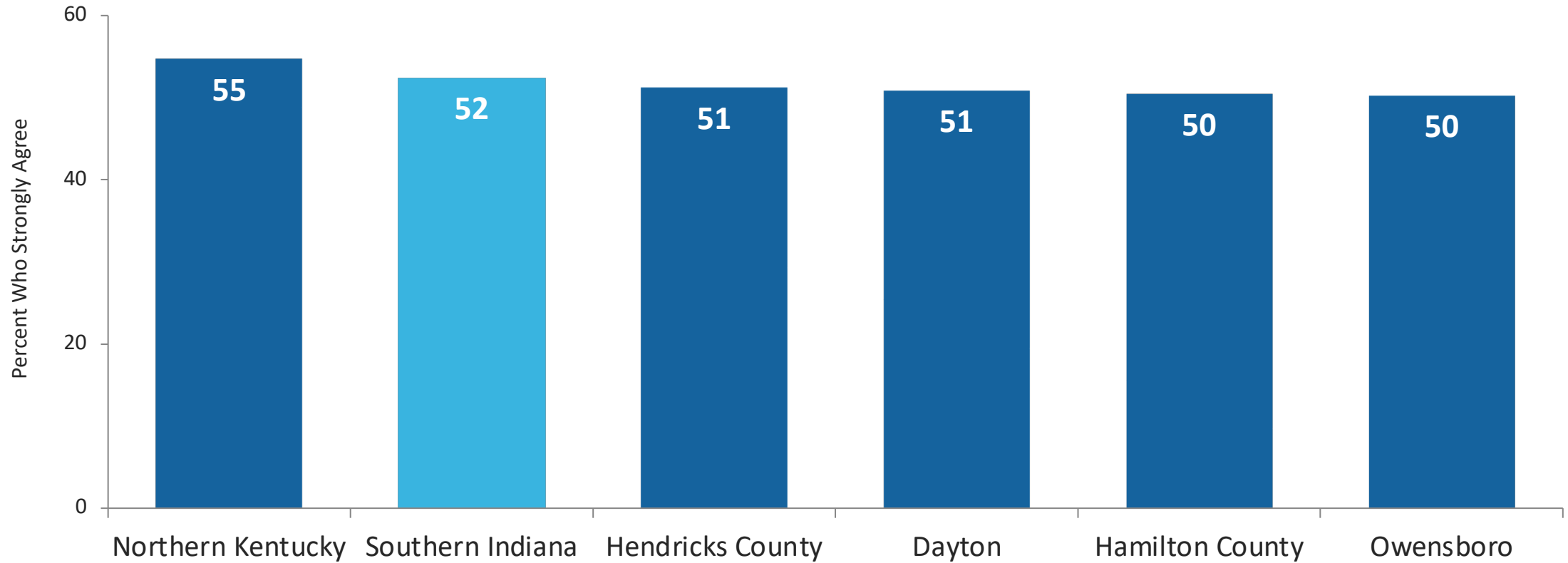
Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image vs. Competition

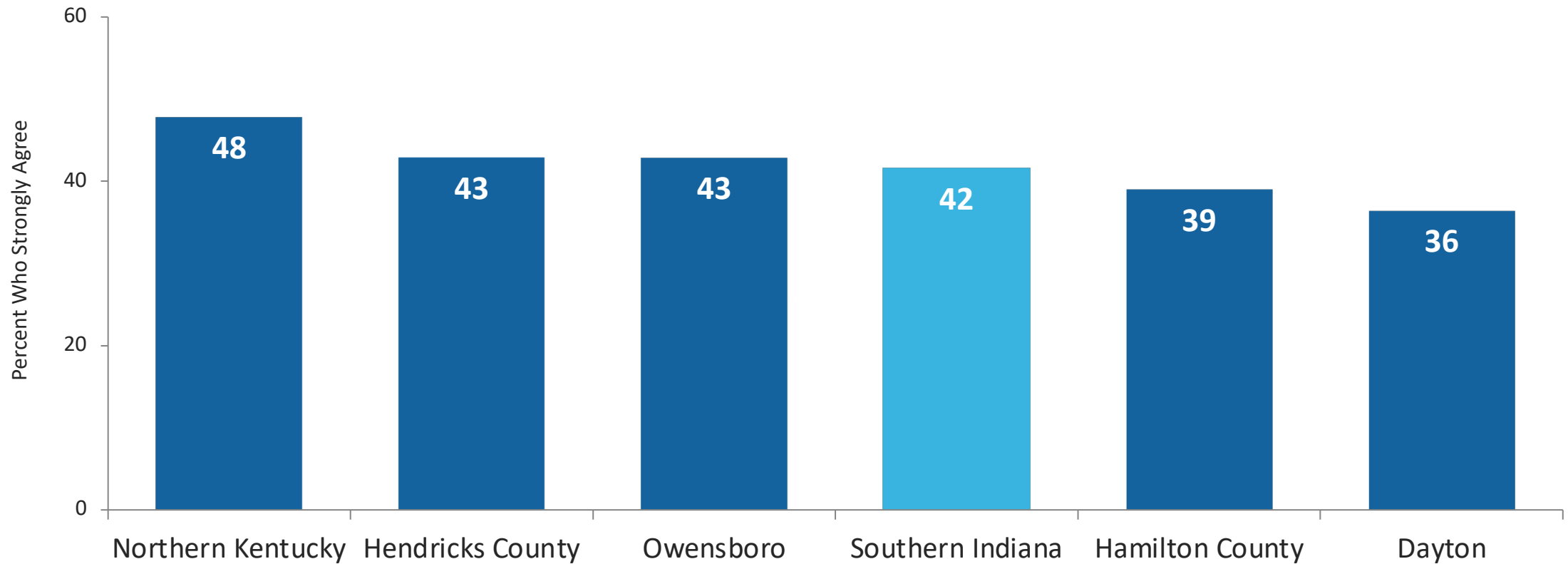
— Affordable

Base: Residents of Southern Indiana's Regional Advertising Markets



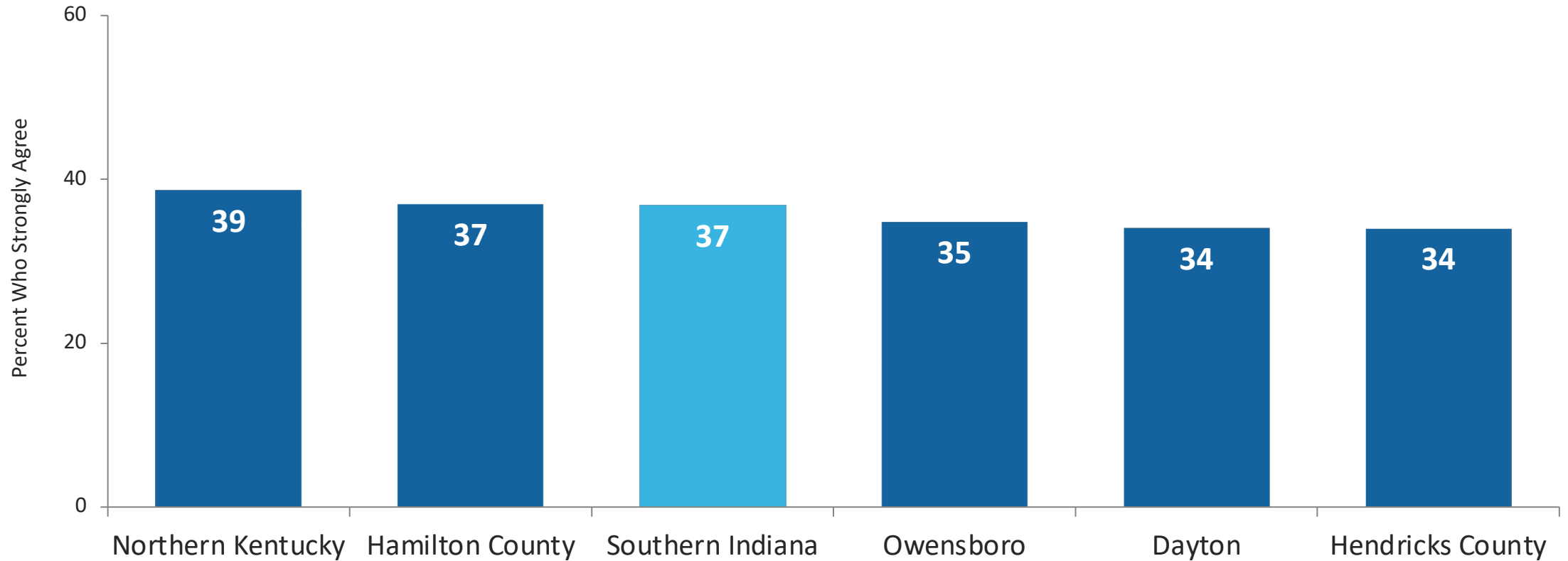
Southern Indiana's Overall Image vs. Competition — “Excellent Vacation Value for the Money”

