

# Destination Diagnostic

Webinar  
May 21 2025

Oakland County Department of Economic Development



# Hello, thanks for joining us!

In the 'Chat', please tell us who you are and your relationship to Oakland County.



# Agenda

- 01 Project Updates
- 02 What Makes Us A Destination
- 03 How Does Our County Stack Up
- 04 Who's Visiting & How Do They Perceive Us
- 05 Valuing The Tourism Industry
- 06 Where Do We Go From Here

This presentation was developed by the consultant team, Think Place Agency + BLKDOG + Tourism Economics, on behalf of the Oakland County Department of Economic Development.

# 01 Project Updates





## Meet Our Team



Nur Asri  
Think Place Agency



Chris Coughlan  
BLKDOG



Zachary Sears  
Tourism Economics

We bring together experts in tourism economics, destination and community development, and place branding.

# What We're Doing Together

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## **DESTINATION DIAGNOSTIC & ECONOMIC IMPACT STUDY:**

Evaluate strengths & challenges of tourism product offerings and visitor perceptions

Quantify the value and impact of tourism in the County

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## **TOURISM & ATTRACTION STRATEGIC PLAN:**

Determine sustainable models for tourism development and management

Chart actionable strategies to attract new visitors, residents, businesses, and employees; and extend visitor stays by enhancing experiences, products, mobility and marketing.

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## **DESTINATION BRAND:**

Identify options for the County's tourism brand messaging, positioning, and visual identity

# Project Timeline

This Destination Diagnostic report is a milestone in the Visit Oakland planning process and is a culmination of key findings from a variety of research tasks conducted in the early phases of the project.

Project Launch &  
Discovery

**WHERE WE ARE:**  
Destination  
Diagnostic

Vision, Brand  
Concepts & Tourism  
Strategy

Brand Launch &  
Visit Oakland  
County Plan



Jan-Apr 2025

May 2025

May-Aug 2025

Aug-Oct 2025

# Project Impact To-Date

The County's first tourism strategic planning process

**120+**  
industry  
interviews/  
focus group  
attendees

**1,800+**  
survey  
responses

**2,000+**  
project info  
reach

(incl. County newsletter,  
social media, project  
website)

**14,000+**  
POIs assessed

# Why should the County care about its tourism economy and place brand?

## The Destination Management Cycle

– Maura Gast FCDME/Destinations International

If you build a place people want to visit, you build a place where people want to live.

If you build a place where people want to live, you'll build a place where people want to work.

If you build a place where people want to work, you build a place where business needs to be.

If you build a place where business has to be, you'll build a place where people have to visit.

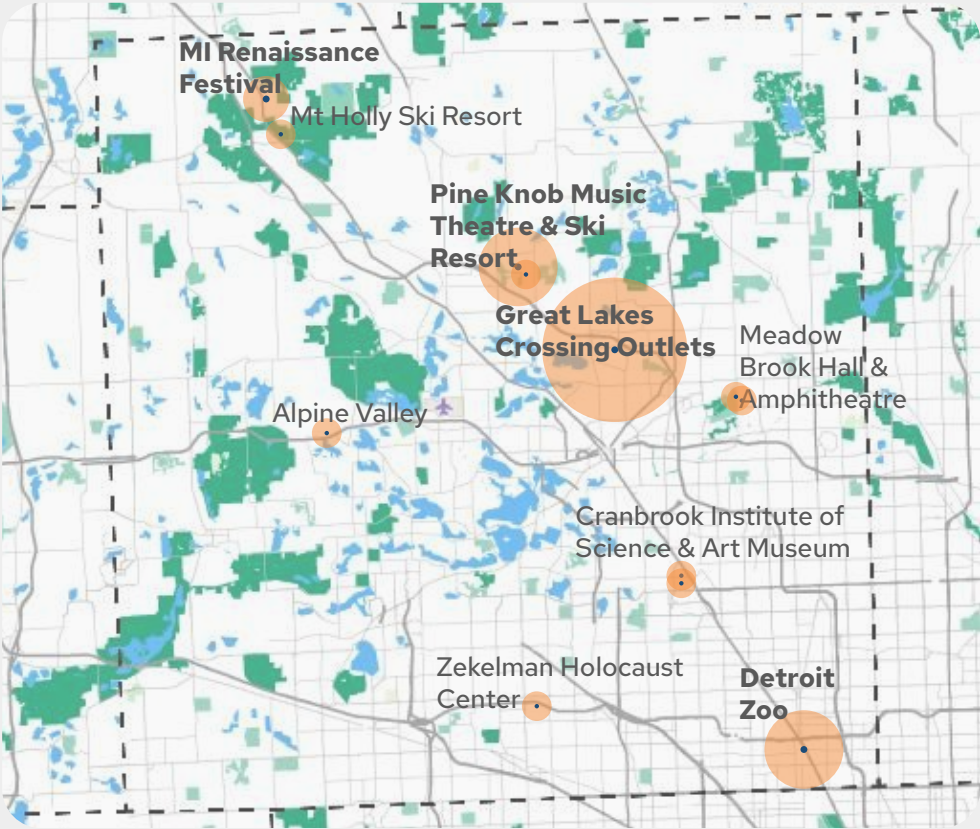
# 02 What Makes Us A Destination

Let's look at our tourism product inventory  
and what's on offer for visitors today



We invite  
curiosity and  
shared fun  
family  
experiences.

Experience Pillar #1



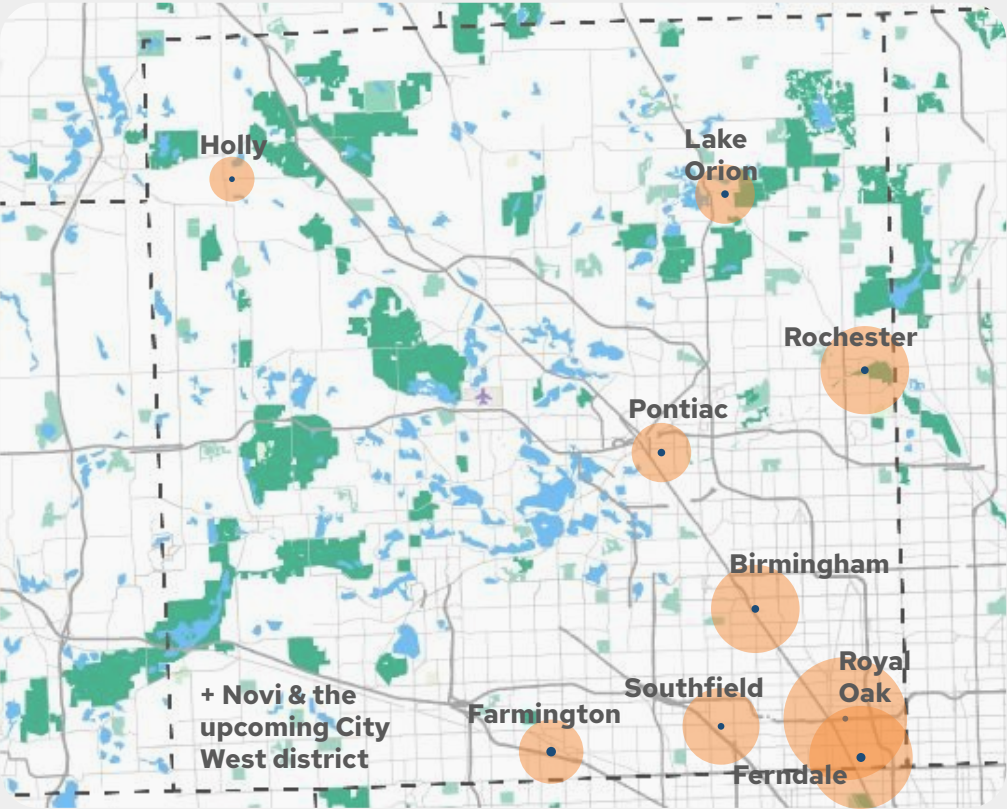
Our top visited attractions and venues invite curiosity in culture, arts, history, and science, and most importantly, support shared fun family experiences.

