

KTIA KENTUCKY
TRAVEL INDUSTRY
ASSOCIATION



NOVEMBER 2025

A Talent Recruitment and Retention Strategy for Kentucky

Tourism's Pivotal Role in Attracting and Retaining Talent

Introductions



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Research



ECONOMIC DEVELOPMENT



TOURISM



TALENT ATTRACTION

CITIES

REGIONS

STATES

COUNTRIES

The leader in marketing places



65 YRS

Specializing in
marketing places



500 +

Unique places
and destinations



80 +

People with a
passion for places

NEW YORK • DENVER • CHARLOTTE • LOS ANGELES • ORLANDO • CINCINNATI • TORONTO • VANCOUVER • MONTREAL

The Community Vitality Wheel

1. VISIT

If you built a place where people want to visit, then you have built a place where people want to live.

2. LIVE

And if you built a place where people want to live, then you have built a place where people want to work.



4. INVEST

And if you built a place where business and residents will invest, then you have built a place where people will want to visit.

3. WORK

And if you built a place where people want to work, then you have built a place where business and residents will invest.

The state of the labor market

72%

Of CEOs say talent gaps and shortages are their top business challenge

85M

Jobs could go unfilled globally by 2030 due to skills mismatches

4.39M

Shortage of workers the U.S. will face by 2030

\$8.5
Trillion

**in unrealized annual
global revenues due to
the talent shortage
by 2030**



TALENT ATTRACTION

Rooted in Research

DCI's national talent research study, "Talent Wars," is the leading intelligence behind all of our marketing campaigns. Now in its ninth edition, the report seeks to understand the "path to purchase" for jobs and relocation decisions, which informs the messaging, strategies, and tactics that we use to reach talent on behalf of our client communities.





**Workforce
Development**



**Talent
Attraction**

Our Approach For Kentucky



I Research & Discovery

- Existing Strategy Assessment
- Competitive Assessment
- Target Market ID
- Perception Surveys
- Immersion Tour & Focus Groups
- Data Analysis
- Presentation of Findings

JULY '25-SEPTEMBER '25

II Stakeholder Engagement

- Strategic Planning & Marketing Workshop
- Establish Marketing Taskforce
- Preliminary Report and Budget Delivered

OCTOBER '25 – NOVEMBER '25

III Messaging Framework

- Brand Voice
- Brand Promise
- Messaging Pillars
- Key Messages

NOVEMBER '25-DECEMBER '25

IV Strategy & Action Plan

- Goals & Target Audiences
- Marketing Tactic Recommendations
- Timeline & Project Plan
- Budget
- KPIs
- Final Presentation

DECEMBER '25-MARCH '26

Research Overview

3

Surveys of Internal
and External
Audiences

20

Focus Groups

2,550+

Working Age
Residents/Executives Reached

Kentucky
California
Florida
Illinois
Indiana
Ohio
Tennessee
Texas

Covington
Frankfort
Lexington
Pikeville
Louisville
Owensboro
Paducah
Bowling Green

1

Competitive
Audit

Kentucky
FLORIDA
INDIANA
NORTH CAROLINA
OHIO

Five Takeaways for Kentucky

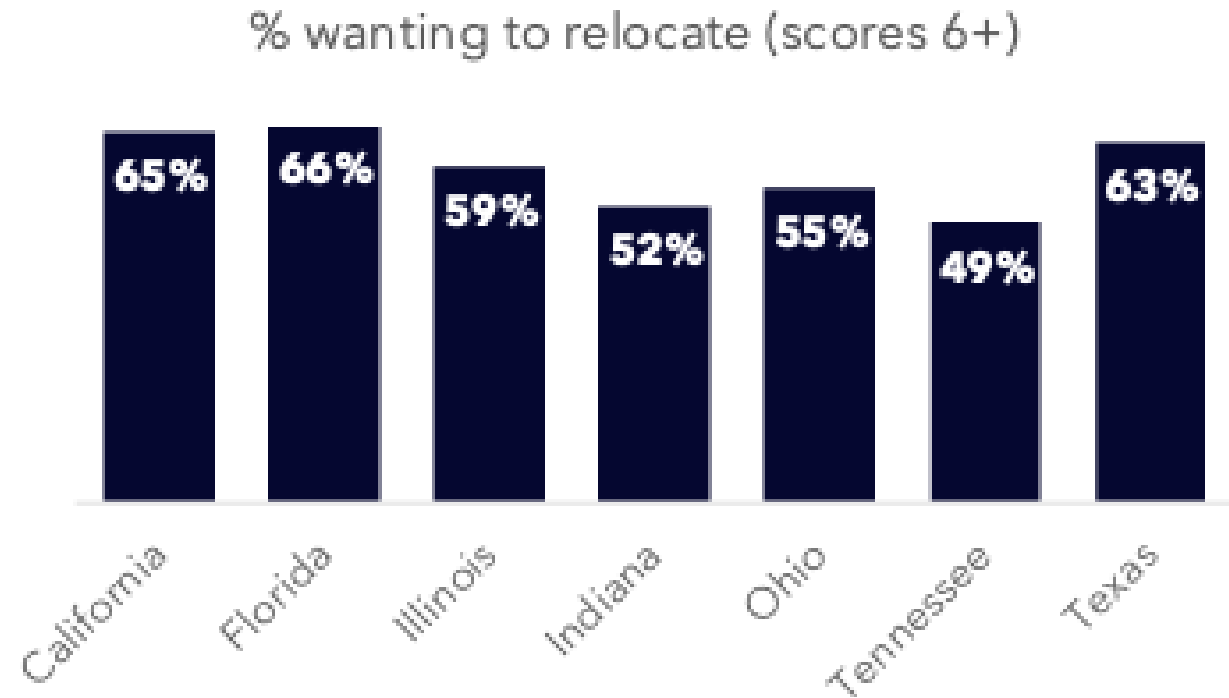
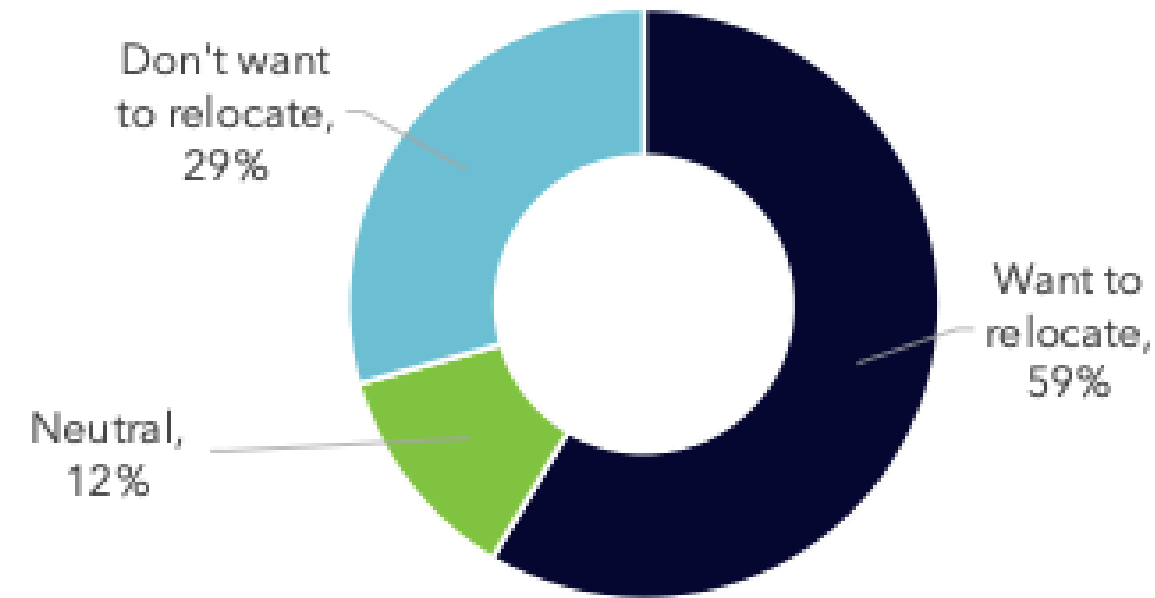
01