Base: Residents of Southern Indiana's Regional Advertising Markets



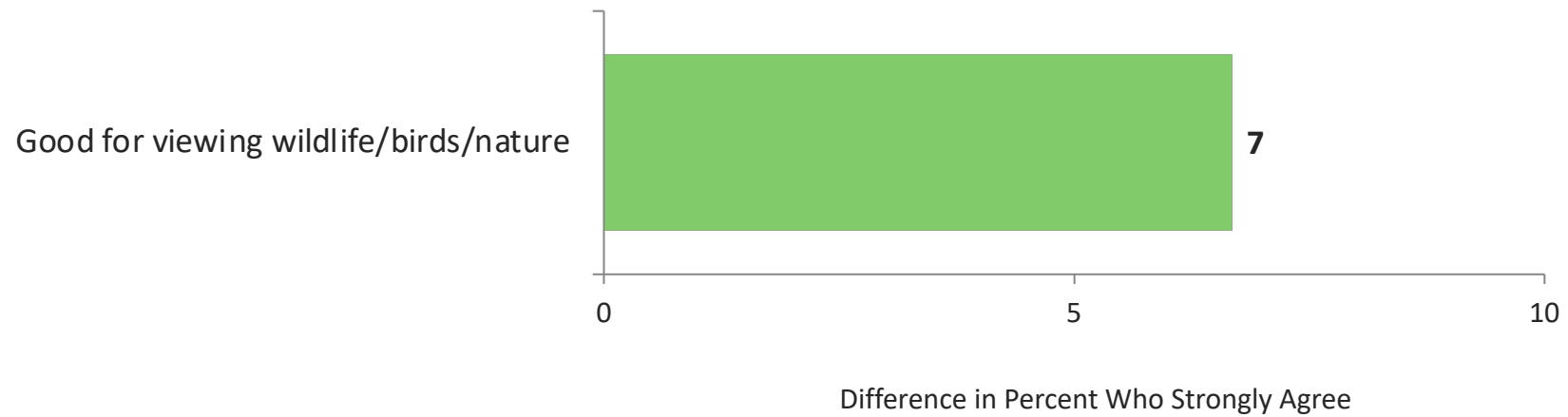
Southern Indiana's Overall Image vs. Competition — “An Environmentally Conscious Destination”

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image Strengths vs. Competition

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image Weaknesses vs. Competition

Base: Residents of Southern Indiana's Regional Advertising Markets

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



Longwoods
INTERNATIONAL

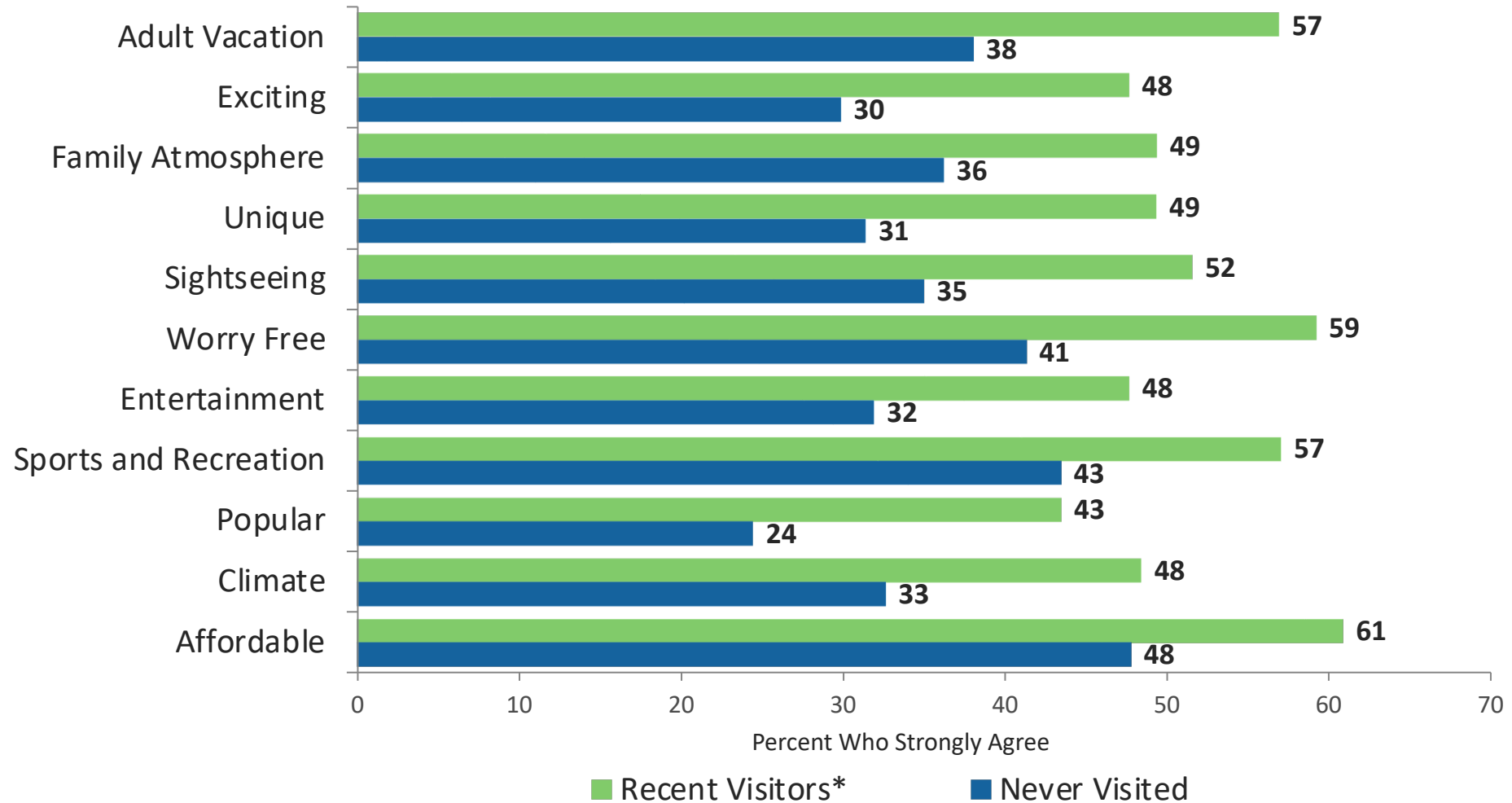
Southern Indiana's Product Delivery

Product Delivery

- When we compare the image ratings of people who have never visited Southern Indiana 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 people who have experienced Southern Indiana recently were especially impressed with:
 - Good place to relax
 - Excellent vacation value for the money
 - Provides a unique vacation experience
 - Good for an adult vacation
 - Beautiful scenery
 - Well-known destination
- Travelers who visited Southern Indiana recently rated all ten Hot Buttons higher than those who have never been to Southern Indiana.
- Among the dimensions evaluated, there were no areas where visitors felt Southern Indiana failed to live up to expectations.