Asset	Type	2024 Total Visitors
Great Lakes Crossing Outlets	Attraction	2,400,000
Detroit Zoo	Attraction	750,600
Pine Knob Music Theatre	Venue	738,800
Renaissance Festival	Attraction	294,300
Pine Knob Ski	Outdoor Sports	94,300
Meadow Brook Hall	Attraction	71,900
Mt Holly	Outdoor Recreation	57,800
Meadow Brook Amphitheatre	Venue	56,600
Holocaust Memorial Center	Attraction	43,800
Cranbrook Institute of Science	Attraction	43,100
Alpine Valley	Outdoor Sports	32,000
Cranbrook Art Museum	Attraction	31,300
Wildwood Amphitheater	Venue	13,400

Source: Placer.Ai (Jan 01, 2024-Dec 31, 2024)

**We are every  
other metro  
Detroiter's  
hometown**

Experience Pillar #2



Our downtowns are major visitor assets as hubs of shopping, dining, entertainment, and most importantly, family-friendly events. But not all of them are tourism-ready.

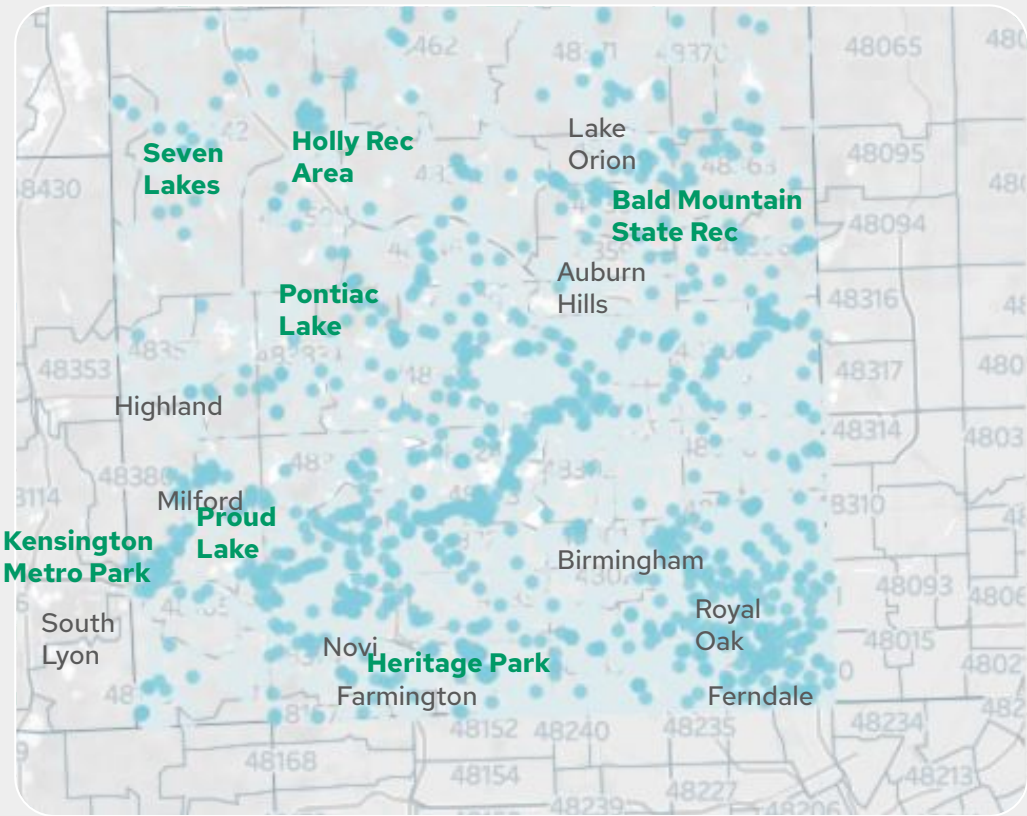
Downtown	2024 Total Visitors
Royal Oak	1,900,000
Ferndale	1,300,000
Birmingham	1,100,000
Rochester	1,100,000
Southfield	927,300
Farmington	638,700
Lake Orion	493,300
Pontiac	490,400
Holly	374,000

Source: Placer.Ai (Jan 01, 2024-Dec 31, 2024)

Community	Tourism Readiness Status	Community	Tourism Readiness Status	Community	Tourism Readiness Status
Auburn Hills	Ready	Clarkston	High Potential	Berkley	Emerging
Birmingham		Franklin	High Potential	Beverly Hills	Emerging
Farmington		Highland	High Potential	Groveland	Emerging
Ferndale		Holly	High Potential	Clawson	Emerging
Lake Orion		Lyon	High Potential	Hazel Park	Emerging
Milford		Madison Heights	High Potential	Lathrup Village	Emerging
Novi/Suburban Showplace Collection		Oxford	High Potential	Leonard	Emerging
Rochester		Pontiac	High Potential	Ortonville	Emerging
Royal Oak		Oak Park	High Potential	South Lyon	Emerging
Southfield		Lyon	High Potential		

We offer metro  
Detroitters the  
Great  
Outdoors

Experience Pillar #3



There are over 1,100+ points of interest in the great outdoors, giving Metro Detroiters access to a range of opportunities to be in the great outdoors.

The highest-rated nature-related assets in the County each feature an average rating of at least 4.5/5.0 stars, with upwards of 1,500 reviews left by users. These traits increase their visibility to potential audiences/new visitors

Asset	Average Rating	Total # Review
Kensington Metro Park	4.7	4,162
Holly Recreation Area	4.6	2,986
Rochester Park	4.8	2,870
Pontiac Lake	4.5	2,283
Proud Lake	4.6	2,314
Seven Lakes State Park	4.7	2,177
Heritage Park	4.7	2,359
Bald Mountain State Recreation Area	4.6	1,856

Source: Think Place Agency (2025) - based on consumer review data available through Google.

# The Great Outdoors

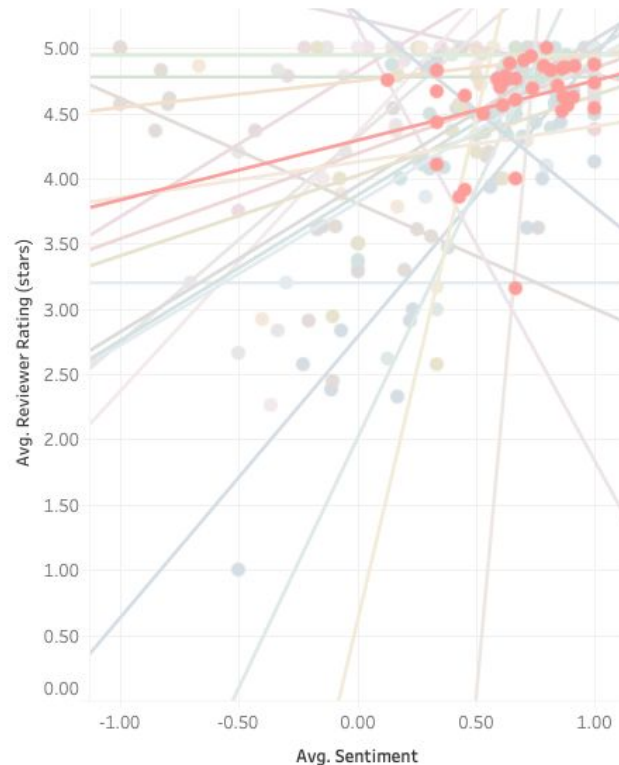
At this time, positive consumer sentiments/ reviews shared of major nature-related assets are related to 'family-friendliness' and 'cleanliness/maintenance'.