Quality of Life Drives Moves, But Jobs Seal the Deal.

People primarily relocate to improve their quality of life – and prioritize both practical and emotional factors – but the majority won't move without a job in place.

EXTERNAL TALENT

Nearly 6 in 10 respondents **want to relocate in the next 2 years**, higher rates among those in Florida, California and Texas.



Q. On a scale from 1 (not at all) to 10 (very much), how much do you **want** to relocate more than 100 miles away from where you are currently living within the next two years?

Top **Lifestyle** Factors

Please rate the importance of the following lifestyle factors if you were considering relocating to a new area more than 100 miles from your current location.

(1 = not important, 10 = very important)



What Does **Quality of Life** Mean to Talent?



67%

Will not relocate
without a job in
place



EXTERNAL TALENT

Top career-related factors include salary and benefits, jobs that match skill sets, and a good work/life balance.



8.5

Salaries relative to the cost of living



8.3

Access to benefits



8.2

A job opportunity that matches your skill set/educational level



8.2

Culture of good work/life balance



8.0

Advancement opportunities for yourself in your industry

Q. Please rate the importance of the following career/professional development-related factors if you were considering relocating to a new area more than 100 miles from your current location. (1=not important, 10=most important)

Nebraska
The Good Life
Is Calling

Nebraska

CONTACT

Cost of Living Calculator

Home > Cost of Living

Your salary will go **22% further** in Omaha NE than Chicago IL.
[More Info About Your Workplace Living Expenses and How to Enjoy the Abundant Lifestyle The Good Life has to offer](#)

Groceries cost about the same in Omaha NE.

Housing cost **47% less** in Omaha NE.

HOUSING TYPE	IL Chicago	NE Omaha	National Avg.
HOME PRICE	\$204,120.00	\$105,824.49	\$242,200.00
APARTMENT RENT	\$2,070.00	\$1,111.00	\$1,360.00

02

Kentucky Is a Blank Slate, But Perception Gaps Exist.

Lack of awareness, not negative perceptions, is the challenge. Kentucky scores high on affordability, safety, and outdoor recreation—but career advancement concerns prevent conversion.

EXTERNAL TALENT

Kentucky is **perceived positively as a place to visit** but received more moderate ratings as a place to live, work and advance one's career.



Q. Based on your experience or general perceptions, how would you rate Kentucky as a place to...? (1=poor, 10=excellent)

EXTERNAL TALENT

Kentucky receives strong scores on some of talent's “must have” livability factors.

Outdoor recreational opportunities	7.1
Housing cost	7.0
Cost of living	7.0
Welcoming/friendly local population	6.9
Housing availability	6.9
Overall quality of life	6.9
Family-friendly amenities	6.8
Safety/crime rates	6.7
Climate/weather	6.7
Ability to live/work/play without a long commute	6.6
Quality healthcare	6.6
Favorable tax environment	6.6
Higher education opportunities	6.6
Availability of childcare	6.4
Arts/cultural amenities	6.4
Quality of K-12 education system	6.3
Active social scene	6.3
Public transportation or walkable areas	6.3
Diverse population	6.2
Proximity to friends/others in same age/demo group	6.1
Nightlife	6.1
A “cool” factor	6.0
Proximity to family	5.8

