



Metro Detroit Tourism Brand: Preliminary Findings 0.1B

October 5, 2006

“The time has come to tell the world about the changes taking place in metro Detroit and to offer people in other regions and states a compelling story about Detroit that will encourage them to pay us a visit.”

James B. Nicholson, Chair, Tourism Economic Development Council

“The critical test for our tourism brand is, ‘Can you put any other place’s name on it? ‘ If the answer is no, then we have done a good job.

Patricia Mooradian, Chair, Tourism Economic Development Council Image TAG

“I don’t think we need to create something new. It’s about maximizing what we have — a certain authentic experience.”

Rick Sperling, Mosaic Community Theater

“Detroit is coming back to life, reborn as one of the most vibrant cities in the world.”

“Welcome to the Motor City”, *W*, September 2006

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Overview

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Overview

This document is a first look at findings and insights intended to serve as the basis for defining and developing the metro Detroit tourism brand.

It is a companion to the complete Metro Detroit Tourism Brand Findings Document currently being prepared for the Tourism Economic Development Council Image TAG and other key stakeholders.

This document is subject to revision incorporating their guidance and comment, at which time it will serve as the basis for developing the brand story and brand platform elements as detailed in the initiative's work plan.

Overview

Scope and Nature of Information Resources: This document builds on information and insight gathered from a variety of sources, including:

External Input

- a survey of target visitors to Detroit and Southeast Michigan commissioned by DMCVB. Some 1,340 visitors were surveyed.
- a series of focus groups conducted by DMCVB for the purposes of identifying local tourism product development opportunities for leisure visitors. Ten focus groups in five cities were conducted.
- extensive review of third-party materials as documented in the full-length, printed version of the findings report.

Overview

Scope and Nature of Information Resources: This document builds on information and insight gathered from a variety of sources, including:

Internal Input

- a series of four work sessions conducted in June 2006 with thought leaders representing a variety of metro area interests.
- site visits to locations representing all 5 TDDs, with on-site meetings with, and tours conducted by, local TDD representatives.
- a series of 12+ in-depth telephone interviews conducted with key stakeholders.
- a public survey of metro area residents generating approximately 400 responses.

Overview

Objectives: As defined by DMCVB, the present initiative is intended to:

- Develop a platform for clear, consistent and compelling communications with value that can inform a broad range of initiatives and extend beyond any one individual campaign.
- Provide a means for positively shaping tourist perceptions of Detroit over the long-term.
- Create a coherent, compelling story that brings together the suburbs and the city.
- Leverage positive momentum around Detroit tourism post- Super Bowl XL.

Overview

Project Timetable

Late July: web launch, survey administration

Early-Mid August: survey results

Late August: draft findings

Early-Mid September: revised findings

Early-Mid October: draft brand story, platform

Late October: revised brand story, platform

Early-Mid November: validation

Mid-Late November: approval

4Q06/1Q07: New promotional campaign development

2Q07: Campaign launch

Key Findings

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Key Findings: State of the Metro Area

The metro Detroit tourism brand comes at a time when billions have been invested in downtown Detroit, and when a number of significant new developments are slated for imminent completion.

Since the late 1990s, investment in the city has topped \$15 billion: It is a very active metro area terms of attracting new or expanded facilities.

Major recent development projects with a significant actual or potential tourism impact include two new stadiums, the major expansion of three casinos, the transformation of the Detroit International Riverfront, and the 2004 completion of downtown Detroit's Campus Martius Park, envisioned as a centerpiece of the city's downtown revitalization.

Stakeholders and visitors alike comment that the changes under way are significant, visible, and highly encouraging.

Key Findings: State of the Metro Area

The present tourism initiative follows on the heels of a highly successful effort hosting Super Bowl XL, which shed much favorable attention on the city and the surrounding area.

Held on February 5, 2006 in Detroit's Ford Field, the event was one of the most widely watched Super Bowls ever.

Led by Roger Penske, the Detroit Metro Host Committee spent approximately \$18 million to support the event.

Detroit targeted a number of significant renovation and demolition efforts to present a revitalizing downtown to the world.

Detroit earned warm praise and high marks from all quarters for the appearance of its downtown, its hospitality, and its handling of event logistics.

A dedicated public information campaign, "The World is Coming — Get in the Game," reached out to involve and motivate local Detroiters.

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Key Findings: State of the Metro Area

Stakeholders view the City of Detroit and its nearby suburbs as a study in contrasts.

The city of Detroit is 85% black; key surrounding suburbs are 80+% white.

The city of Detroit is losing population; the suburbs are gaining population.

Crime rates in the city are among the nation's highest; crime rates in some suburban communities are among the nation's lowest.