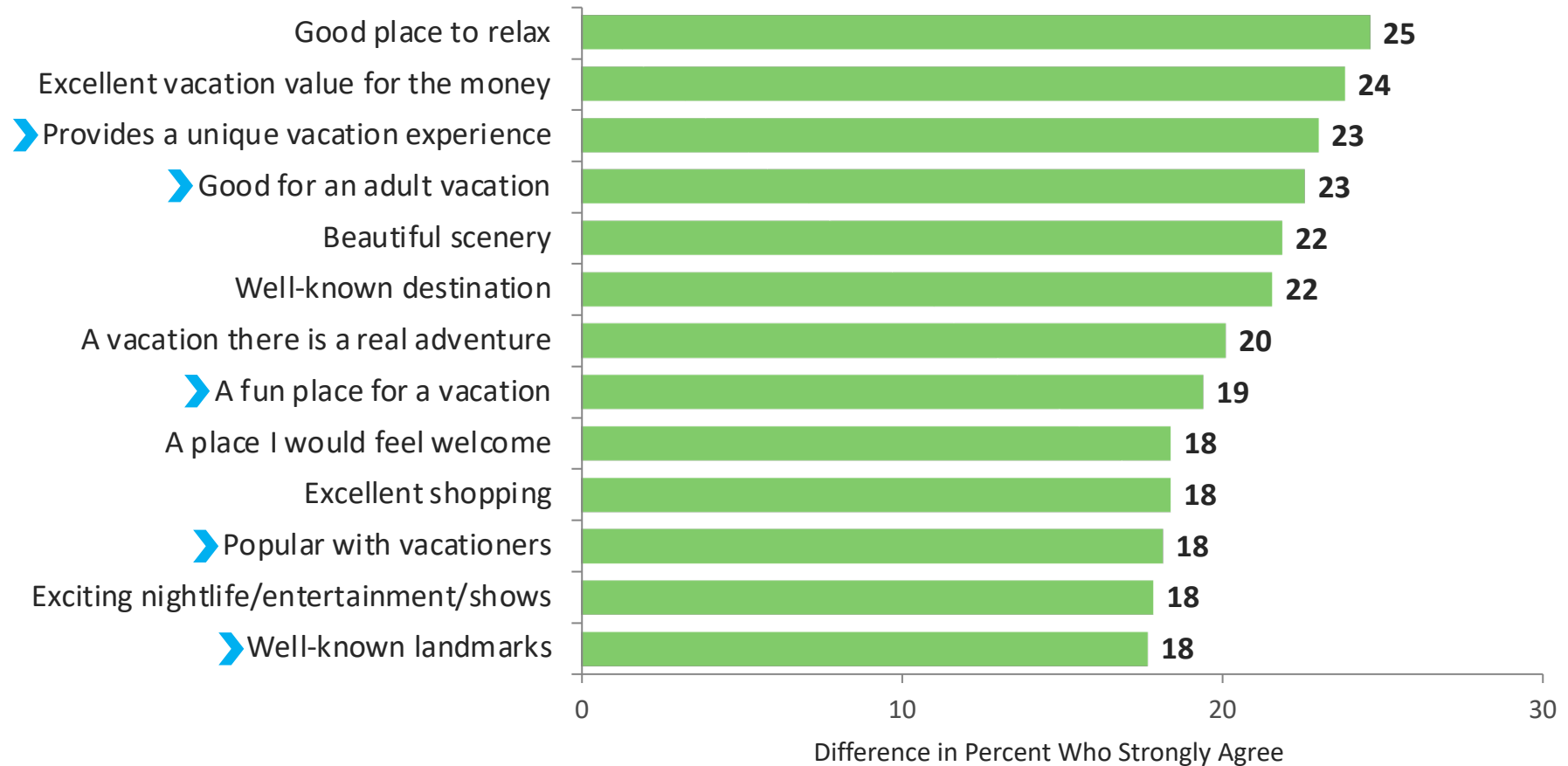
Southern Indiana's Product vs. Image

Base: Residents of Southern Indiana's Regional Advertising Markets



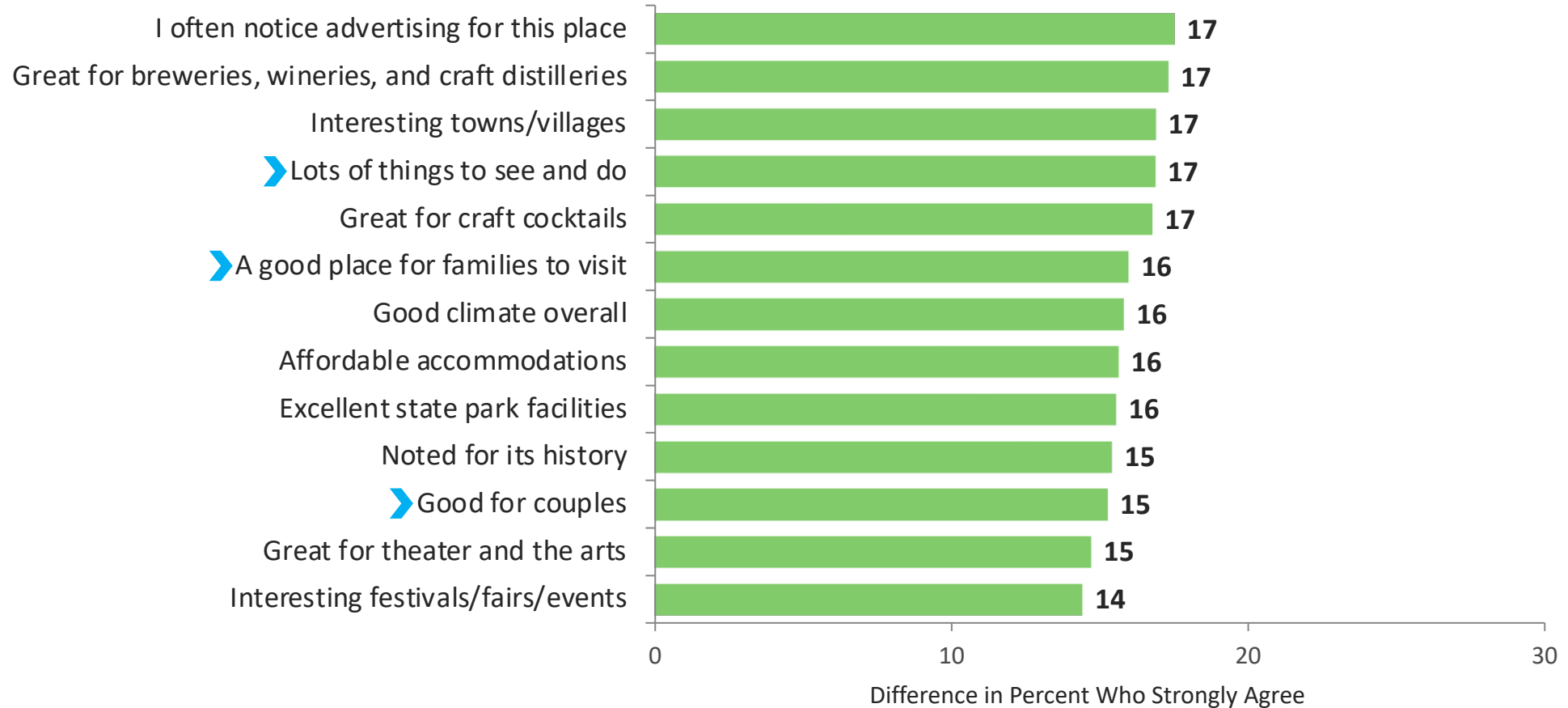
Top Product Strengths vs. Image

Base: Residents of Southern Indiana's Regional Advertising Markets



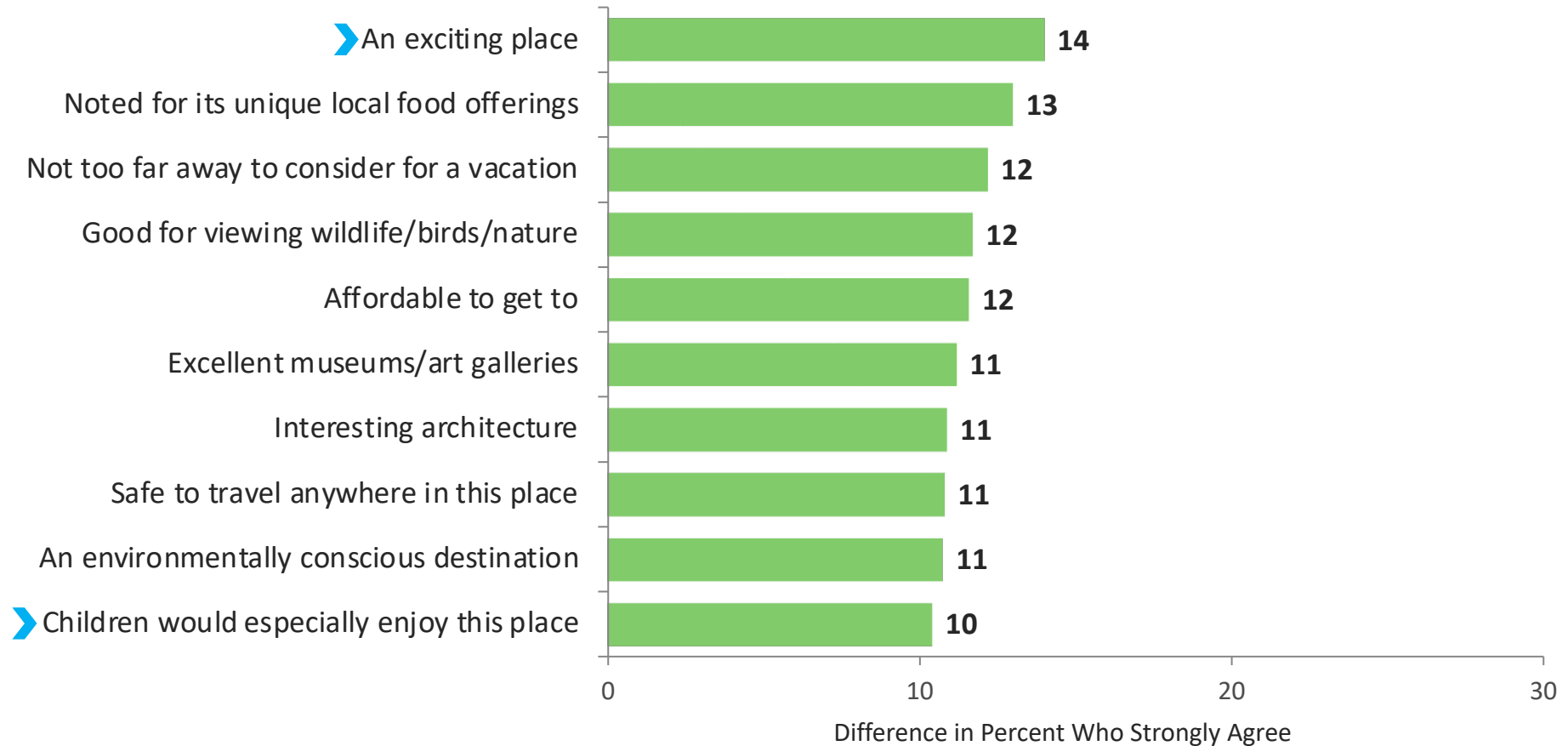
Top Product Strengths vs. Image (Cont'd)

Base: Residents of Southern Indiana's Regional Advertising Markets



Top Product Strengths vs. Image (Cont'd)

Base: Residents of Southern Indiana's Regional Advertising Markets



Top Product Weaknesses vs. Image

Base: Residents of Southern Indiana's Regional Advertising Markets

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



Halo Effect on Economic Development Image

Halo Effect Analysis

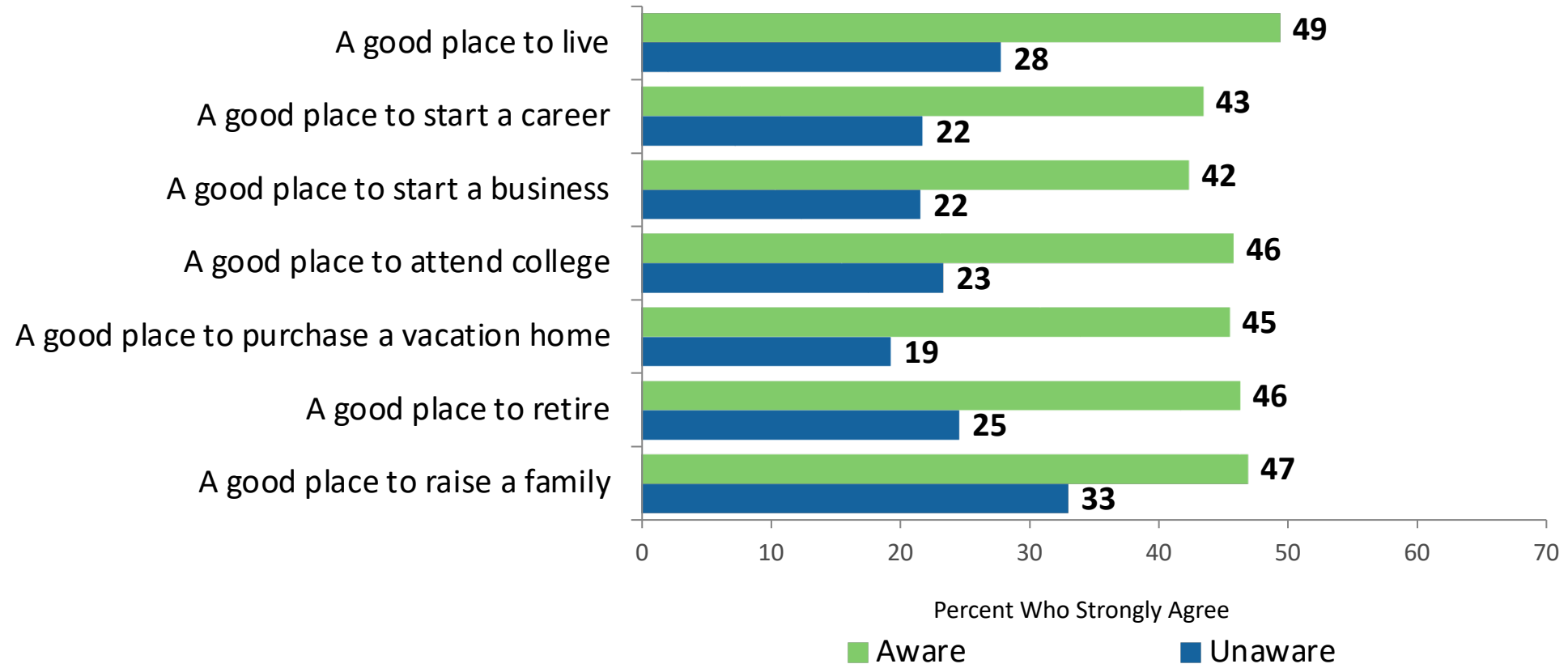
- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for Southern Indiana 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 Southern Indiana 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.

Halo Effect Analysis

- The research compared consumers' ratings of Southern Indiana on economic development image attributes by those who had not seen the campaign or visited Southern Indiana with those who did see the tourism ads and/or visited.
- In every case, SoIN's tourism advertising and subsequent visitation significantly improved the image of Southern Indiana for a wide range of economic development objectives.
- Those who saw the advertising rated Southern Indiana higher on all the economic development indicators included in this study, as did those who visited Southern Indiana during the past two years.
- 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 Southern Indiana.