Q. To the best of your ability, please rate Kentucky on the following quality of life factors: (1=poor, 10=excellent)

EXTERNAL TALENT

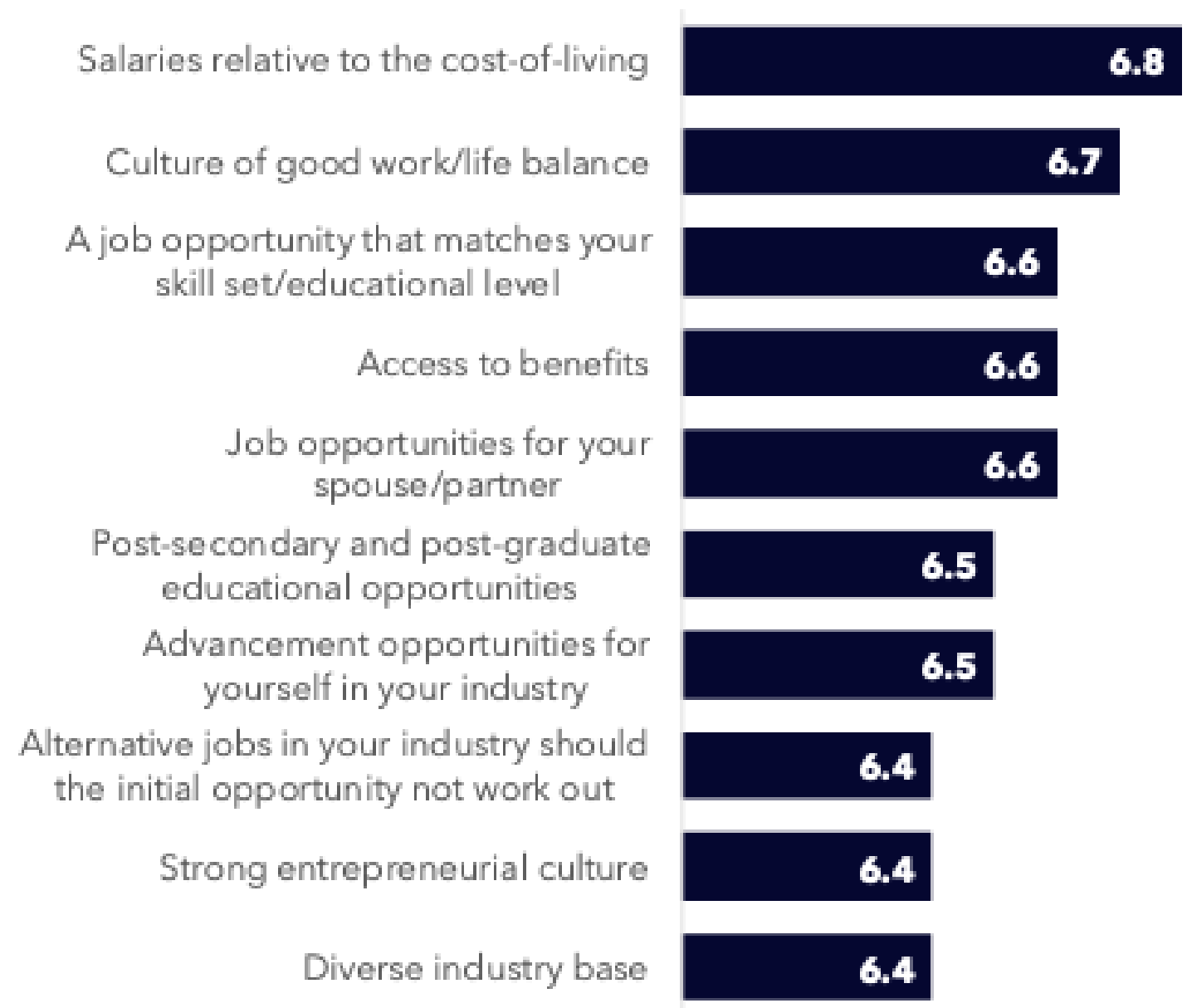
Kentucky as a Place to Live

Q: What three words and/or phrases come to mind when thinking about Kentucky as a place to *live*?



EXTERNAL TALENT

Kentucky receives moderately high scores on **salaries, work/life balance, job opportunities** and access to **benefits**.



Q: To the best of your ability, please rate Kentucky on access to the following career/professional development-related factors: (1=poor, 10=excellent)

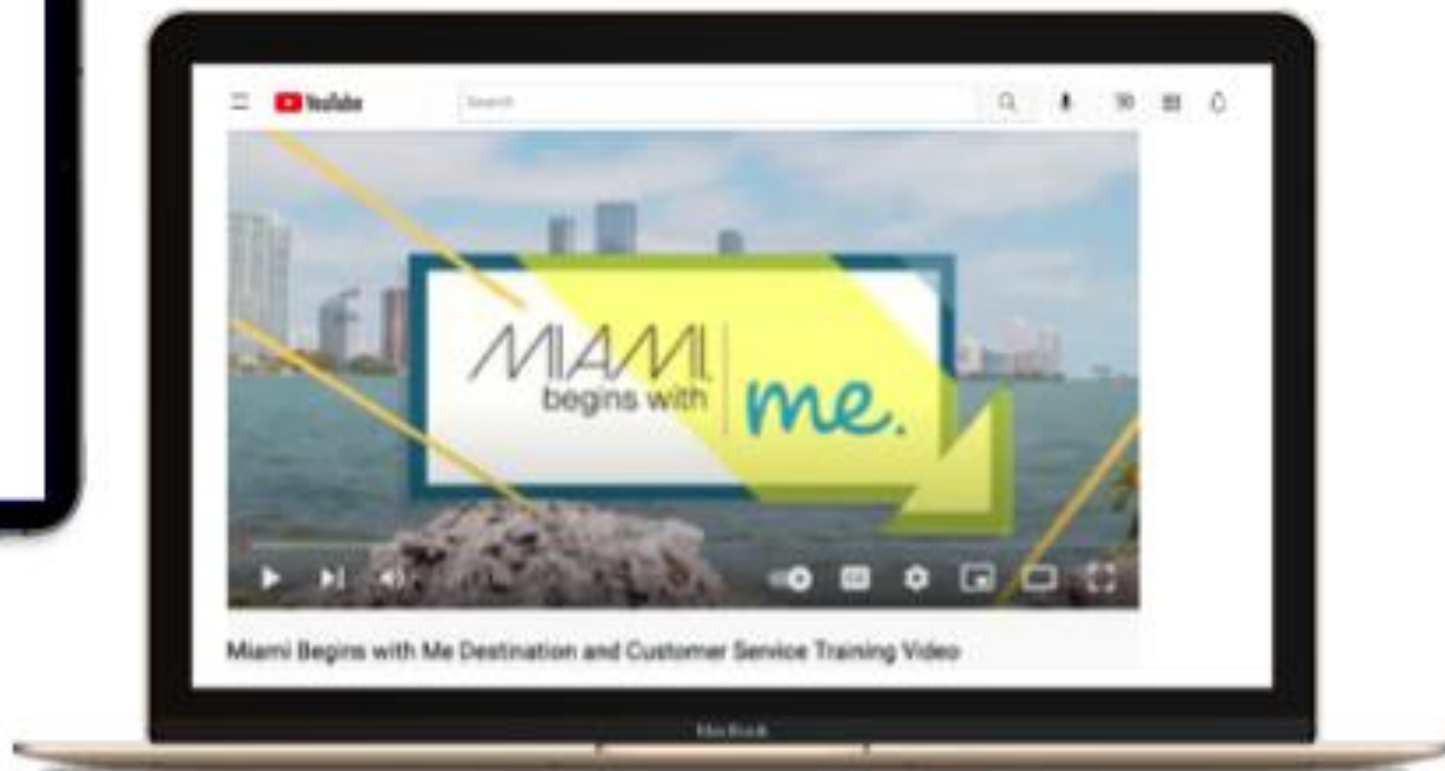


DESTINATION
Cleveland™



a location driving it

MIAMI
begins with *me.*
GREATER MIAMI & MIAMI BEACH



03

Familiarity Breeds Conversion. Activate Your Ambassadors.

Interest in relocation increases among those familiar with Kentucky. Word-of-mouth is highly influential. Target and leverage alumni, visitors (including VFR) boomerangs, transplants, and satisfied residents as authentic champions.