Unemployment is high in a city with limited funds to maintain basic services; neighboring Oakland County is one of the wealthiest in the nation.

“The old push-pull between the suburbs and the city: I don't think it's going to get fixed. It's sort of a moot point. Agreeing on a starting point is the biggest thing.”

Takeaway: Such facts point to serious challenges faced in creating a unified tourism brand.

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Key Findings: State of the Metro Area

Despite perceived contrasts as well as local biases and priorities, stakeholders acknowledge the need to create a unified tourism brand platform.

When asked to describe an ideal “three days in Detroit”, even when not prompted to try to include attractions from the city and suburbs, stakeholders have an inherent tendency to include attractions and destinations from throughout the metro area.

In themselves, individual pockets of tourism attractions — including Detroit — are likely to represent something of an “incomplete experience” for most leisure visitors.

“It’s the differences that make us attractive.”

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Key Findings: State of Metro Detroit Tourism

In recent years, leisure tourist visitation to metro Detroit has been relatively flat.

Between 2000 and 2004, total room nights sold has trended down somewhat, with 7.2mm room nights sold in 2004 vs. a peak of 8mm in 2000.

While 2004 occupancy rates were off nearly 10% of their high of 67% in 2000, they were 3.5% higher than in 2003.

It is expected that metro area tourism numbers for 2005 and 2006 will show a recovery, aided in part by ongoing downtown redevelopment and by Detroit's hosting of Super Bowl XL.

Over the past three years, total employment within the metro area tourist industry has been relatively flat in lodging and has expanded slightly in eating and drinking establishments and in the Detroit casinos.

Key Findings: State of Metro Detroit Tourism

While not regarded as a major tourist destination, tourism is in fact the second largest segment of the regional economy, behind only automobiles.

Metro Detroit currently enjoys significant family- and business-related tourism, including conference-related tourism.

The metro area is a major destination for certain specialized segments of the tourist population: for example, African Americans celebrating family reunions, and Arab Americans generally.

Detroit also enjoys significant short-stay visitation from Canadian tourists, many of whom are attracted by regional shopping opportunities.

A bright spot in area tourism, three area casinos have captured some \$360mm in annual visitor spending from total revenues of almost \$1.2 billion.

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Key Findings: State of Metro Detroit Tourism

The metro Detroit tourism brand initiative comes at a time when the State of Michigan has launched its own tourism and economic brand initiatives.

Created by the state's Travel Michigan agency, "Pure Michigan" launched in 2006 with ads running in Wisconsin, Ohio and Ontario.

Travel Michigan encourages the state's various Destination Marketing Organizations (DMOs) to use the Pure Michigan logo and brand positioning as a component of their overall marketing programs.

Takeaway: Positioning scenarios for the metro Detroit initiative will be reviewed in light of Pure Michigan. We will provide specific suggestions as to how the two initiatives can ultimately inform each other.

Key Findings: State of Metro Detroit Tourism

The state tourism brand's positioning and personality are different from those that metro Detroit is likely to adopt.

The state's Pure Michigan initiative includes images of Detroit as well as small-town and outdoor scenic beauty.

Pure Michigan is built on three core ideas.

- "Michigan is an authentic destination."
- "Michigan has got a perfect world in its own backyard."
- "Michigan offers a pure and uncompromised environment in an overdeveloped ovworld."

Takeaway: Pure Michigan is designed to include Detroit, not focus on Detroit. Rather than look for ways to make the State's effort "more about Detroit", one key to success might be to explore how the two campaigns, running independently, can complement each other.

Key Findings: State of Metro Detroit Tourism

The TEDC has established five Tourism Destination Districts (TDDs) throughout the metro area to help ensure a balanced, broad-based and optimal development of the local tourism offering.

In late 2005, TEDC announced that it would “keep the momentum of Super Bowl going” by working with communities across metro Detroit to develop TDDs.

Five TDDs have been formed to date: Detroit, Dearborn, Southern Oakland County, Northern Oakland County, and Macomb County.

Representatives from all five TDDs have participated in work sessions and interviews that have informed the metro Detroit tourism brand initiative.

Key Findings: Issues and Challenges

Despite positive coverage surrounding the Super Bowl, Detroit tourism remains hampered by a pervasive, long-standing negative portrayal in the media.

This is stating the obvious. What's valuable is knowing that, while stakeholders see the basis for the negative portrayal in past events (and, to a lesser extent in present challenges such as the continued troubles of the auto industry), they concur that the image is inaccurate and out-of-date.

Key Findings: Issues and Challenges

Crime| Perception: “Detroit is dangerous and crime-ridden.”

Examples Cited: Movies such as “Robocop”; hip-hop lyrics that extol violence; Detroit’s generally poor performance in various yearly crime rankings.