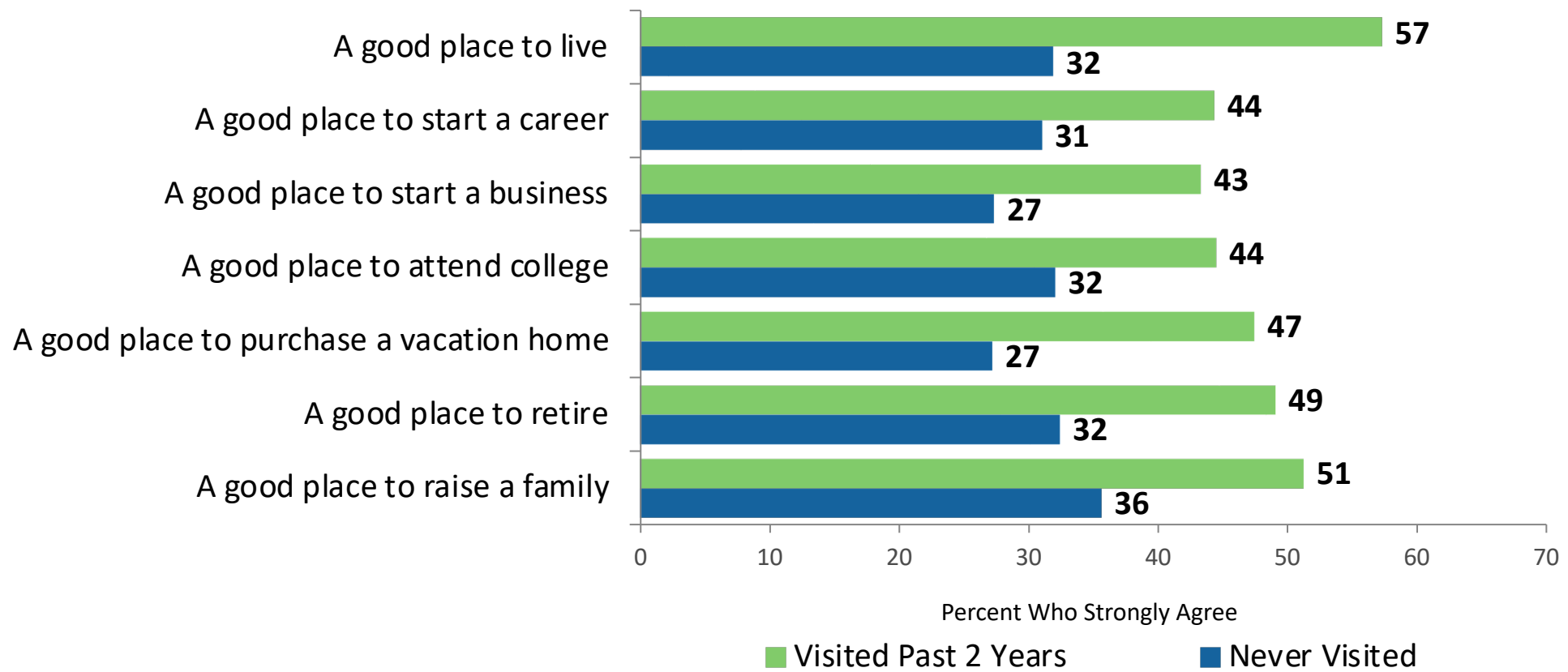
Impact of *Tourism Ad Awareness* on Southern Indiana's Economic Development Image

Base: Residents of Southern Indiana's Advertising Markets*



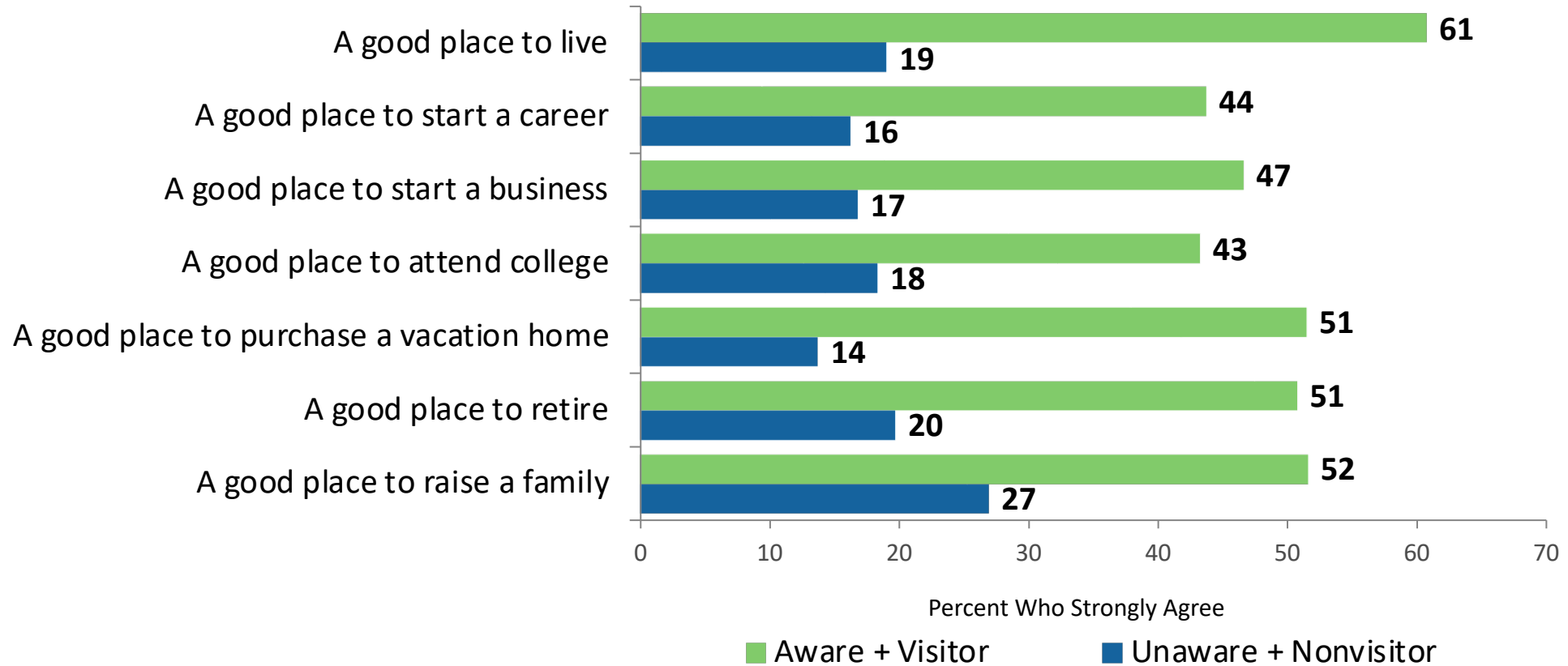
Impact of *Visitation* on Southern Indiana's Economic Development Image

Base: Residents of Southern Indiana's Advertising Markets*



Impact of Ad Awareness *plus* Visitation on Southern Indiana's Economic Development Image