Kentucky is largely a **blank slate** for external talent

“There’s two parts of Kentucky, Louisville and Lexington and then the rest of the state where everything is rundown.”
– Indiana Resident

“Who are the big employers? What do people do? I have truly no idea”
– Ohio Resident

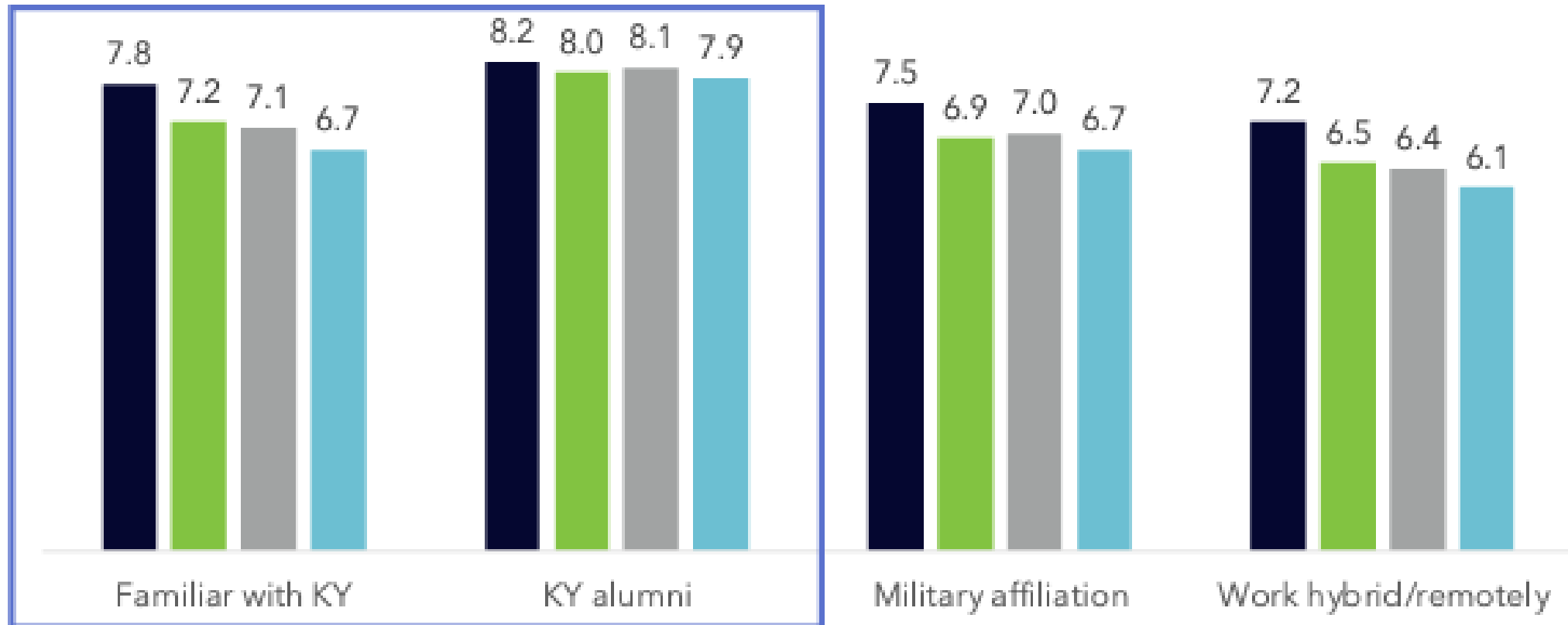
“Do they have cities in Kentucky?”
– California Resident

“I don’t know anything about this. I couldn’t name you the capital of Kentucky...where is Kentucky?”
– Texas Resident

EXTERNAL TALENT

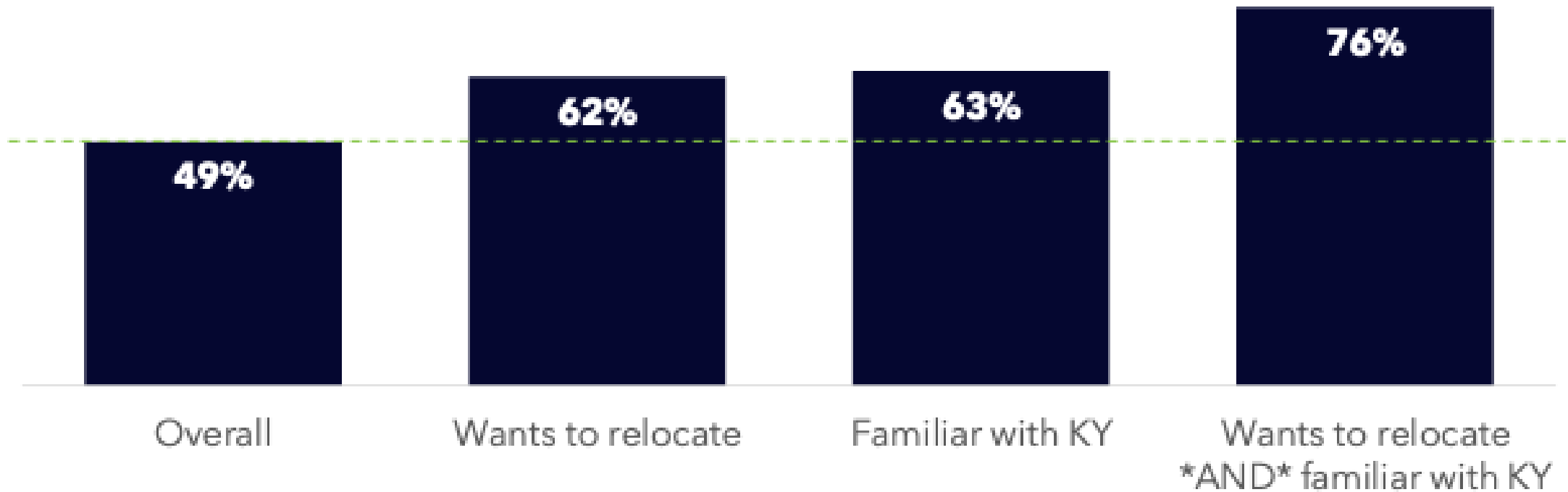
Perceptions of Kentucky **increase with familiarity and are particularly strong among alumni of Kentucky institutions.**