Reality: As shown by a significant study, in downtown Detroit — the area where a visitor is likeliest to be — the probability of becoming a victim of serious crime is significantly lower than elsewhere in Michigan or the United States. Very low crime rates in the suburbs.

Message: “People are surprised by how safe they feel when visiting Detroit. But they shouldn’t be. In the places you’re likely to visit, Detroit is every bit as safe as — if not safer than — most other American cities.”

“I think the perception of crime is overrated and blown out of proportion. I don’t have any problem going down to the city from the suburbs.”

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Key Findings: Issues and Challenges

Race Relations| Perception: “Detroit is a city beset by racial tension.”

Examples Cited: Articles and encyclopedia entries citing that “Detroit has never fully recovered from the after-effects of the [12th Street] riot and the negative media coverage that was conveyed internationally.” [Wikipedia] Ongoing news items [eg. Detroit zoo]

Reality: While race relations remain an issue of ongoing importance, key stakeholders note a trend towards visible, positive change. Young people do not seem to share the negative perceptions of older generations. Success of ongoing efforts by organizations such as New Detroit.

Message: “In Detroit, you are likely to meet lots of people — black, white and brown. They will all make you feel welcome. The city has a strong African American heritage and growing ethnic diversity. Enjoy it!”

“We will never fully be the world-class community that we can be until we can fully address our racial issues.”

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Key Findings: Issues and Challenges

Economy| Perception: “Detroit is another industrial has-been.”

Examples Cited: Numerous examples from the mainstream media that disparage or decry Detroit as a city literally in ruins.

Reality: A significant number of the architectural gems are being restored. Despite current economic woes, the area remains the powerful center of the automotive and related industries. The economic base is diversifying; attempts to attract new industry are meeting with early success.

Message: “Insiders know the real story. This is a place with a *lot* going on. More than most places. Has-been? Where have you been?”

“There are a heck of a lot of people at GM and Ford who think tomorrow is a better day. The situation today is because of things that happened two, three, four, five years ago. There are plenty of new thoughts and new plans, but it takes time to see them come to light. In this industry, turnaround is not quick.”

Key Findings: Issues and Challenges

Several stakeholders cited low self-esteem and a negative self-image as one of the key barriers to the success of any local tourism effort.

While fond of their city, stakeholders report feeling pessimistic or cynical about its prospects.

Frequently heard phrase: “We beat ourselves up.”

Some see this pessimism also rooted in “a desire to be like other cities.”

Some also believe the city and local media do not provide enough “positive spin” on what’s going on.

“We have an inferiority complex. Somehow we don’t think we are good enough.”

Takeaway: We may need to account for this image in presenting brand scenarios. There is a risk that Detroiters do not feel confident enough to “own” a story that tourists might find perfectly valid and compelling.

Key Findings: Issues and Challenges

Image issues aside, metro Detroit tourism must also acknowledge a number of practical constraints — constraints of geography, access and information.

A Geographically Dispersed Offering:

Stakeholders note that, not only is metro Detroit spread out, but that in many places there are long “empty” stretches (from a tourist standpoint) between destinations.

Stakeholders also note that downtown Detroit can also feel “spotty” — with its activity limited to certain areas or pockets.

This impression can extend to individual neighborhoods or even blocks.

Takeaway: Maps and wayfinding tools have an important role to play in shortening the “mental distances” between destinations.

Key Findings: Issues and Challenges

Image issues aside, metro Detroit tourism must also acknowledge a number of practical constraints — constraints of geography, access and information.

Access: Lack of a Public Transportation Infrastructure:

Stakeholders concur that the metro area lacks significant public transportation and, therefore, the only realistic way to get around is to drive or be driven.

There is a significant outside perception that Detroit is not only highly auto-centric but also hard to get around:

“If roads and highways were the keys to success, Detroit would be Paris.”

Key Findings: Issues and Challenges

Image issues aside, metro Detroit tourism must also acknowledge a number of practical constraints — constraints of geography, access and information.

Information: “The Hidden City”

For the non-resident, stakeholders believe, many of Detroit’s tourist offerings are neither easy to locate, easy to identify, or well-promoted.

Most advised talking to an insider or good advance planning to help ensure an enjoyable stay.

“I’d say, if you love jazz, you can find it here — you just have to look hard. If you want electronic music, I wouldn’t know where to send you, but I know it’s here. You’ll just have to look hard.”

Key Findings: Assets & Opportunities

Reflecting its African American majority population, the City of Detroit has an incredibly rich African American culture, history and heritage.

The African American presence in Detroit is decisive and long-standing, from the time of the freedom railroads through the rise of the auto industry and into the present.