Oakland's parks are some of the most accessible assets in the State.



Correlations by topic



# Our Big Opportunity

There are strategic opportunities to be leveraged in the great outdoors and other experience pillars through enhanced convenience, connectivity and access.

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We don't welcome visitors who don't have their own private vehicle.

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# Poll Time!

Rank our County's experience pillars in order of importance to drive visitation

# 03 How Does Our County Stack Up

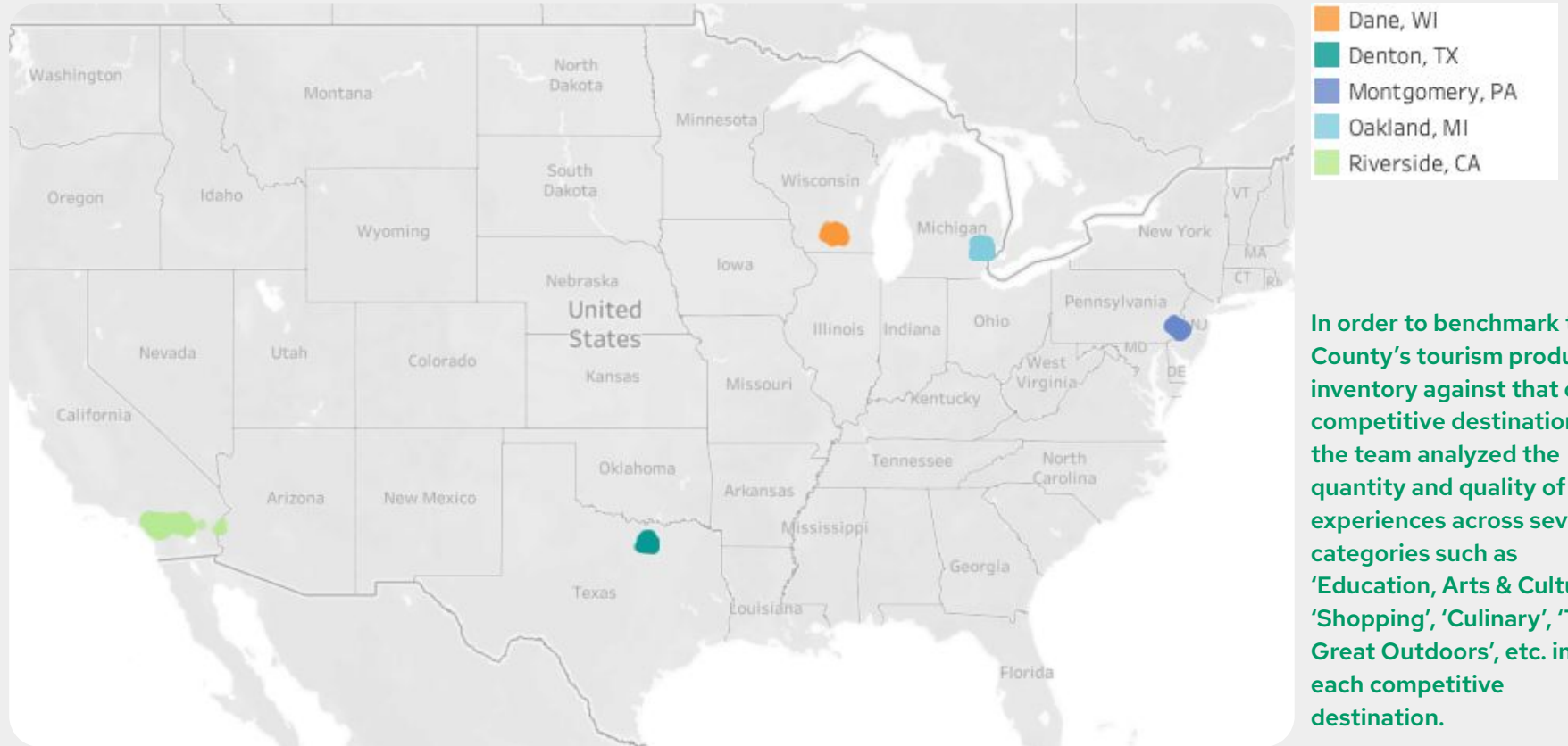
Let's talk about how our brand and visitor products/experiences fair against similar destinations across the nation



County	Tourism Entity	Airport - Annual Passengers (Millions)	Average Drive Time to Next Major City (minutes)	Total Hotel Rooms	Annual Visitor Spending (\$ - Millions)
Oakland MI	Visit Detroit	32,972	35 (Detroit)	17,350+	3,300
Denton TX	Discover Denton	87,818	45 (Dallas)	9,370+	1,246
Montgomery PA	Valley Forge Tourism & Convention Board	28,132	40 (Philadelphia)	9,510+	1,402
Dane WI	Visit Madison	6,316	75 (Milwaukee)	11,390+	1,200
Riverside CA	Visit Greater Palm Springs	3,237	75 (San Bernardino)	33,640+	9,207

# The Comp Set

Sources: Bureau of Transportation Statistics; CoStar; Tourism Economics (based on data from last available year).

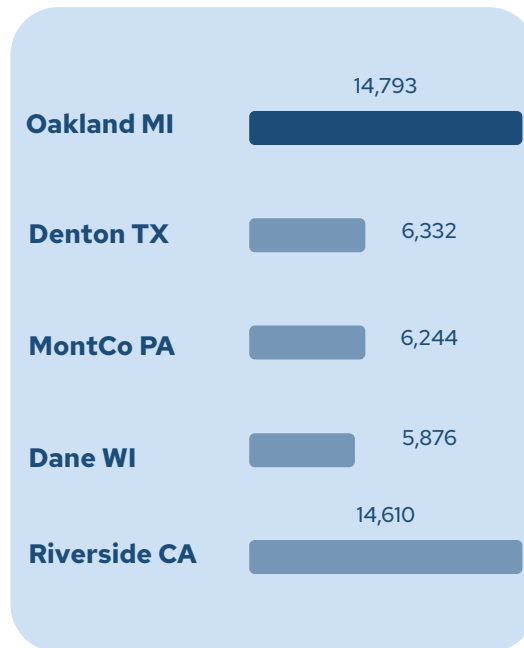


In order to benchmark the County's tourism product inventory against that of competitive destinations, the team analyzed the quantity and quality of experiences across several categories such as 'Education, Arts & Culture', 'Shopping', 'Culinary', 'The Great Outdoors', etc. in each competitive destination.

# We are a big destination.

Oakland MI offers visitors the largest supply of tourism products and experiences. The County has over **14,700+ points-of-interest** across all assessed categories.

## Total # Products/Experiences

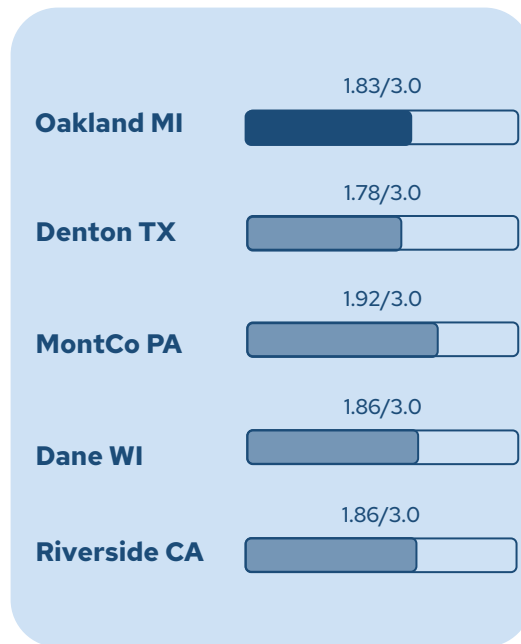


Source: Think Place Agency (2025)

# We are price-competitive.

Oakland MI is a price-competitive destination for travelers seeking lower cost experiences in a tighter economy - particularly for those traveling in larger groups like families.