■ Visit ■ Live ■ Work ■ Advance your career



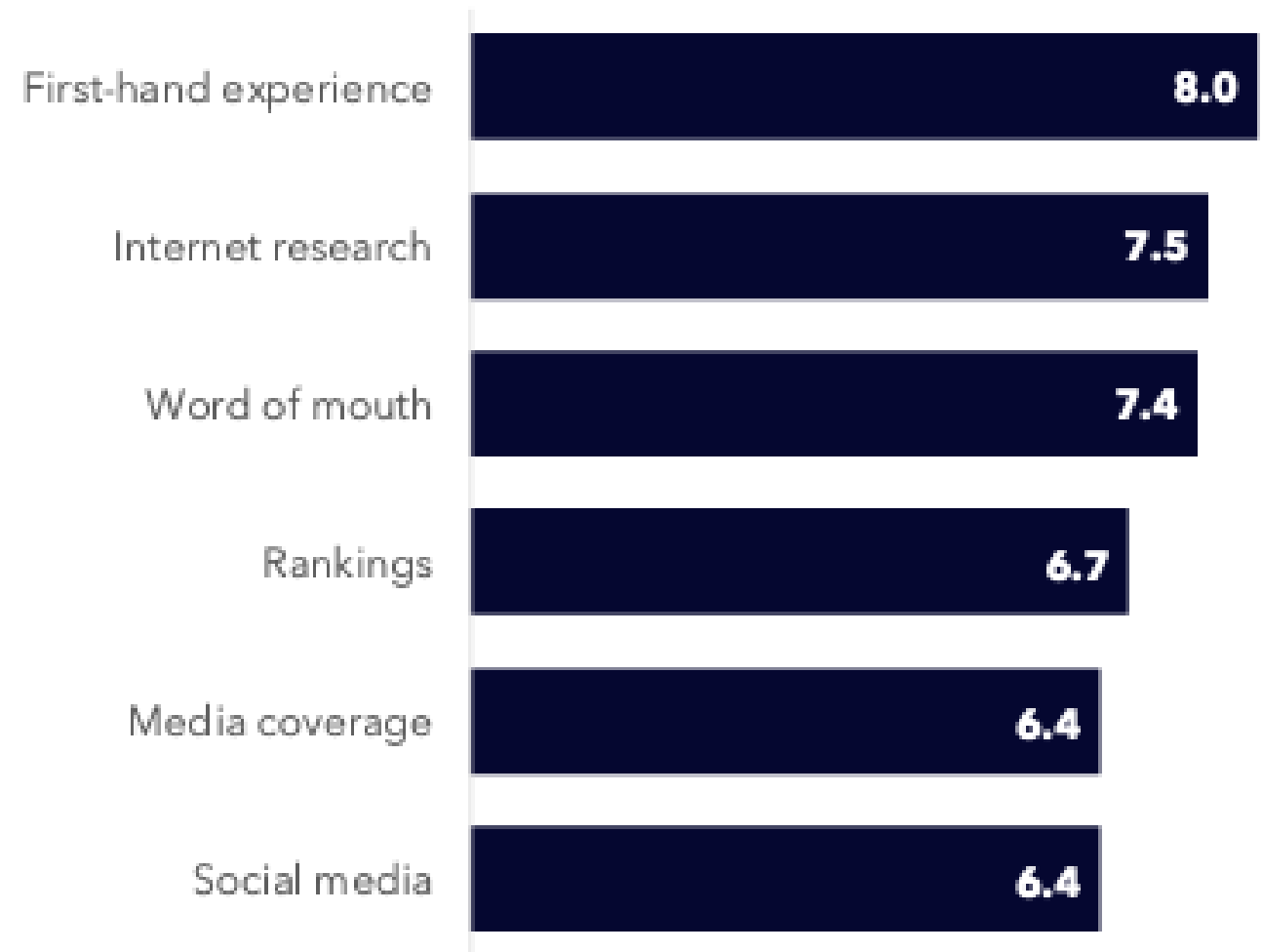
Q. Q. Based on your experience or general perceptions, how would you rate Kentucky as a place to...? (1=poor, 10=excellent)

Familiarity increases the **likelihood of considering a relocation** to Kentucky.



EXTERNAL TALENT

Talent's perceptions of an area are most influenced by **first-hand experience, internet research and word of mouth.**



Q. How influential are each of the following sources of information on your perceptions of an area? (1=not influential at all, 10=extremely influential)





stayforphilly

79 posts · 847 followers · 117 following

Want to Greater Philadelphia?

Come for the opportunities. Stay for a lifestyle you love.

Come for Philadelphia. #StayForPhilly

By @CharmPhilly partnership with @stayforphilly

or www.stayforphilly.com #1






stay for this



WE'RE RESEARCHING



breakthrough.



Best coffee shop in Greater Philly

— RANKING —

No. 3

MOST AFFORDABLE BIG CITY ON THE EAST COAST











WE'RE COST OF LIVING





COME FOR THE
BLOCK PARTIES.
STAY FOR THE
**Built in
Babysitters**

COME FOR THE CLASSICS. STAY FOR THE CULTURE.

StayforPhilly.com



COME FOR
LIFE SCIENCE JOBS.
STAY FOR
**Life
changing
Japanese
Food.**

COME FOR THE CLASSICS. STAY FOR THE CULTURE.

StayforPhilly.com

COME FOR THE CLASSICS.

Stay for the Culture.



Everyone agrees on that the Liberty Bell, Independence Hall, and the University City skyline are Greater Philadelphia. Don't get us wrong, you'll get all of that in this region — and in every city you visit. But as Philadelphians, we also thrive on what's day after today. Whether it's a top 50 list for food, Philly serves up everything from award-winning products to award-winning (and award-winning) food. Stay Philly is all about it. Stay Philly is all about it. Stay Philly is all about it.

Whether it's the historic streets of University City or the charm of Center City, you'll never be more than a short walk, an art gallery, or the great outdoors of Fairmount Park. Want to explore more? Whether it's a top 50 list for food, Philly serves up everything from award-winning products to award-winning (and award-winning) food. Stay Philly is all about it. Stay Philly is all about it. Stay Philly is all about it.

STAY FOR THE CULTURE



BUSINESS INSIDER

Why an entrepreneur has no regrets about moving from Hawaii back to her Kansas hometown

Business Insider | Nov. 15, 2023 | 4:03 PM EST



LOVE,
KANSAS

All That's Missing Is You

Ready for a fresh start? Kansas is here for you. The state has put in the effort and is now looking for hundreds of new and innovative entrepreneurs to bring their ideas from across the globe to the heart of the state. Living and working here offers so much more. Surround yourself with an amazing culture, recreation and convenience. Give it a try - you're going to love Kansas.

love KANSAS

04

For Kentucky, One Size Does Not Fit All.

Kentucky's 120 counties have dramatically different identities and assets. Regional, targeted messaging will outperform statewide generic campaigns.

Kentucky's Regions Are Distinctly Different - One Size Does Not Fit All

Each region has dramatically different assets, challenges, and cultural identities. While stakeholders recognize the need for an "umbrella" identity for Kentucky, they would like to see regionally tailored messaging rather than a monolithic state approach.