Metro Detroit is home to many important African American social organizations and cultural institutions, including the largest African American history museum in the United States.

From reunion sites to landmark churches and more, Metro Detroit offers a wide range of destinations and attractions of specific interest to African American visitors.

“We need to capitalize on the fact that we have such a large African American population. We need to capitalize on these things. And while we are the most segregated community in the US, we are much more diverse than we were 10 years ago. We need to talk about it and not run away from it.”

Takeaway: From a positioning standpoint, Detroit’s African American heritage is a significant differentiator.

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Key Findings: Assets & Opportunities

Metro Detroit is also home to the largest and most dynamic Arab American community in the United States.

From population to politics to culture, metro Detroit is “the center of Arab America”.

Metro Detroit is a major tourist hub not only for other Arab Americans but also from Arabs visiting the United States from other countries.

Suggesting the community’s tourist potential, its weekend-long Arab Festival in June annually draws approximately 300k people, including many from outside the region.

Takeaway: From a positioning standpoint, Detroit’s Arab American heritage is a significant differentiator.

Key Findings: Assets & Opportunities

Metro Detroit's many distinct ethnic identities can and should play a role in the tourism offering.

Stakeholders note that metro Detroit possesses many distinct ethnic communities, including a large Armenian community and an emerging "Bangla Town".

While these communities add to the vibrancy of the area, many lack a well-defined neighborhood center.

Takeaway: Detroit's ethnic identities should be factored into its tourism brand personality.

Key Findings: Assets & Opportunities

Stakeholders note that Detroit excels at festivals and events.

Work session participants and interviewees expressed that Detroit's events have widespread appeal and are a major tourist draw.

Featuring many events that are unique to Detroit — or at least categorically superior here [Dream Cruise, Concert of Colors, Arab American Festival, Techno Fest, etc.], stakeholders view Detroit's summer events offering as a competitive differentiator.

One stakeholder cited increasing city fees and a limited number of downtown hotel rooms as limiting factors.

Stakeholders feel that while individual events may be well-promoted, the city does not do enough to package the offering.

Takeaway: In addition to their appeal, Detroit's events strength can strongly support an image of a vibrant, fun-loving city with broad-based appeal — and considerable youth appeal.

Key Findings: Assets & Opportunities

Stakeholders cite the Dream Cruise as a quintessential metro Detroit event.

Some stakeholders view the event, the largest of the summer, as potentially equivalent to New Orleans's Mardi Gras.

[Note, however, that survey respondents ranked it only #24 of 25 top "must see" experiences.]

Held along 16-miles of Woodward Avenue, the Dream Cruise involves communities in two of metro Detroit's five designated TDDs.

Current marketing of the event, and rights to the name, are closely held.

Takeaway: Assuming local marketing authorities and municipalities can reach agreement, there is a clear opportunity to position the event to a larger audience, and as a more central component of the overall tourism offering.

Key Findings: Assets & Opportunities

Detroit has a rich food offering in terms of traditional and ethnic fare; in terms of high-end fine dining, its offerings do not stand out.

Stakeholders generally expressed the view that “the whole idea of food” is important to Detroiters.

Eastern Market is highly regarded as a top tourist destination as well as a hub of the city’s strong food traditions.

Survey respondents cited Slow’s Barbecue as a favorite personal dining choice and place to take visitors.

While noting that metro Detroit has no shortage of fine dining choices, stakeholders do not view local fine dining options as differentiating.

“As far as food goes, we’re okay but not great. There’s an expectation that you eat well in New York and Chicago. Here, you get something quick.”

Takeaway: Detroit’s food strengths may play better to certain tourism segments than others. They also shed light on the tourism brand personality, reinforcing characterizations of the city as “vibrant” and “real”.

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Key Findings: Assets & Opportunities

Detroit's rich sports offerings draw people from throughout the region.

Stakeholders consistently characterize Detroit as “a big sports town”.

Opening day of the Detroit Tigers' baseball season is cited as one of the city's defining annual events.

Seeing a Tigers, Red Wings and Pistons event are all cited as among the 10 most popular “must see” Detroit experiences. (#4, #7 and #10, respectively)

Takeaway: In addition to being a key asset, Detroit's “fan strength” may provide insight into the tourism brand's overall personality. Additionally, the strength of the city's sports offering relates to the city's perceived strength as a festival and event destination more generally.

Key Findings: Assets & Opportunities

Detroiters of all kinds cite the city's musical heritage as being something that truly sets it apart.

There is, of course, Motown, which in itself draws on a strong existing gospel and popular music tradition. There is techno. There is hip-hop. There is rock 'n roll. There is jazz. There are the classical performances of the DSO and the Detroit Opera House. Detroit's ongoing contribution to the American music scene cannot be underestimated, as any list of popular American musical artists confirms.