Base: Residents of Southern Indiana's Advertising Markets*

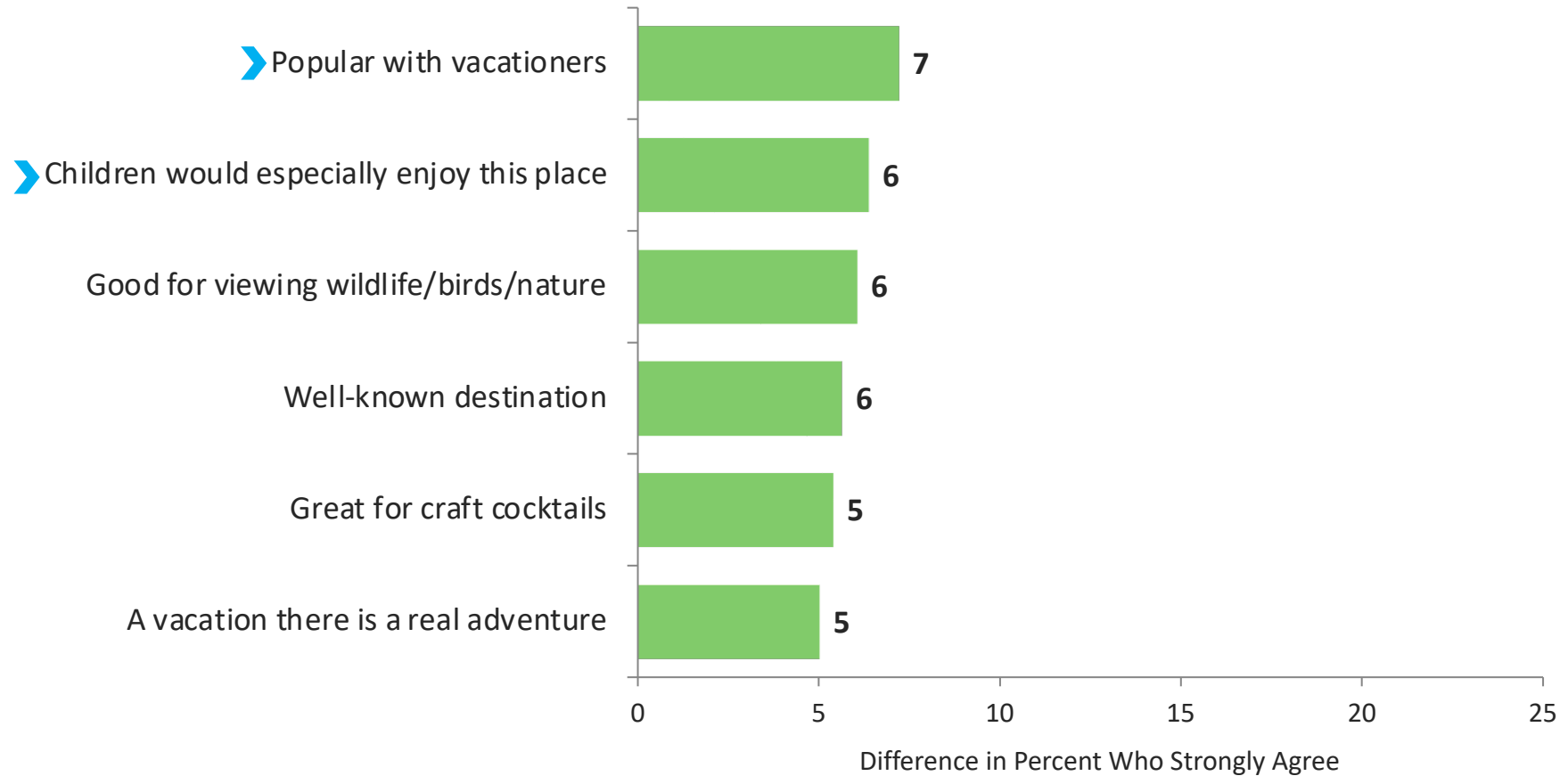




**Appendix: Southern
Indiana's Image
Strengths &
Weaknesses vs.
Individual Competitors**

Southern Indiana's Image Strengths vs. Hendricks County

Base: Residents of Southern Indiana's Regional Advertising Markets



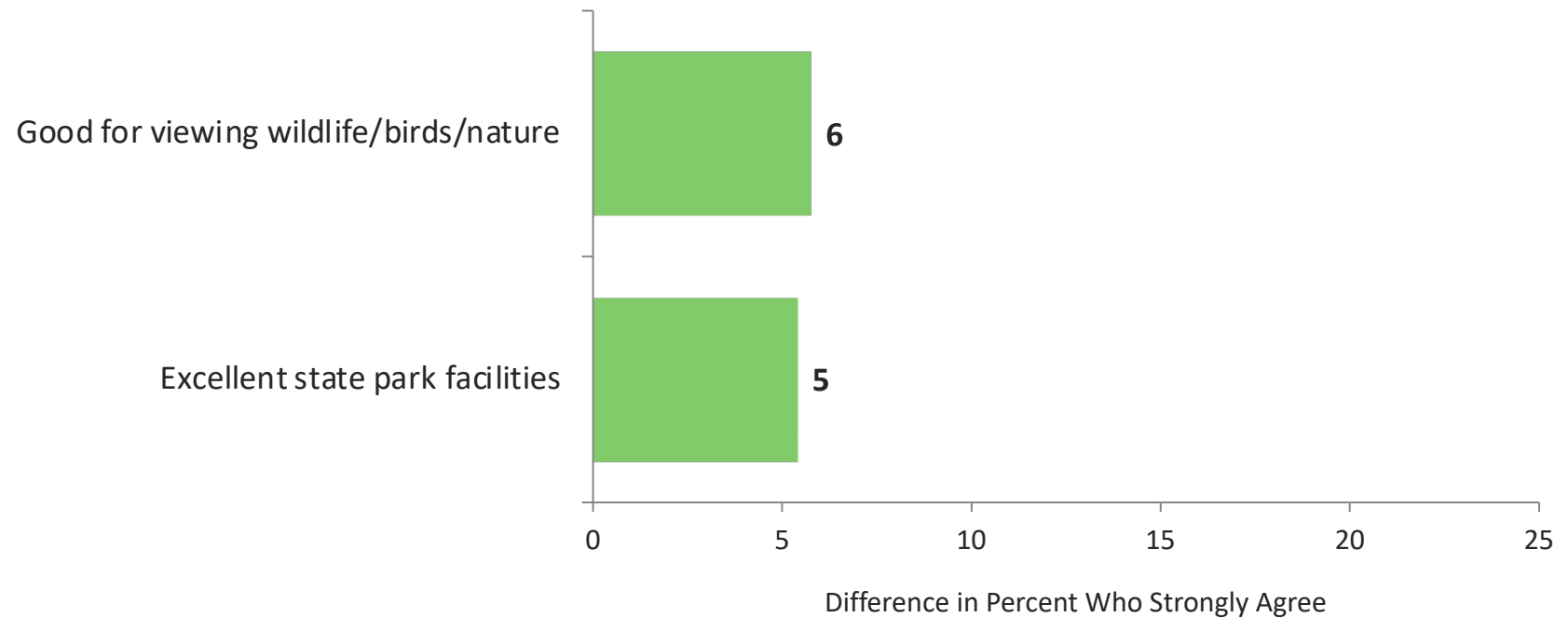
Southern Indiana's Image Weaknesses vs. Hendricks County

Base: Residents of Southern Indiana's Regional Advertising Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. HENDRICKS COUNTY**