Northern Kentucky: "Urban amenities," "Cincinnati access,"
"Best of both worlds"

Eastern Kentucky: "Appalachian pride," "Healthcare hub,"
"Mountain culture"

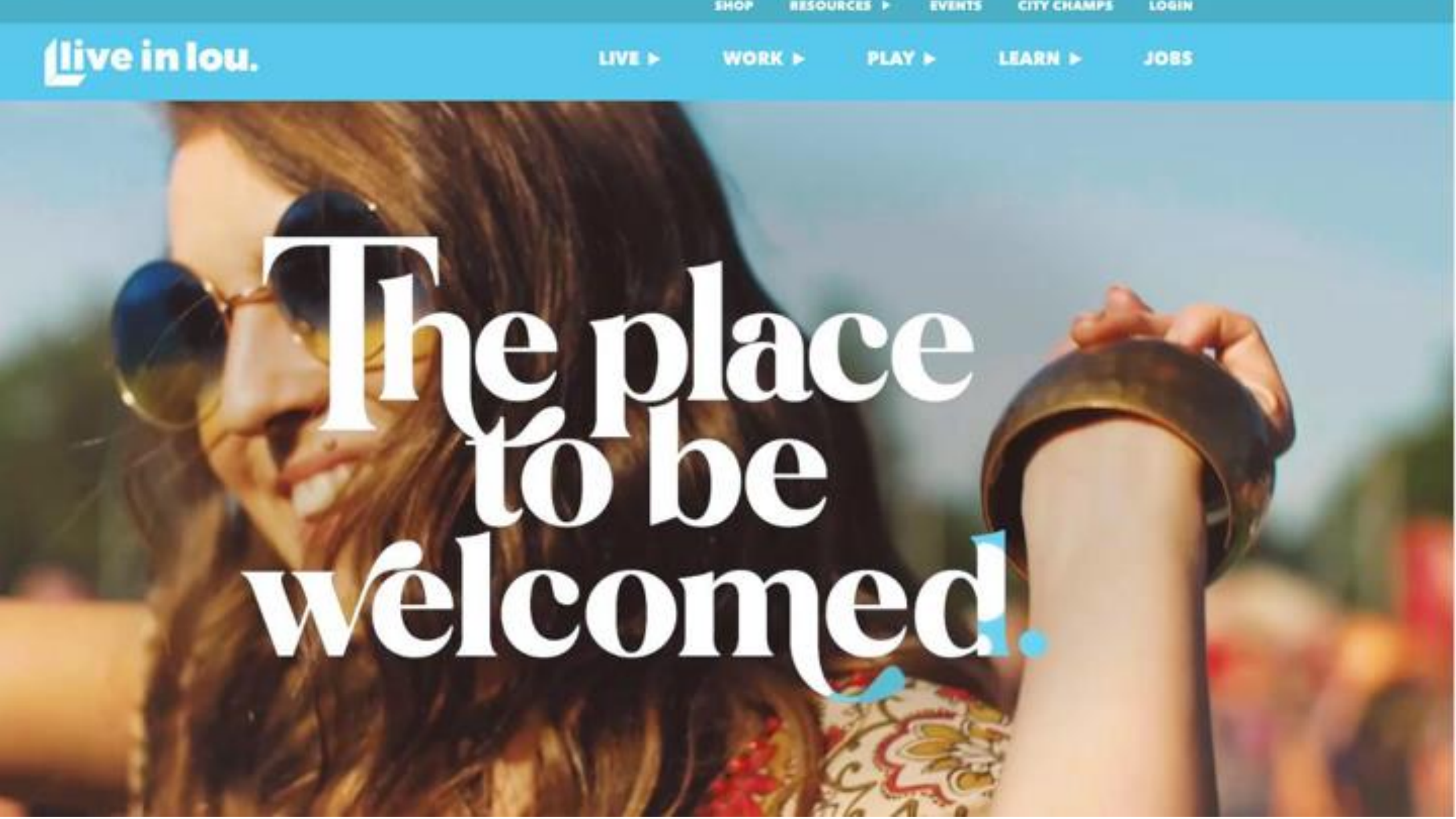
Western Kentucky: "River and energy industries," "Transportation crossroads" "arts heritage"

Louisville: "Progressive," "Urban sophistication," "Bourbon capital"

Lexington: "University town," "Innovation hub," "Horse capital"

South Central Kentucky:
"Diverse economy,"
"Nashville proximity,"
"Growth and opportunity"





The place
to be
welcomed!



EXPLORE FL'S REGIONS

From the Panhandle to the Keys, Florida's regions offer diverse landscapes and communities to explore. This section offers them all, and the wonderous things that.