For the leisure tourist (especially one willing to look at little), Detroit's music is alive and well, and ready to be experienced — at festivals, at concert halls and theaters throughout metro Detroit, and at a large number of clubs — both underground and legendary.

Takeaway: Detroit music is a key differentiator and a powerful tourism draw. In factoring it into the tourism brand, it will be important to link Detroit's musical heritage with its current musical offering. For one, many stakeholders observed that while Motown is the city's iconic contribution to the music scene, the tourist's options for experiencing Motown music are limited. For this reason (and others), it might make sense to use Motown as the anchor for a larger story of Detroit as a city of music.

Key Findings: Assets & Opportunities

Stakeholders note that Detroit lacks the “big attractions” such as aquariums or theme parks that are major tourist draws in other cities.

Stakeholders consistently give the Detroit Zoo high marks; however, they did not rank it as a particularly important tourism destination for non-local visitors.

Stakeholders regularly cite The Henry Ford as a primary, “must visit” destination but do not appear to view it as an experience comparable to an aquarium or theme park visit. It remains strongly associated with automotive history.

“We’ve got a really wonderful zoo, but we don’t have the great aquarium on Belle Isle, we don’t have a big amusement park that’s nationally ranked, and we don’t have a boardwalk or lots of bars like Venice Beach. There’s not one big attraction; there’s a bunch of things.”

Takeaway: Confirming earlier survey work, these findings suggest metro Detroit’s strongest tourism appeal may be to segments who are not looking for this type of product.

Key Findings: Assets & Opportunities

Metro Detroit has a strong representation of cultural institutions.

Metro Detroit's tourism offerings include a large number of cultural attractions, affording a great deal of diversity. Four of the area's Top 10 draws, as noted by survey respondents, could be classed as cultural attractions: Detroit Institute of Arts (#1), The Henry Ford (#2), Detroit Zoo (#8) and Motown Historical Museum (#10).

Of 26 sites that 50% or more of survey respondents cited as either "must see" or "good to see", several more indicate the strength of the cultural offering: the Detroit Symphony Orchestra (#8), The New Detroit Science Center (#10), Detroit Historical Museum (#11), Detroit Opera House (#12), Pewabic Pottery (#18), Charles H Wright Museum (#19), Henry Ford Estate (#20), Cranbrook Art Museum (#22), Cranbrook Institute of Science (#23), Cranbrook House Gardens (#25) and Edsel & Eleanor Ford House (#26).

Key Findings: Assets & Opportunities

Metro Detroit has many strengths as a center of architecture and design.

Survey respondents cited the DIA and The Henry Ford, both with strong architecture and design linkages, as the #1 and 2 top “must see” sites respectively.

Many other design-related destinations (Cranbrook, Pewabic, etc.) were also cited.

Stakeholders strongly emphasized metro Detroit’s architectural heritage as a major asset.

Stakeholders see meaningful design linkages to the area’s automotive industry.

“One mile square, roughly. Traversed on foot in half an hour, or glimpsed by a commuting motorist in about 40 seconds. Acre for acre and pound for pound, the constellation of architecture and urban space within this tiny piece of real estate is among the richest and most diverse on earth.”

Takeaway: To attract a broader and potentially younger tourist base, it may be important not to position Detroit architecture and design as “heritage” but as dynamic forces at work within the area today.

Key Findings: Assets & Opportunities

Automobiles are one of the defining characteristics of metro Detroit — and the basis for many tourism experiences and attractions.

Metro Detroit's tourist offering includes a large number of automotive history-related sites; however, only one, The Henry Ford, ranks as a "must see" destination.

Stakeholders and visitors are highly enthusiastic about the Ford Rouge Factory Tour at The Henry Ford as a compelling new destination.

For tourists, Detroit's appeal as an automotive offering is strongly tied to events, including the Woodward Dream Cruise, the Concours d'Elegance, auto shows and other cruises.

Takeaway: While highly differentiating, with the exception of The Henry Ford, Detroit's auto heritage offerings are not its top draws. This tentatively suggests either that current destinations might not be paying off Detroit's top of mind association with the automobile, or that automobile-related destinations, as presently construed, have a relatively limited tourism appeal. Both hypotheses could be tested further.

Key Findings: Assets & Opportunities

Stakeholders cite Birmingham, Rochester and Troy as offering the area's best shopping, dining and spa experiences.

Many stakeholders expressed the view that downtown Detroit lacks strong shopping appeal.

Survey respondents (42%) cited The Somerset Collection as the top tourist destination in Northern Oakland County.

Birmingham was cited as a primary destination for high-end, boutique-type shopping.