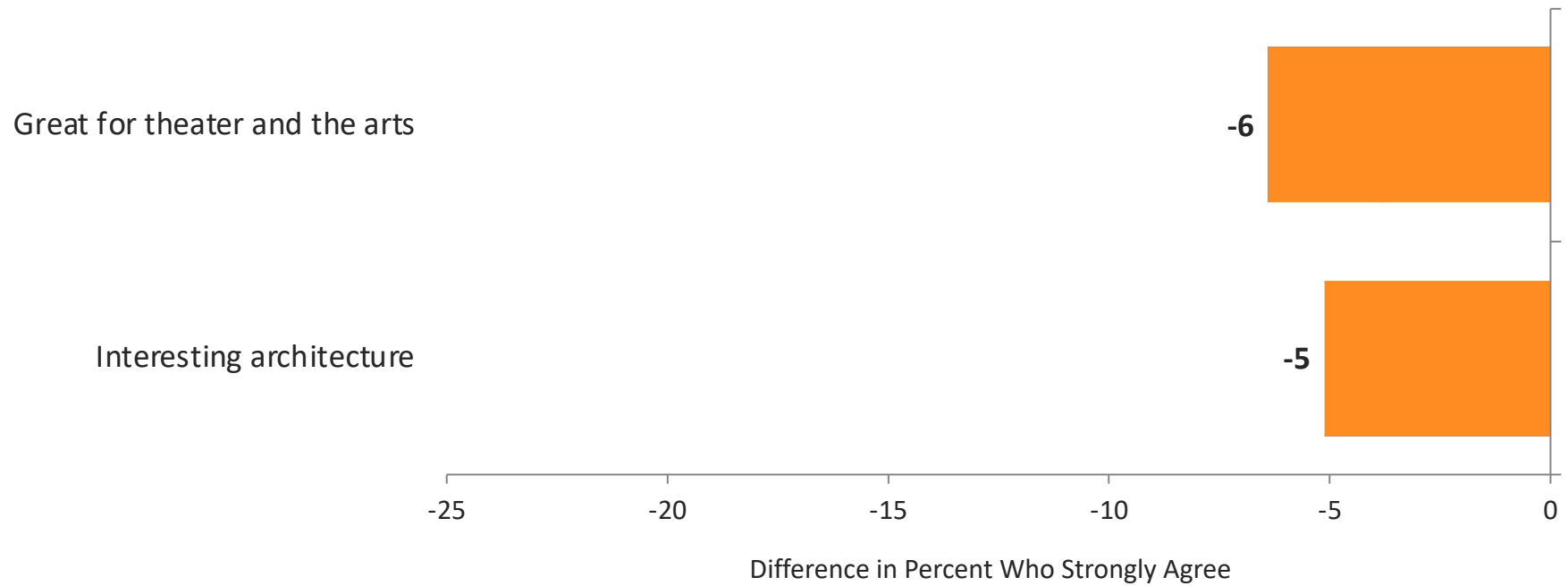
Southern Indiana's Image Strengths vs. Hamilton County

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image Weaknesses vs. Hamilton County

Base: Residents of Southern Indiana's Regional Advertising Markets



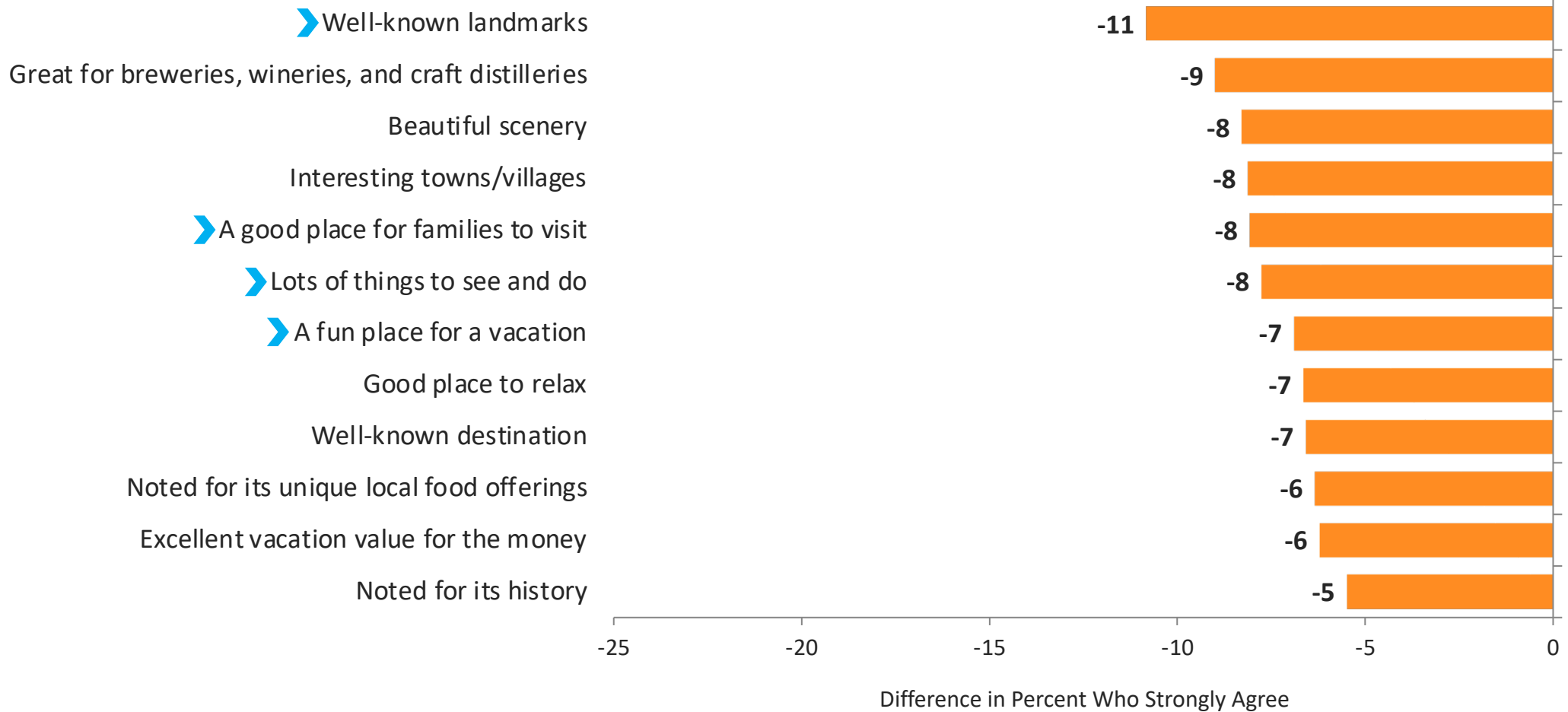
Southern Indiana's Image Strengths vs. Northern Kentucky

Base: Residents of Southern Indiana's Regional Advertising Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS VS.
NORTHERN KENTUCKY**