## Average Price Level of Products/Experiences



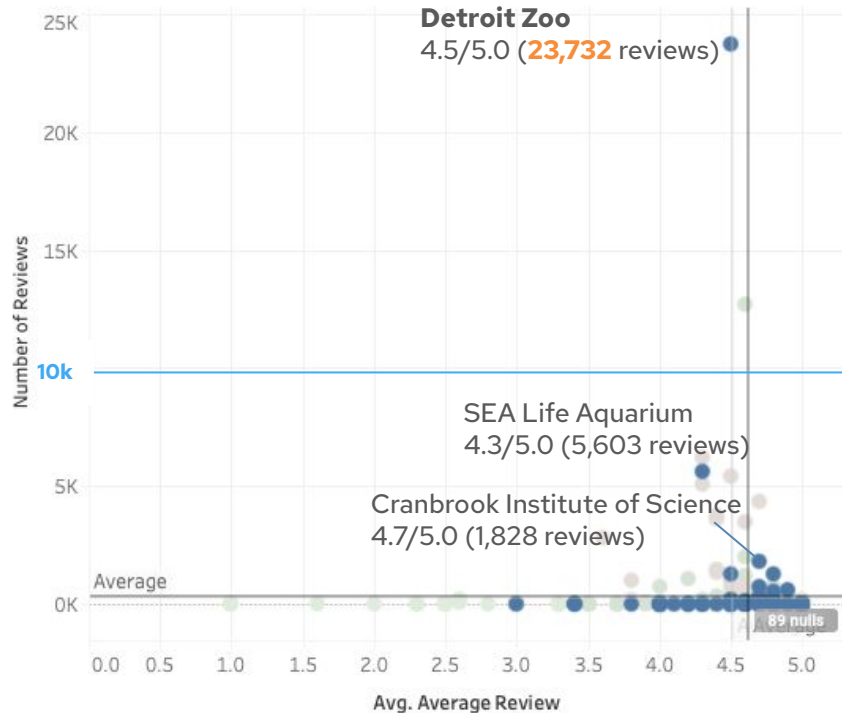
Source: Think Place Agency (2025)

# We have two heavy- weight assets.

The Detroit Zoo and Pine Knob Music Theatre punch far above their weight on visibility/recognizability as well as quality of experiences as reported by visitors.

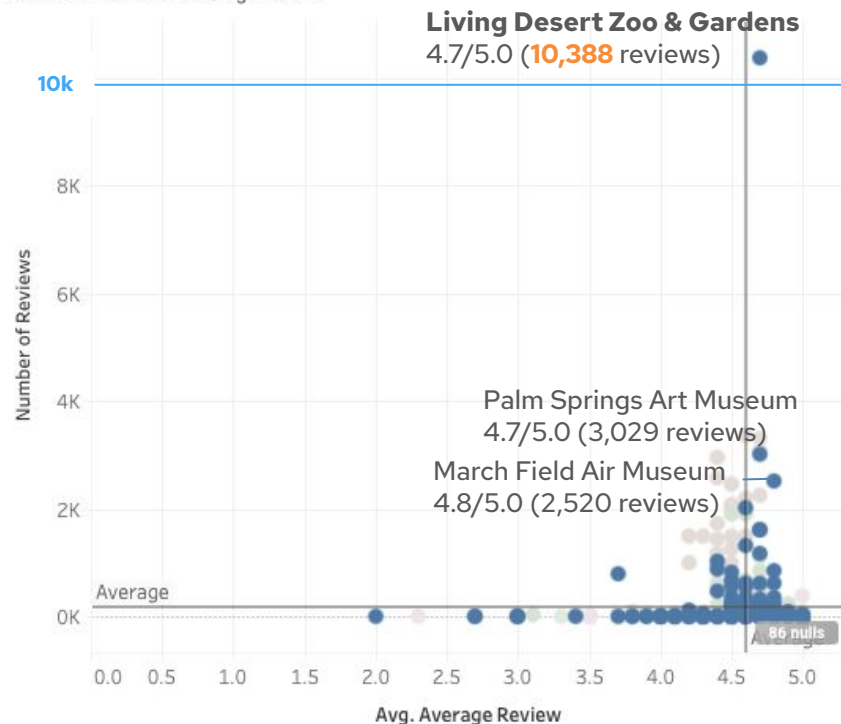
Number of Reviews x Average Review

Oakland County MI



Number of Reviews x Average Review

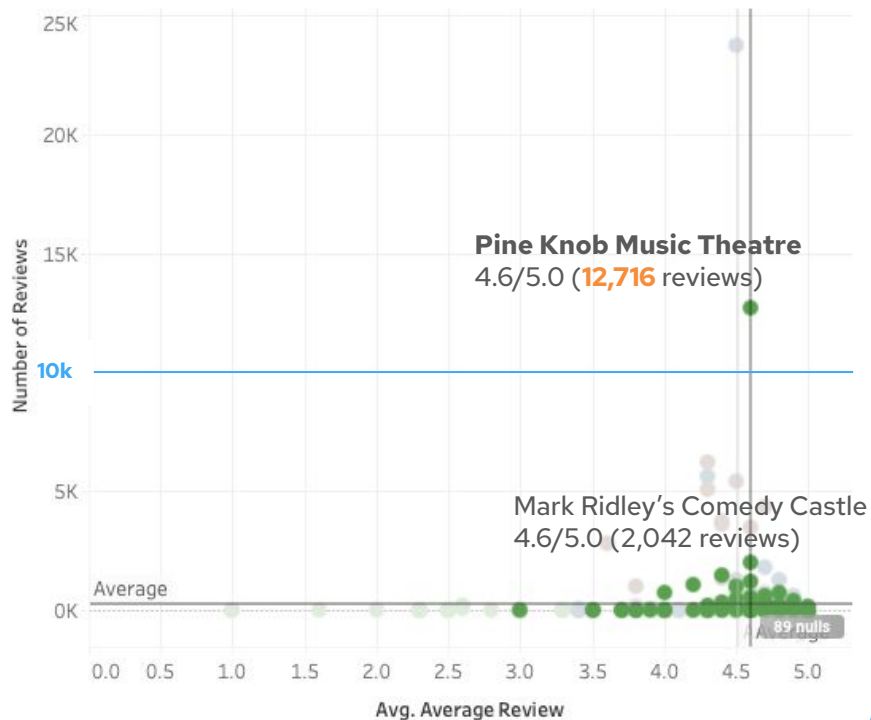
Riverside County CA



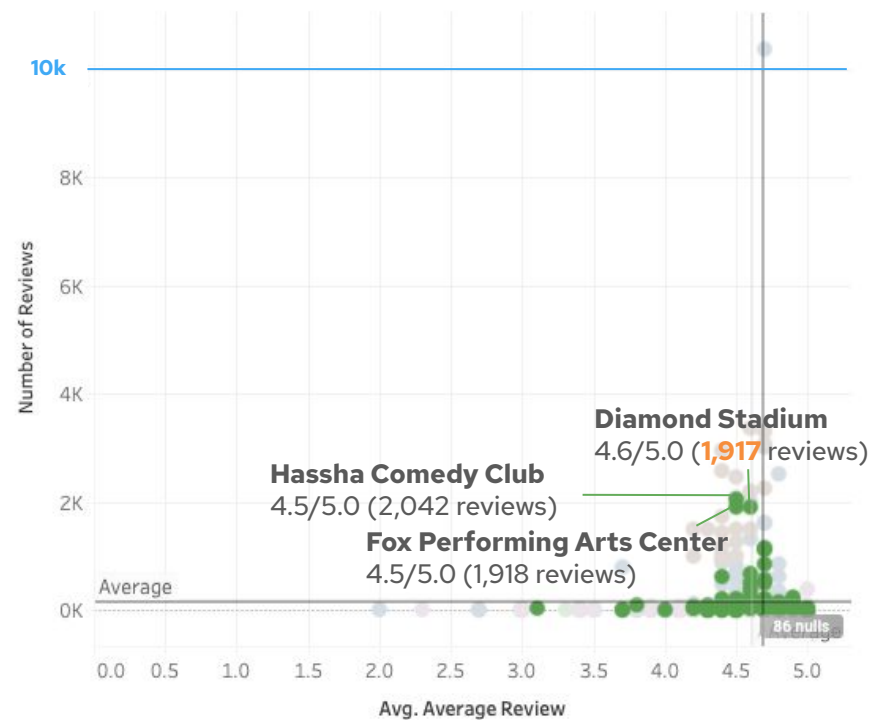
Museums, Historical Sites &amp; Similar Institutions in Oakland County MI and Riverside County CA.