In work sessions, stakeholders allocated one afternoon for shopping in Oakland County as part of a sample three-day Detroit itinerary.

Takeaway: Metro Detroit has a meaningful, if not standout, tourism offering around shopping. Shopping is an essential contribution made by Northern Oakland County to the area's total tourism offering.

Key Findings: Assets & Opportunities

Stakeholders were mixed about the role the casinos should play in the city's tourism promotions.

Detroit's three casinos are a major source of revenue. With major expansion under way, casinos' marketing emphasis is likely to shift from local to regional.

Some welcome the casinos' presence and see their potential to support increased appeal to a younger target visitor.

Some express concern that the casinos represent a "closed system" that does not encourage visitors to explore other offerings.

Currently, casinos do not factor into residents' consideration as important leisure tourist destinations.

Takeaway: Current level of dialog between casino marketing and local tourism authority is limited. Casino expansion may create an opportunity for further dialog as casinos look to differentiate their offering regionally. More data is needed regarding tourist visitation to casinos.

Key Findings: Assets & Opportunities

A number of stakeholders pointed out that, as a tourism destination, Detroit must sometimes compete with the allure of the rest of Michigan.

Michigan's "up North" is a major draw for regional tourists.

A number of stakeholders expressed a desire to position Detroit as more of a stopover destination.

A few stakeholders see the potential of leveraging the "allure of the north" in reverse: Offering a "mini-Michigan experience of lakes, cottages and woods (centered in Oakland County) to visitors whose primary destination is Detroit.

Takeaway: Stakeholders will need to consider how important the "stopover opportunity" is with regard to the overall metro Detroit tourism positioning and target demographic.

Key Findings: Assets & Opportunities

Stakeholders cite leveraging Detroit's waterfront location as a major opportunity.

Some note that other cities, including those with “a lot less to work with” than Detroit, have significantly strengthened their tourist appeal by orienting attractions and events around their waterfronts. [Examples cited: Baltimore, San Antonio, Louisville]

The Riverfront development effort is viewed as a key stimulus.

In some locations, public access may be an issue.

Additional product and experience development are needed to fully leverage this opportunity.

Takeaway: Overall, (with the modest exception of Belle Isle), Detroit's river- and lakefront offerings are not viewed as a significant tourism draw. However, Lake St. Clair and the Nautical Mile are viewed as the primary tourism draw for the Macomb TDD.

Key Findings: Assets & Opportunities

Stakeholders cite Detroit's proximity to Canada as an important differentiator.

In work sessions, stakeholders saw a quick visit to Windsor as an important activity to include in a sample three-day itinerary.

Beyond the intrinsic interest of “visiting Canada”, Windsor was seen as having little of real visitor interest beyond “restaurants and nightclubs”.

Survey respondents did not cite a visit to Windsor as an important activity. [Alternately, it is possible they do not view Windsor as a metro Detroit destination, and therefore refrained from commenting.]

Takeaway: Windsor's potential role in the overall tourism brand story would appear to be minor.

This document highlights a few of the top-of-mind tourism brand assets of select TDDs.

Focus of inquiry has been on leisure visitors arriving to Detroit by car for an overnight+ stay within the metro area from destinations within a 300-mile radius.

“Top-of-mind” TDDs suggest most interesting opportunities from the standpoint of telling a consistent, unified “all-metro” brand story. They are not meant to suggest other brand-building opportunities of local importance, or to other visitor segments.

A more complete inventory of “identified destinations and activities” will be available for review in the full-length print companion to this presentation.

Key Findings: Assets & Opportunities: TDDs: Dearborn

Beginning with The Henry Ford, Dearborn plays a central role in attracting people from out of town to metro Detroit.

Dearborn ranks either second or third (behind Detroit and possibly Ann Arbor as a regional draw).

Ford past and present has a huge presence in Dearborn, the long-time home of the Ford Motor Company.

Dearborn's tourism offering begins with The Henry Ford, billed as "America's Largest History Attraction". It is metro Detroit's single biggest tourism draw.

The city's Arab American community, recently enhanced by the addition of the country's first-ever Arab American museum, has been identified as an asset with further tourist development potential.

Aside from these two key assets, local stakeholders do not consider Dearborn to have "much depth" in the way of a significant regional leisure tourist offering.

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From individual destinations to distinct tourism hubs, Oakland County is positioned to make a number of strong contributions to the overall Detroit tourism experience.

Home to some 1.2 million people and 61 communities, Oakland County is the third wealthiest county in the nation. It is noted for its high quality of life.

Two TDDs are situated within Oakland County: Lower Oakland County, which includes the communities of Ferndale, Royal Oak and Birmingham; and Upper Oakland County, which includes the communities of Rochester, Troy and Bloomfield Hills.