SELECT REGION

- NORTH CENTRAL >
- NORTHEAST >
- NORTHWEST >
- ORLANDO-SPACE COAST >
- SOUTH CENTRAL >
- SOUTHEAST >
- SOUTHWEST >

VIEW REGIONAL MAP

WONDERFL

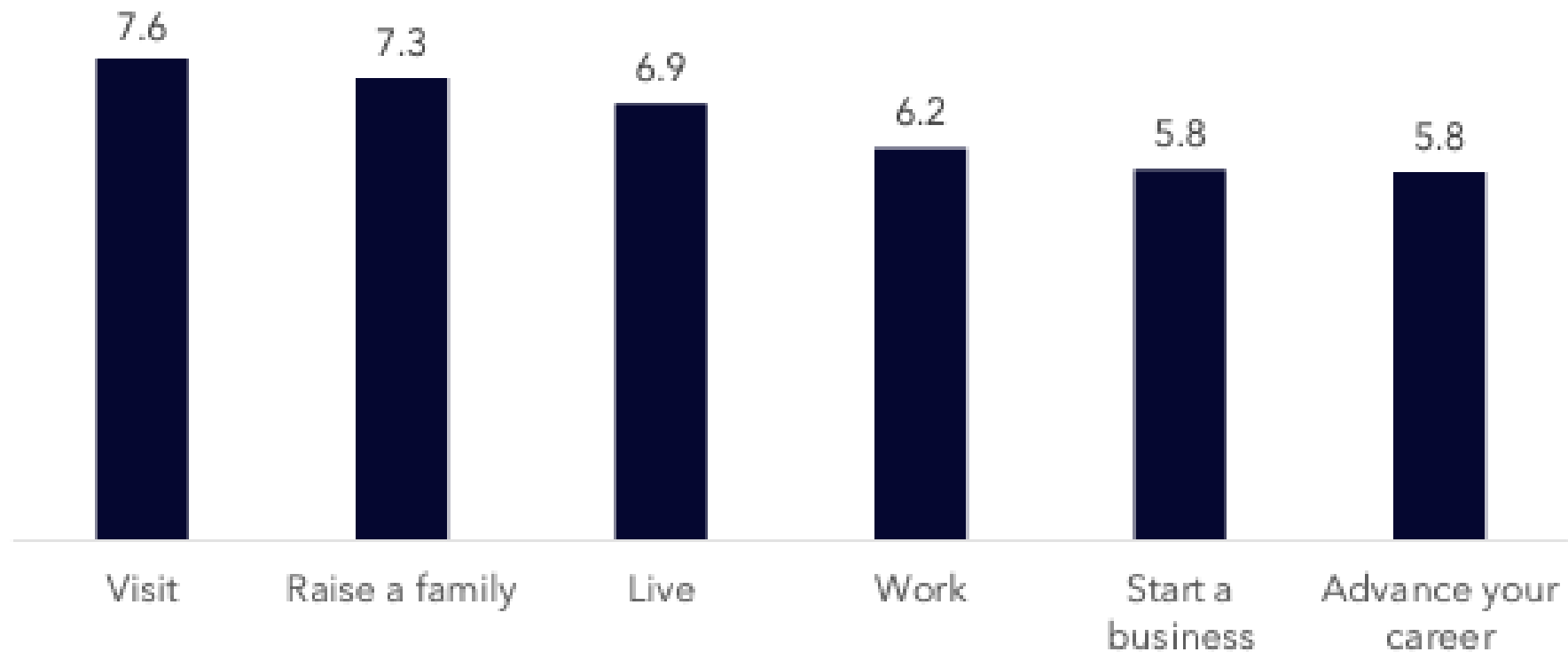


05

The Retention Crisis Is Real. Students Present an Opportunity.

47% of current residents want to leave citing limited opportunities. Meanwhile, 96% of college students would stay if offered jobs—but they doubt Kentucky's economy can support their careers.

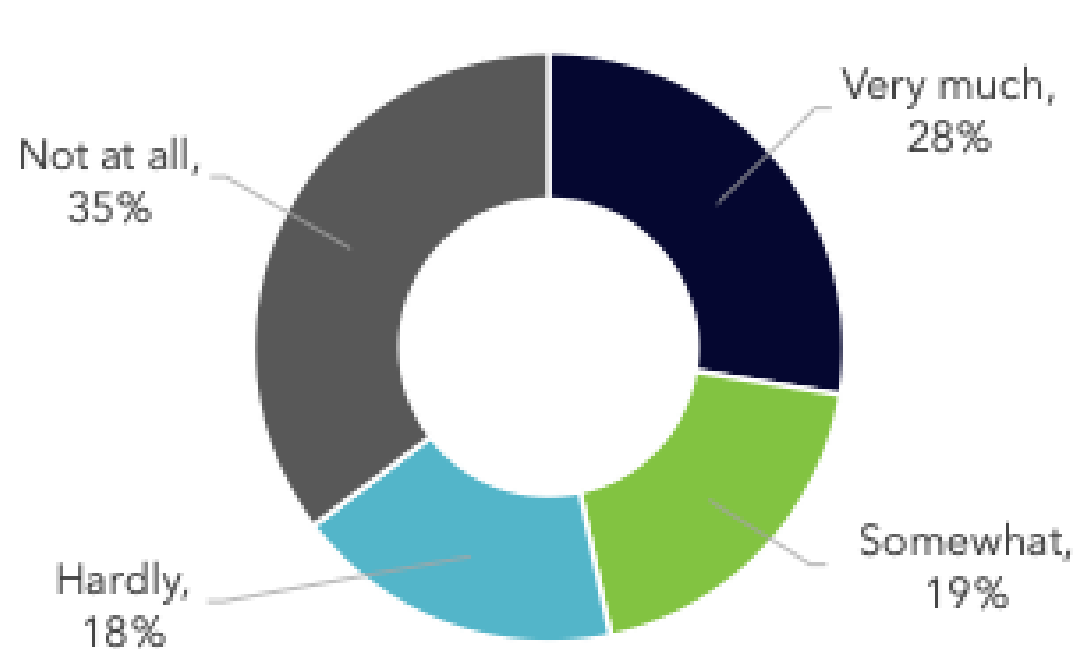
There are positive perceptions of Kentucky as a place to visit, live and raise a family, but career-related factors are less positively perceived.



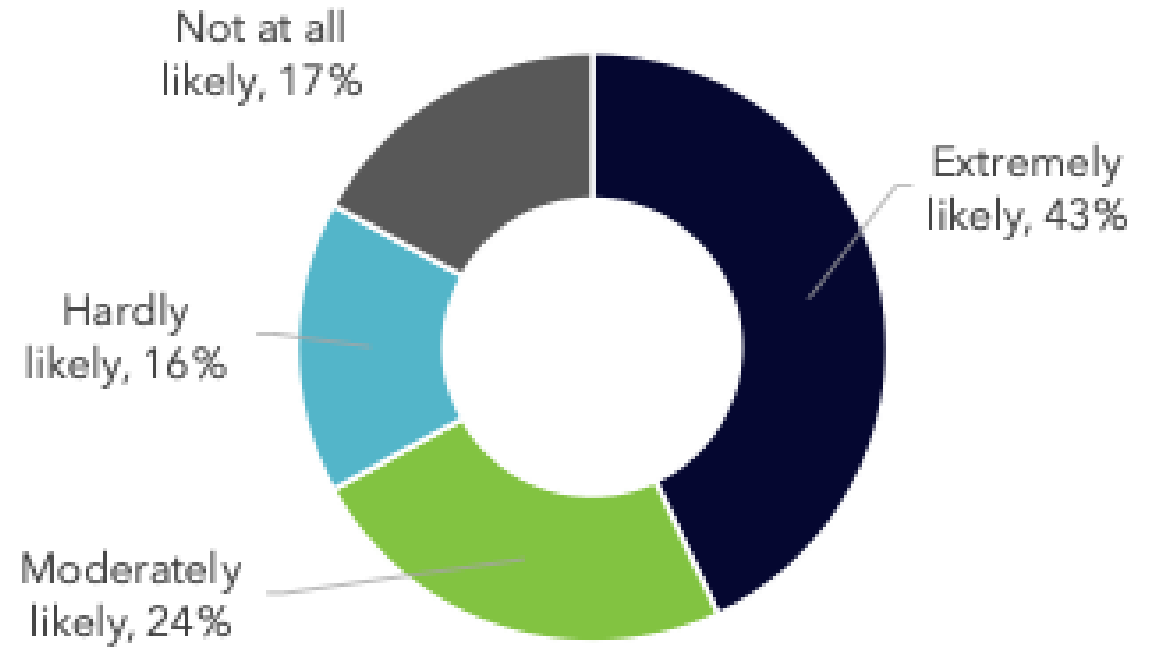
Q. Based on your experience or general perceptions, how would you rate Kentucky as a place to...? (1=poor, 10=excellent)

INTERNAL TALENT

47% of respondents want to move out of Kentucky and of those, 2 out of 3 feel it is likely they will move.