Source: Think Place Agency (2025)

Number of Reviews x Average Review



Number of Reviews x Average Review



Performing Arts & Related Industries in Oakland County MI and Riverside County CA.

Source: Think Place Agency (2025)

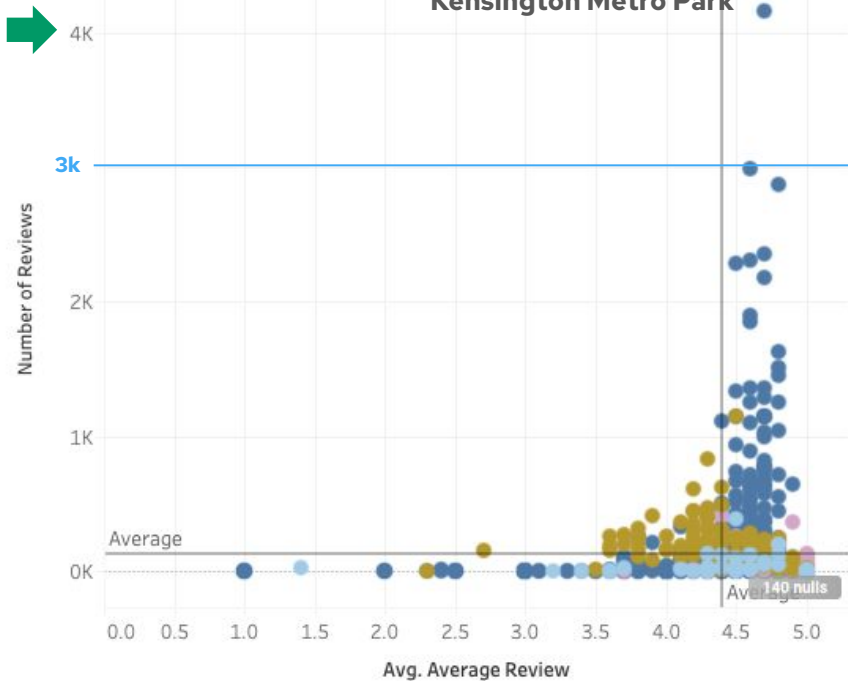
# Our Big Opportunity

Oakland's nature parks/scenic viewpoints and outdoor recreation facilities are significantly less reviewed, impacting its potential draw as the 'urban escape' to the great outdoors.

Number of Reviews x Average Review

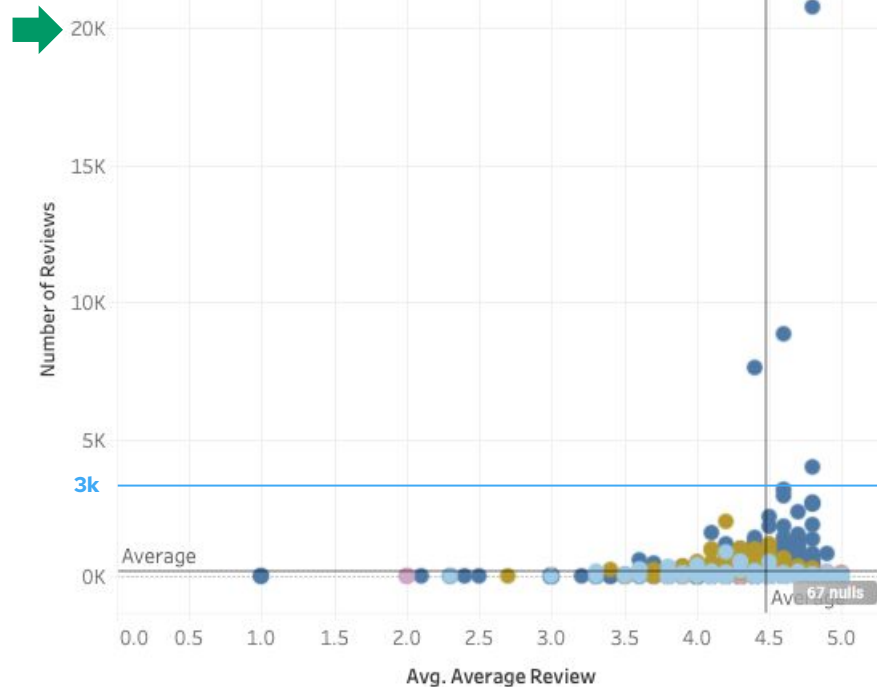
Oakland County MI

Kensington Metro Park



Number of Reviews x Average Review

Riverside County CA



Great Outdoors Products/Experiences in Oakland County MI and Riverside County CA.  
Source: Think Place Agency (2025)

**We need to  
cheerlead for  
Detroit but  
advocate for  
ourselves**

# A Disparate County Brand & Messaging

The County has had and still has a range of sub-brands in which it uses to promote its varying programs, services and amenities.

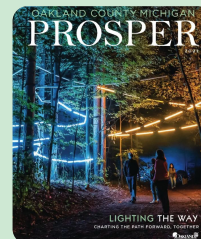
From Parks to Main Streets to the County blog, there

are various avenues through which the consumer (whether local or out-of-towner) must navigate to build a comprehensive understanding of the County as a place to be.

## ALL AUDIENCES



### B2C/CONSUMER AUDIENCE (LOCALS, VISITORS)



### B2B/BUSINESS



# Poll Time!

Do you agree about the disparateness  
of our County's brand and messaging?

# Lessons in Branding Large County Destinations with Major City Adjacency



The brand centers Madison's distinctive appeal as state capital and college town – cosmopolitan yet true to local character.

## STRENGTHS:

**"With Love, Madison"** campaign celebrates the inclusive attitudes of the region, with something for every visitor or local to enjoy, no matter their interests.

**"Wright in Madison"** offers a self-guided journey through the places where Frank Lloyd Wright lived, learned and found inspiration in

## CHALLENGES:

While the capital city is a major strategic advantage, the destination's branding relies heavily on this. Promotion of other communities in the county feels like an afterthought.



## DISCOVER DENTON TX

The brand emphasizes the city as an indie, charming alternative to Dallas-Fort Worth and smaller, quirky counterpart to Austin.



### STRENGTHS:

Events and attractions define Denton's tourism as a mix of Texas heritage, collegiate arts/culture, and outdoor leisure.