In developing sample itineraries for “three perfect days in metro Detroit”, stakeholders allocated at least one full day to offerings in Oakland County — in particular for “great restaurants and shopping and spas”.

Birmingham, in particular, is cited by some as a second, emerging tourism hub.

Macomb County's primary appeal to an out-of-town leisure visitor may be linked to its frontage on Lake St. Clair.

Macomb County is considerably more rural in character than Oakland County and possesses fewer large towns. That said, the character of the county is changing quickly: It is a growing and prosperous area with a fast-growing retail and business corridor along M-59.

While highly motivated to develop tourism potential, County officials and other stakeholders acknowledge that Macomb has relatively little to offer the out-of-town leisure tourist at present. The county's primary tourism development focus currently lies elsewhere.

Stakeholders see three opportunities for leisure tourism development: Lake St. Clair, The Nautical Mile, and downtown Mt. Clemens, in that order of potential.

"There's not a lot of reason to come to Macomb County for tourism reasons now, but when people are here in the Detroit area, there are lots of events and activities that could take place here."

Key Findings: Assets & Opportunities: Audience

A recent survey and research report suggests that metro Detroit's best leisure tourism development opportunity might reside in targeting a young adult visitor.

Many stakeholders supported this view.

Survey findings suggest that Detroit's most competitive offerings are those that might best appeal to a younger visitor: casinos, music, clubs, nightlife — and less so to a family visitor.

Most other cities in the region have assets that are more broadly appealing to a family visitor or older visitor.

Other data indicates that younger visitors may have significant disposable income and willingness to spend. Many focus group respondents confirmed this generalization.

***Note:** Survey findings cited here may be reviewed in the Strategic Marketing & Research, Inc. document "Tourism Economic Development Council: Research Topline" of April 2006.*

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Key Findings: Assets & Opportunities: Audience

Some stakeholders have suggested that a targeted outreach to African Americans represents a compelling leisure tourism development opportunity for metro Detroit.

Stakeholders cited Detroit's rich African American offerings as one of the destinations most important and distinctive assets.

African American stakeholders, in particular, felt the city has not done enough to market tourism to African American leisure visitors.

Stakeholders expressed the belief that simply focusing on the African American market alone could significantly boost metro Detroit's tourism numbers.

Key Findings: Assets & Opportunities: Audience

Some stakeholders have suggested that a segment of the international tourist market might represent a worthwhile opportunity for metro Detroit.

Several stakeholders emphasized the strong appeal metro Detroit has to certain types of international visitor — an appeal, many believe, that may be greater than metro Detroit’s appeal to other Americans.

Detroit may appeal to international visitors looking for “real” American culture and places.

Visitors from the UK, Germany and various Asian countries have all responded favorably to Detroit.

Other stakeholders note the international youth appeal of the TechnoFest.

Metro Detroit’s situation as a Northwest hub makes the city relatively more accessible to international travelers than many other US cities.

Learning from Other Cities

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Key Findings: Issues and Challenges

Atlanta| A big, spread-out city with certain parallels to Detroit

In Brief:

- Launched 2/2005 and endorsed by mayor 5/2006
- \$4.5mm Y1 budget. \$14mm additional pledged over next 2 years
- Developed to support the city's New Century Economic Development Plan
- Primary objective identified as building pride for Atlanta residents, to motivate residents and non-residents alike to experience and be a part of Atlanta

Note: *The following three summary case studies are excerpted from city tourism brand research that references several additional examples including Cleveland, Dallas, Hartford, Milwaukee, Pittsburgh and Las Vegas.*

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Key Findings: Issues and Challenges

Atlanta| Findings & Ideas

Research Key Takeaway

- Meeting and travel planners are basing more decisions on overall “destination appeal”

Brand Key Finding

- Atlanta has no one standout quality. The breadth of the city’s offerings became a driving idea of the brand initiative

Positioning

- “Differentiate on the spirit of the city” decision is represented by a positioning around “the three o’s”: “Boundless Opportunity, Inspired Optimism, Eternal Openness.”

Of Note

- For brand purposes, metro Atlanta was labeled and defined as “Atlanta”.
- The brand includes targeted messaging and outreach to the African American community.

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Key Findings: Issues and Challenges

Atlanta| Assets

Tagline: “Every day is an opening day in the ATL”

Logo: New red-and-white logo

Theme Song: “The ATL” by Atlanta hip-hop producer Dallas Austin

Takeaway: Experts are critical:

“No one’s going to come to Atlanta for the Three O’s.”

“Atlanta will need to overcome the hurdle of internal bureaucracy and the tendency of committees to create mediocre campaigns.”