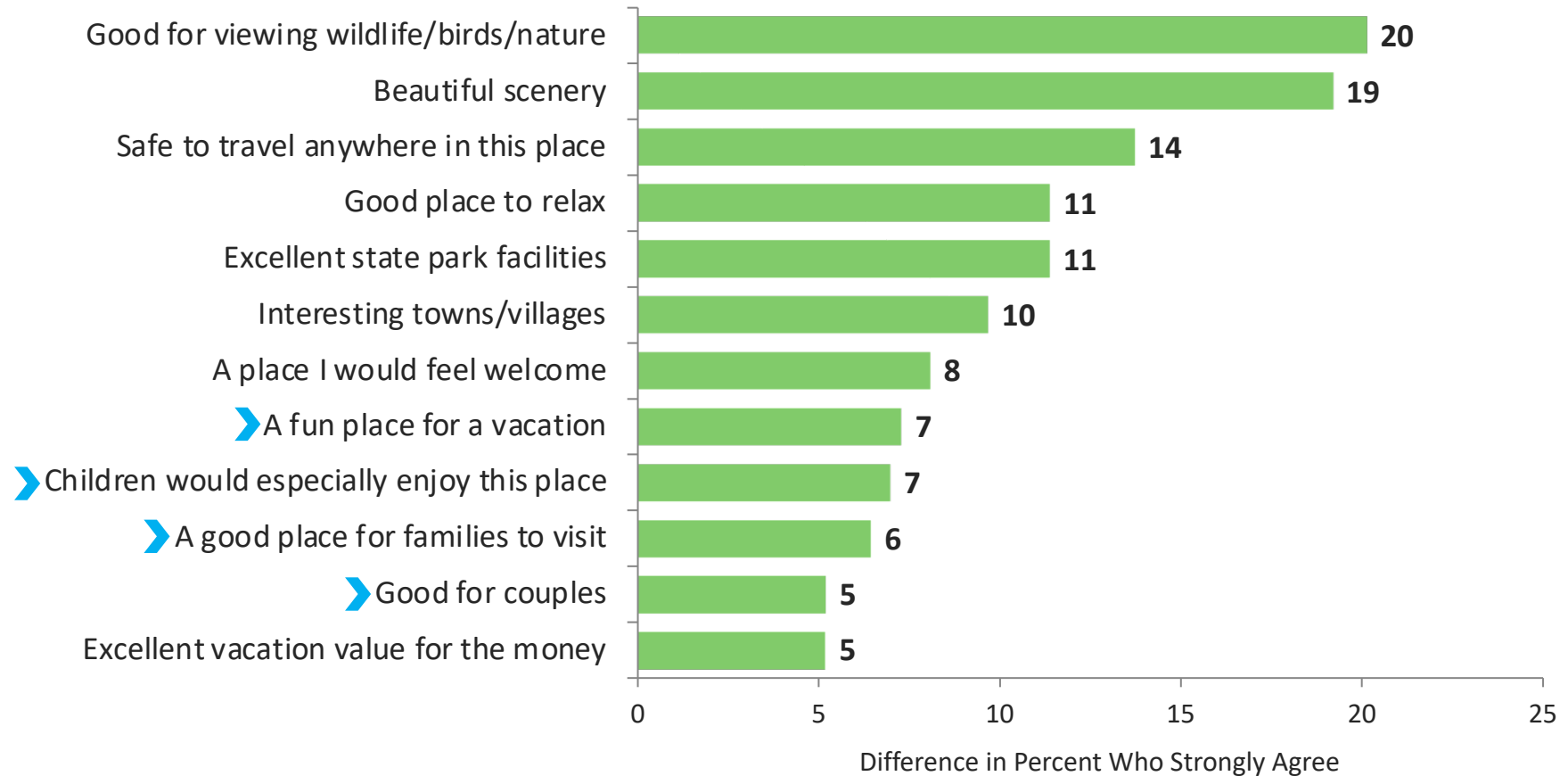
Southern Indiana's Image Weaknesses vs. Northern Kentucky

Base: Residents of Southern Indiana's Regional Advertising Markets



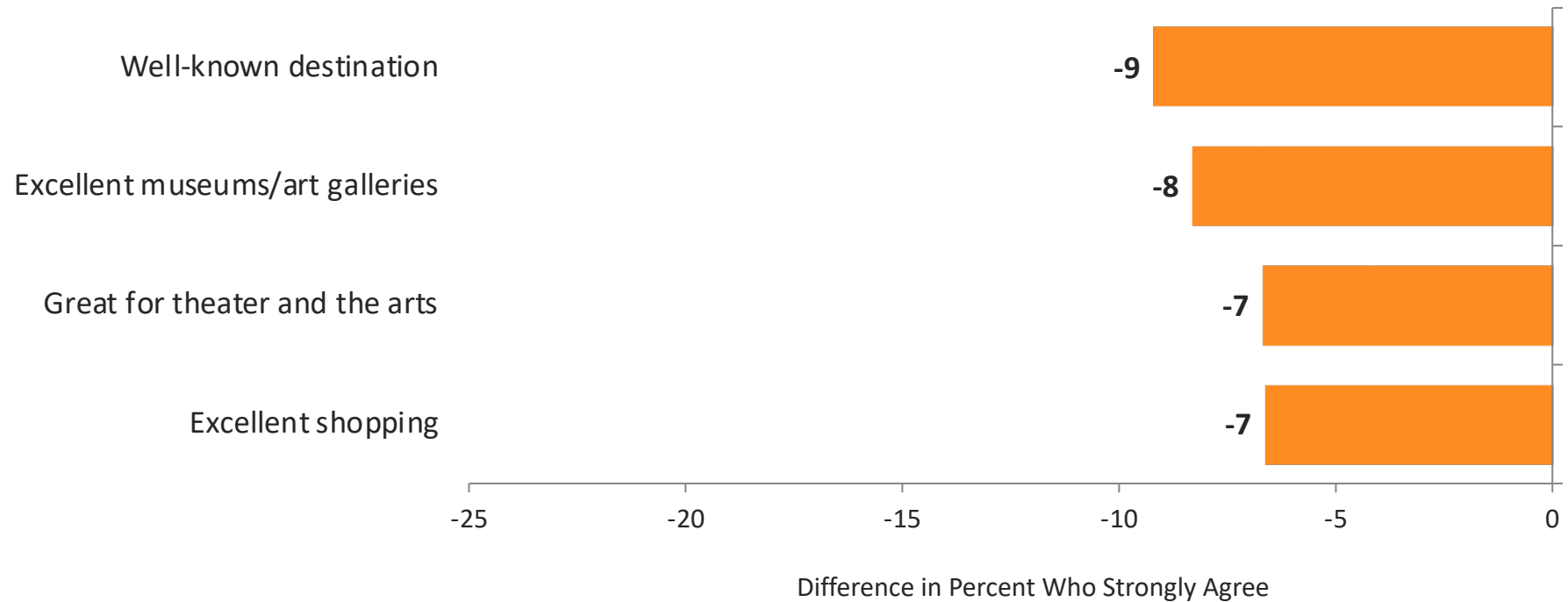
Southern Indiana's Image Strengths vs. Dayton

Base: Residents of Southern Indiana's Regional Advertising Markets



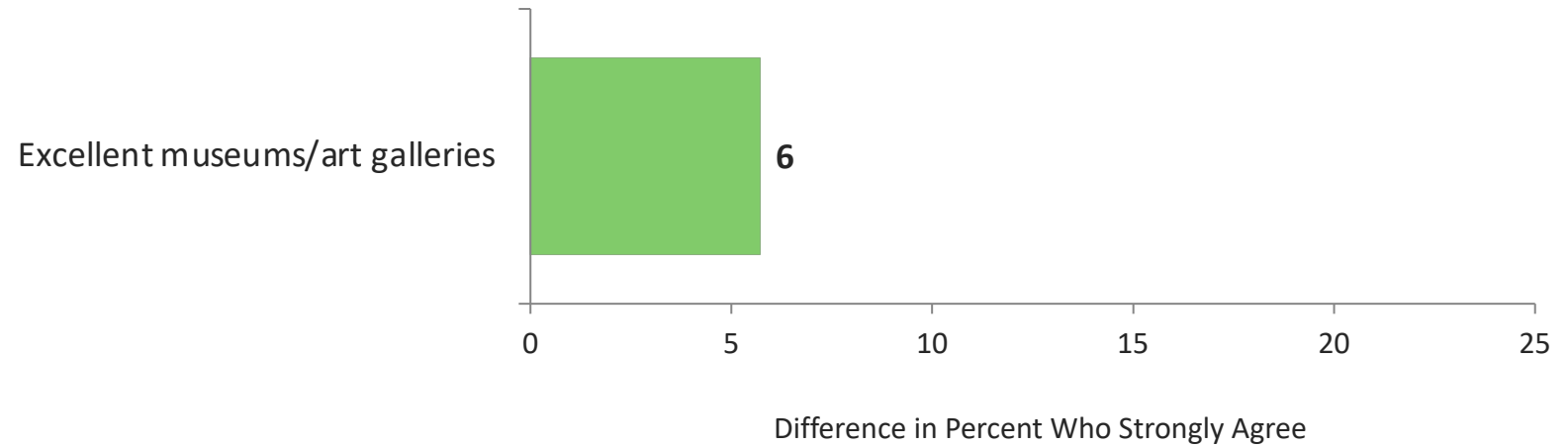
Southern Indiana's Image Weaknesses vs. Dayton

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image Strengths vs. Owensboro

Base: Residents of Southern Indiana's Regional Advertising Markets



Southern Indiana's Image Weaknesses vs. Owensboro

Base: Residents of Southern Indiana's Regional Advertising Markets

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