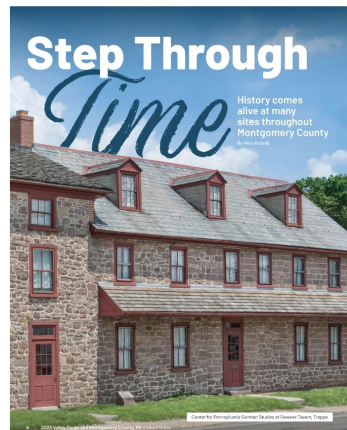
**"Far Out Vibes, Down Home Feel"** campaign combines the advantages of a bustling North Texas metroplex with its small-town charms. Discover Denton markets itself actively as lower-cost alternative meeting/event location in Dallas-Ft Worth.

### CHALLENGES:

The brand's efforts are focused on the city of Denton, relying heavily on a niche of music and the arts, and therefore has not much else to bring in families outside of sports tourism, or older adults without an existing connection to the colleges or city.



**“Let Freedom Reign” carries the brand from colonial-era historic sites to outdoor adventure and nightlife.**



## STRENGTHS:

A rich mix of attractions supports the “freedom to choose your adventure” branding.

**Use of #MakeitMontco for local pride** has propelled the use in branding and marketing initiatives:

- Crave Montco
- Arts Montco
- Shop Montco

## CHALLENGES:

The county and its attractions are sprawling, which dilutes the sense of place. This is compounded by the use of two brands: Valley Forge and Montco.

There’s ongoing education required for visitors to understand that Montgomery County = Valley Forge area plus much more.



The destination brand for Riverside County is regional, not county-specific.



### STRENGTHS:

Each key tourism asset has a brand that aligns with visitor expectations - rejuvenation and escapism, and reflects the region's variation.

For example, "Find Your Oasis" for Greater Palm Springs (Central) and "Discover the SoCal Wildlands" for 10Lake Valley (SW).

### CHALLENGES:

The visitor economy is heavily influenced by marquee events such as Coachella Music Festival.

Additionally, the separate tourism asset brands could potentially create confusion for county visitors depending on how they do or do not work together.

# 04 Who's Visiting & How Do They Perceive Us

Let's see if visitor perception aligns with  
product offerings



# Visit Oakland County Survey 2025

The County's very first visitor perception survey

**1,811** total responses

**1,439** completed the survey (79%)

**6.5** minutes spent on survey

**30** total questions (mostly MCQ)

# Respondent Demo

It is also important to acknowledge limitations of the survey. The survey received an overwhelming response from respondents that identify their race/ethnicity as 'White' and with median age of 55.

91% of total respondents live in the metro Detroit area, of which they include the following:

- Oakland ZIP codes - 95%
- Wayne ZIP codes - 2%
- Macomb ZIP codes - 1%
- Livingston ZIP codes - 1%

9% of total respondents live outside metro Detroit, of which they include the following:

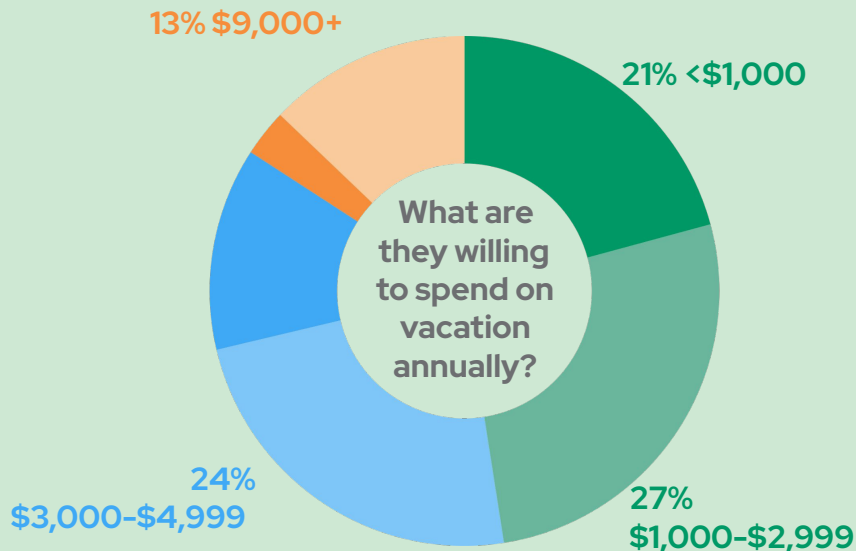
- MI ZIP codes - 74%
- Other States - 26% (predominantly OH, IN, IL ZIP codes)

## The Out-of-Towner:

Our budget savvy SE Michigander and Midwestern explorer

**100%**  
would  
visit  
Oakland  
County  
again

(if they've been to  
Oakland County  
before.)



On a  
scale of  
1-10...

What is your overall  
impression of Oakland  
County as a  
destination?

**6.2**

(0- Extremely negative, 10 - Extremely positive)

How likely are you  
to recommend  
Oakland County as  
a place to visit to  
friends/ family?

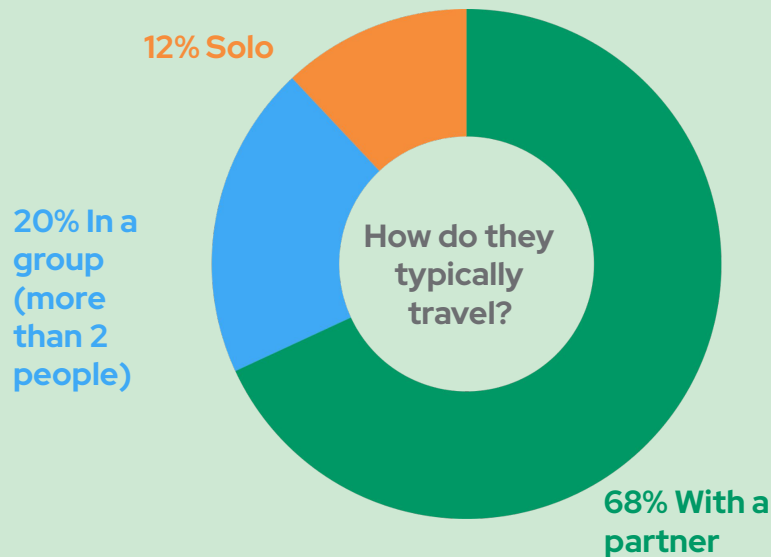
**6.3**

(0- Extremely Unlikely, 10 - Extremely Likely)

## The Metro Detroiters:

Our loyal regional visitors & destination ambassadors

9 in 10  
would  
visit  
Oakland  
County  
again



On a  
scale of  
1-10...

What is your overall  
impression of Oakland  
County as a  
destination?

6.4

(0- Extremely negative, 10 - Extremely positive)

How likely are you  
to recommend  
Oakland County as  
a place to visit to  
friends/ family?

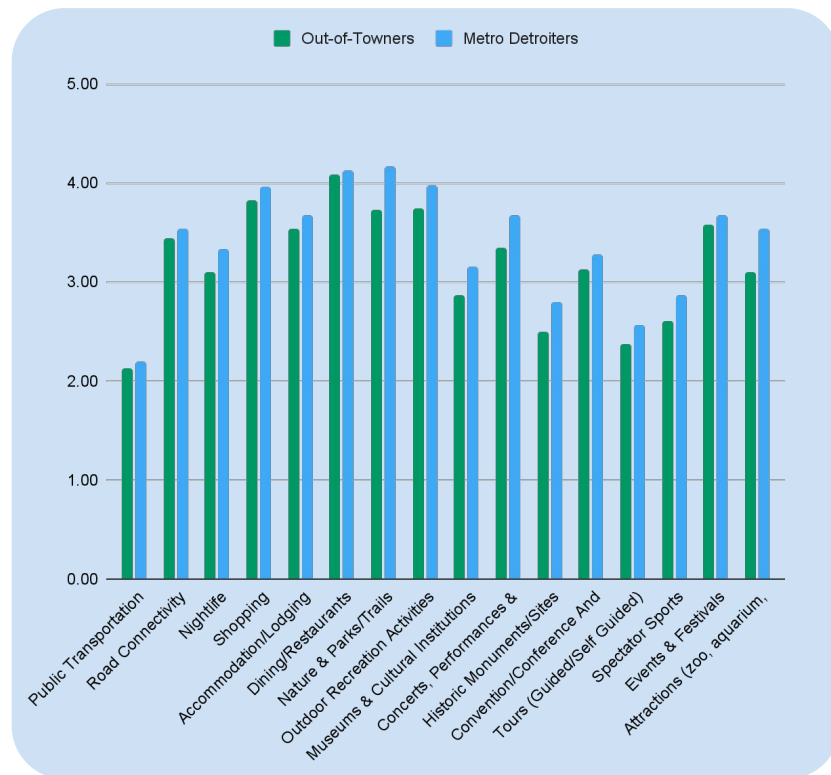
6.3

(0- Extremely Unlikely, 10 - Extremely Likely)

# Our growth opportunities

Beyond dining/shopping and our great outdoors, our County stands out with its events and festivals. However, our lack of alternative mobility options between tourism products and experiences poses risks to our visitor economy.