Despite top talent involved (Ogilvy & Mather, Coca Cola, etc.) this campaign fails to satisfy some of the basic considerations of good brand deliverables.

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Key Findings: Issues and Challenges

Toronto| A top regional city brands itself

In Brief:

- Initiated May 2004, launched June 2005
- \$2mm initial investment
- Developed to reinvigorate the city's tourism industry, which had suffered sharply following the outbreak of SARS in 2003.
- Primary objective was to create a unified Toronto brand and convey a fresh, new way to communicate the city's strong and dynamic identity to the rest of the world.

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Key Findings: Issues and Challenges

Toronto| Findings & Ideas

Research Key Takeaway

- None cited. Scope of research was particularly extensive

Brand Key Finding

- The city's diversity and richness of offerings are important pillars on which to build the brand.

Core Thought/Brand Story

- **Toronto is the city of imagination** — built by the boundless imagination of the people who live there.
- Toronto's story is that of a major city with unlimited potential, offering unlimited fun, unlimited culture, and unlimited variety, hence the slogan.

Of Note

- Torontonians were invited to respond via a public engagement campaign at WeAreToronto.com
- Targeted messaging was extended to business and meeting planner audiences.

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Key Findings: Issues and Challenges

Toronto| Assets

Tagline: “Toronto Unlimited”

Logo: New logo

Theme Song: no

Brand Story: Yes. Multimedia presentations.

Takeaway:

Criticized by some in the public for its lack of originality.

Criticized by professionals for lack of tie-in back to “you” — relevance to individual.

Just months after Toronto’s launch, London (UK) launched a very similar campaign: “London Unlimited”, positioning London as the best city in the world in which to invest, visit, study and conduct business.

Recent initiative for the City of Pittsburgh also hinges on a positioning around “imagination”.

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Key Findings: Issues and Challenges

Hamburg| A city that wants to be on the radar but isn't

In Brief:

- Initiated early 2005, currently launching
- \$2mm initial investment
- Developed “to secure the city’s place in the premier league of cities alongside Barcelona, Amsterdam, Sydney, or Toronto.”
- Primary objective was “to optimize the city’s location marketing and systematically enhance Hamburg’s international attractiveness.”

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Key Findings: Issues and Challenges

Hamburg| Findings & Ideas

Research Key Takeaway

- Hamburg has strong positive associations among individuals and businesses alike (survey included 1,500 people from all over Germany and nearly as many businesses worldwide).

Brand Key Finding

- The city is regarded as one of the most beautiful in Europe; to stay that way it must continue to develop along a number of lines

Core Thought/Brand Story

- **Hamburg is “the growing city”**
- This idea is supported by four key themes: a green metropolis; a knowledge center; a travel entertainment and cultural destination,

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Key Findings: Issues and Challenges

Hamburg| Assets

Tagline: “Growing city”

Logo: updated version of city’s ancient logo; new visual identity

Theme Song: N/A

Brand Story: Yes. Along four main themes.

Takeaway:

The city identified its assets but has failed to clearly position itself.

The obvious takeaway, “The most beautiful city in Germany” wasn’t developed.

The city may have relied too much on external perceptions to drive brand development; lacking in authorship.

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Implications

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Key Findings: Assets & Opportunities

In work sessions, stakeholder shared their own criteria for the metro Detroit tourism brand's success:

Keep it young.

Translation: *Develop a tourism brand with young visitors (21-35) as the primary focus.*

Keep it forward-looking.

Translation: *Make “contemporary” activities, not heritage activities, the primary focus.*

Keep it real.

Translation: *Build a brand that embraces metro Detroit's authentic, vibrant and urban aspects — the things that truly set metro Detroit apart.*

Key Findings: Assets & Opportunities

In work sessions, stakeholder shared their own criteria for the metro Detroit tourism brand's success. Many of these align with key external research findings:

Deal with race.

Translation: *Go beyond showing diversity. Embrace the unique strengths of metro Detroit's African American heritage and make them an important part of the tourism brand.*

Deal with the insider factor.

Translation: *Provide practical recommendations for making metro Detroit more accessible to the leisure traveler.*

Know the demographic you're after.

Translation: *Gain further insight into the younger demographic: segmentation, media preferences, etc.*

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Key Findings: Assets & Opportunities

In work sessions, stakeholder shared their own criteria for the metro Detroit tourism brand's success. Many of these align with key external research findings:

Look for the hook.

Translation: *Don't settle for a brand story that anybody could tell just because it wins easy consensus. Push us to do something bold and memorable — we've got nothing to lose.*

Ask the naysayers.

Translation: *Invite everyone who is critical of this initiative into the process. Strive to be truly inclusive.*



Thank you.

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