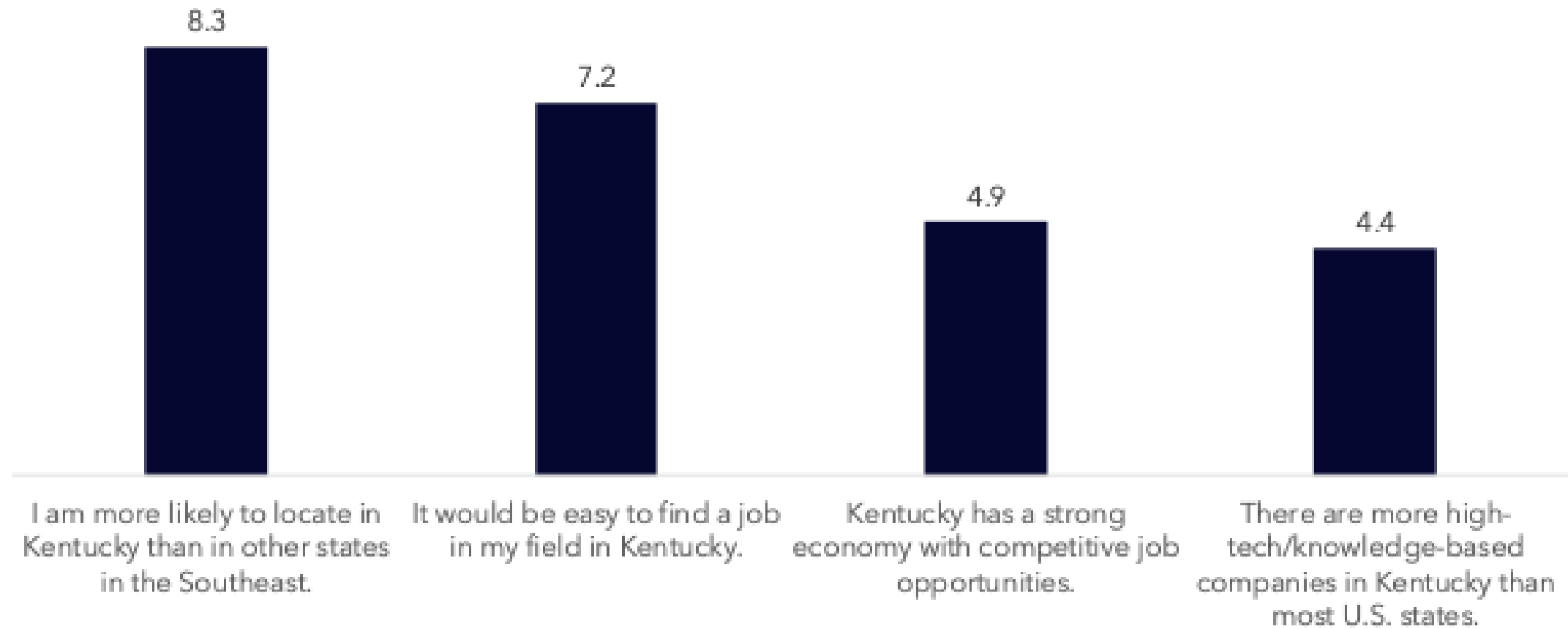


Q. On a scale from 1 (not at all) to 10 (very much), how much do you **want** to leave Kentucky and relocate somewhere else within the next two years?



Q. On a scale from 1 (not at all likely) to 10 (extremely likely), how **likely** is it that you will leave Kentucky and relocate somewhere else in the next two years?

Students want to stay in Kentucky but have concerns about the state's economic growth and competitiveness.

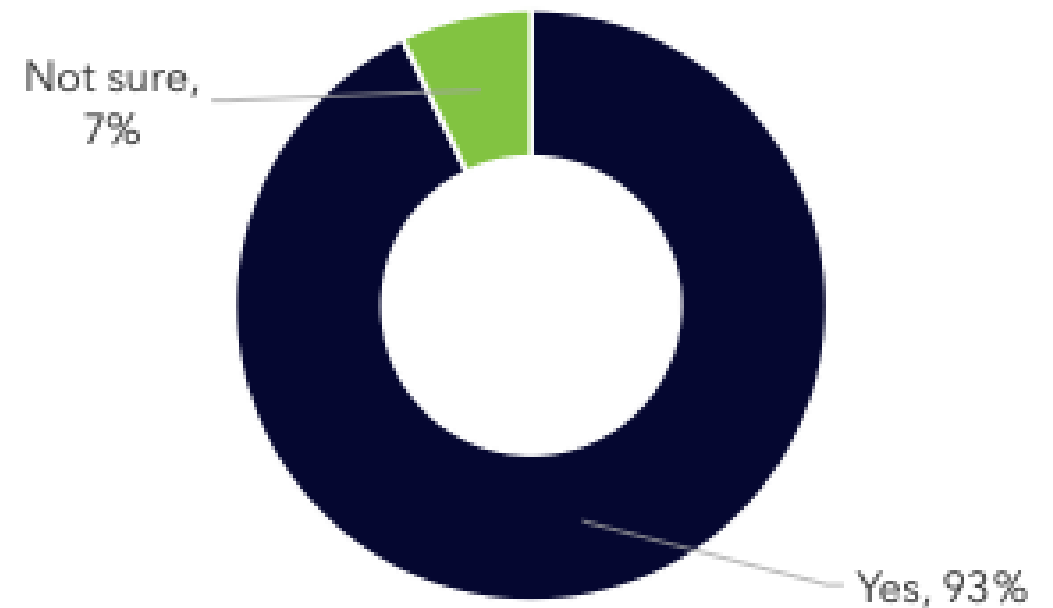


KENTUCKY STUDENTS

Job opportunities will influence where students choose to relocate following graduation.



Q. Following graduation, would you consider moving to a new location without a job opportunity lined up?



Q. Following graduation, if a job meeting your skill and salary requirements were offered to you in Kentucky, would you be willing to accept it?



Stakeholders Want Comprehensive State-Level Tools

Kentucky has strong foundational assets for talent attraction but needs strategic, regionally-tailored messaging and infrastructure improvements to compete effectively in today's talent marketplace.

Most-Wanted Talent Attraction Tools:

COMPELLING MARKETING MATERIALS

SUCCESS STORY & TESTIMONIAL LIBRARY

DATA & COMPARISON TOOLS

REGIONAL MESSAGING & COORDINATION

JOB OPPORTUNITIES & EMPLOYER CONNECTIONS

QUALITY OF LIFE INFORMATION RESOURCES

Summing it Up!

Summing it Up for Kentucky...

- 01 Embrace a Dedicated Talent Campaign Approach**
- 02 Lead with Kentucky's Winning Value Proposition**
- 03 Consider A Regional Approach**
- 04 Target Strategic Audiences**
- 05 Develop and Collaborate on Essential Marketing Tools**



Thank You!