How would you rate the overall quality of each of the following factors in Oakland County?



2025 Visit Oakland County Survey. Source: Think Place Agency (2025)

# Share with us

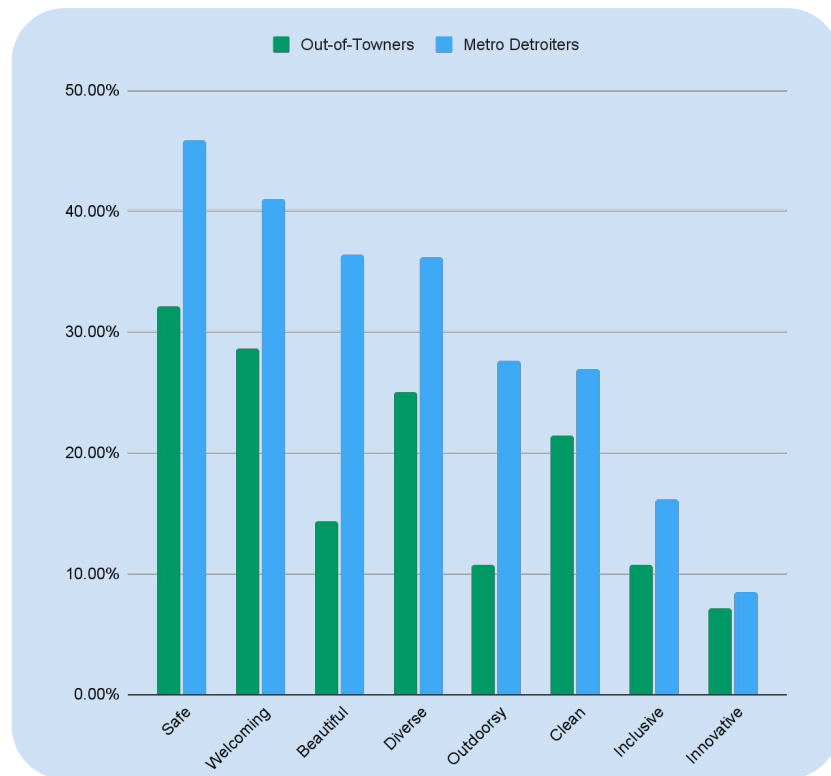
What are the best events/festivals/celebrations  
in Oakland County?

# Our growth opportunities

Our beautiful, great outdoors are currently only serving those 'in the know'.

**79%** Metro Detroiters rated Nature & Parks/Trails as 'very good'/'excellent', compared with 43% of out-of-towners

Oakland County is a ..... Destination. (Fill in the blank)



2025 Visit Oakland County Survey. Source: Think Place Agency (2025)

# Share with us

What assets/sites/experiences in the great outdoors do you think we should be highlighting in Oakland County?

# 05 Valuing the Tourism Industry

Let's understand the breadth of impact of the tourism industry

**Note:** This analysis was led by Tourism Economics.

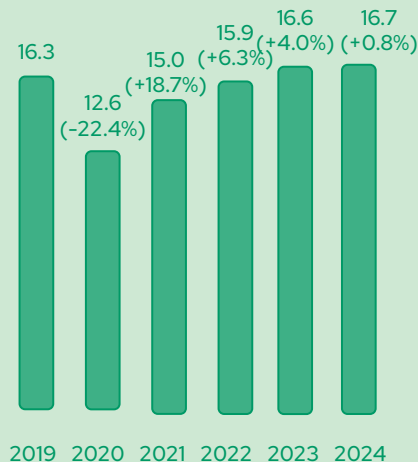


# The Status Quo:

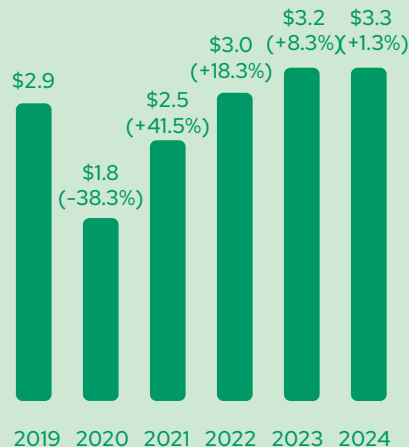
In 2024, 16.7 million visitors spent \$3.3 billion across Oakland County.

On average, \$9.0 million was spent every day by visitors in Oakland County in 2024.

**Oakland County Visitor Volume**  
(millions)



**Oakland County Visitor Spending**  
(\$ millions)



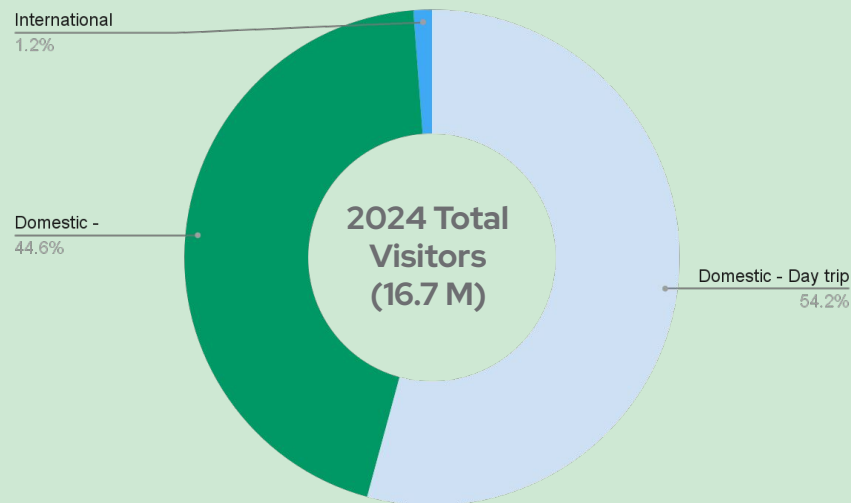
Source: Tourism Economics (2025)

# The Status Quo:

99% domestic travelers  
1% international travelers

Overnight visitor volume growth was relatively flat at 0.4%, **trailing day visitor volume at 1.0%.**

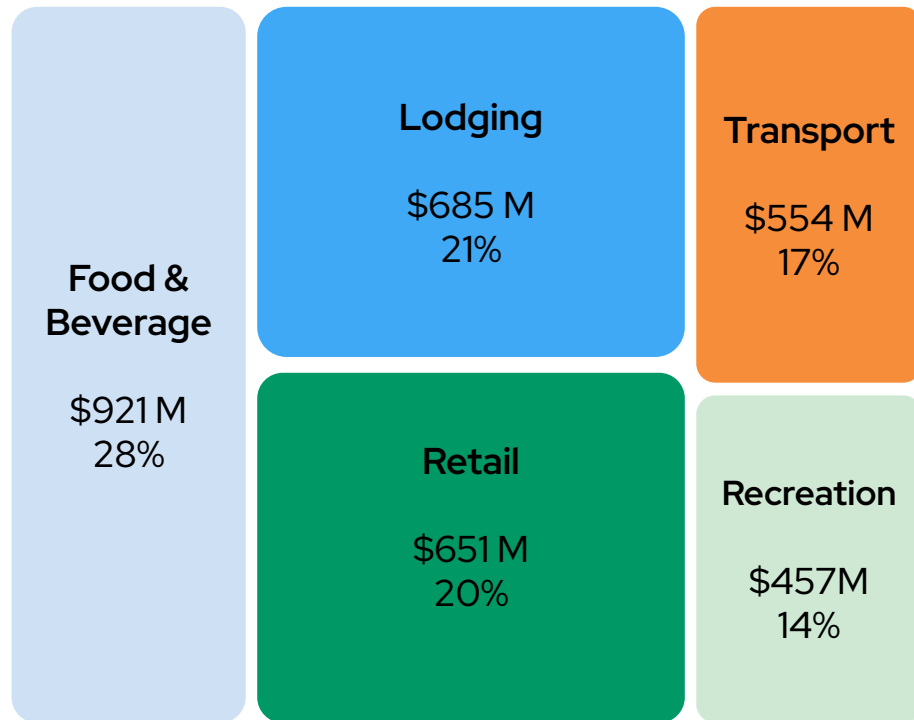
Oakland County Visitor Volume by segments



Source: Tourism Economics (2025)

# Visitor spending growth of 1.3% in 2024 was driven by moderate increases in both prices and real demand.

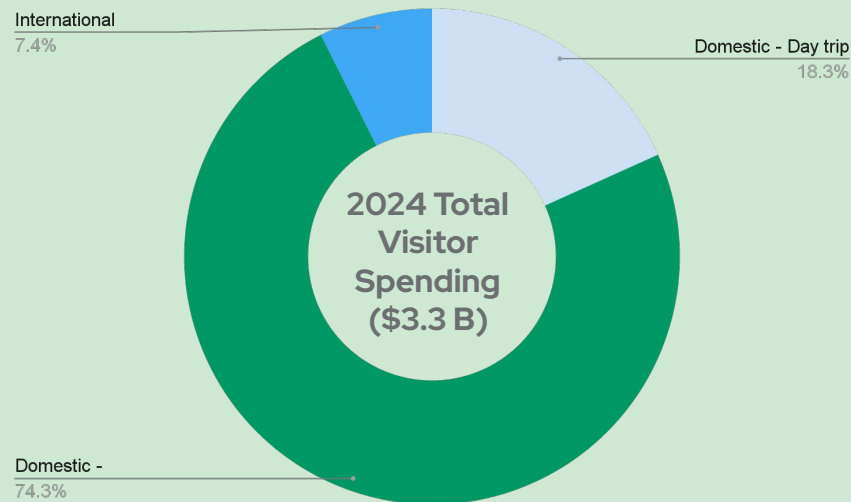
Food and beverage spending led increases in 2024 with an 3.9% expansion, driven in part by 2.9% growth in prices. Visitor spending on recreation and lodging also expanded 2.5% and 1.4%, respectively.



Source: Tourism Economics (2025)

Overnight  
domestic  
visitors  
accounted for  
74% of spending

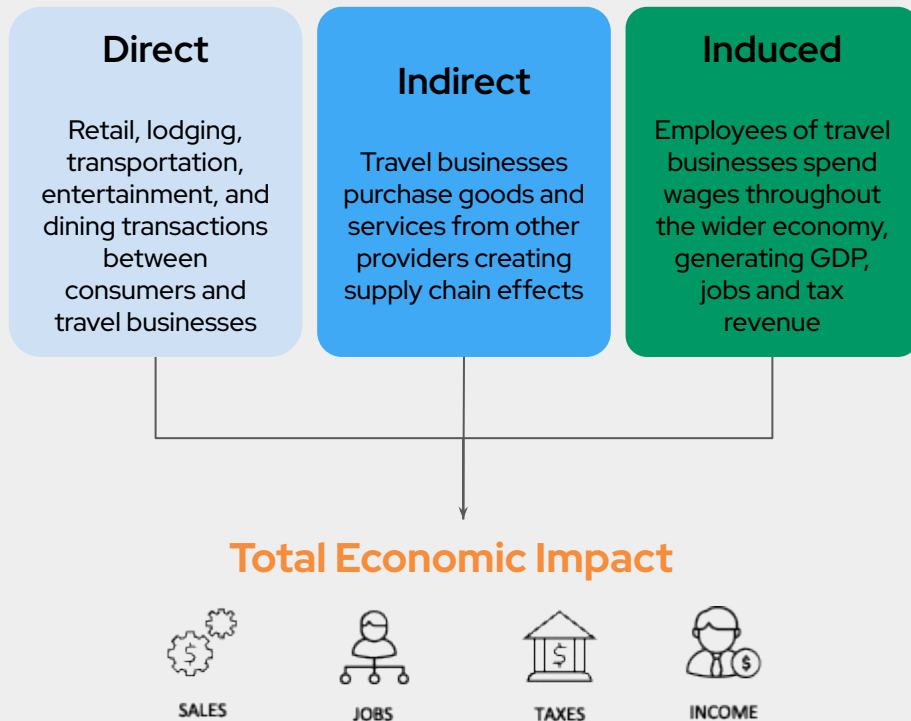
Oakland County Visitor Spending by segments



Source: Tourism Economics (2025)

To determine total economic impact, we analyzed the downstream effects of this spending on the broader economy.

### Economic Impact Framework



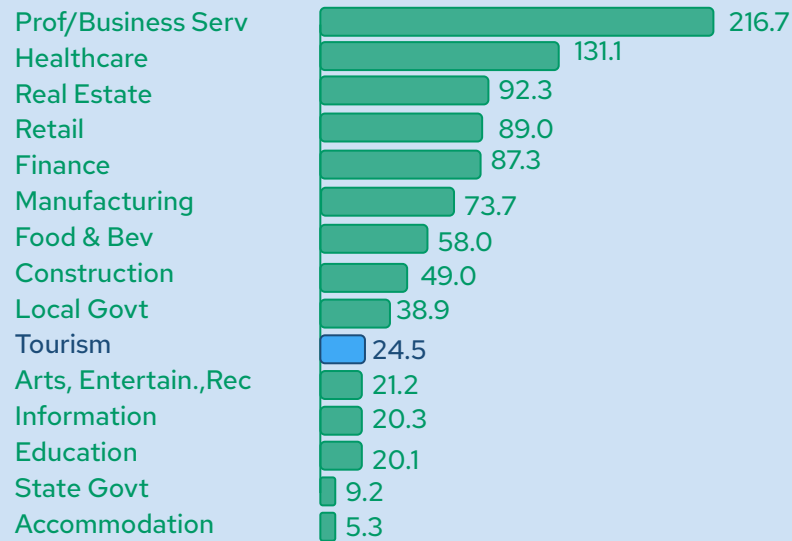
The visitor economy contributed a total of \$4.9 billion in sales accrued to industries across the economy.



The tourism industry in Oakland County directly supported 24,456 local jobs. Taken together as an industry, tourism jobs rank 10th in Oakland County.

### Visitor Supported Employment in Oakland County

Jobs in thousands



Source: BEA, BLS, Tourism Economics

The total jobs impact of the visitor economy was 40,637 jobs in 2024, or 1-in-25 of all jobs in Oakland County.

If every visitor-supported employee were in one place it would be enough to fill Ford Field two-thirds full.



## Visitor activity generated a total of \$1.4 billion in labor income, including indirect & induced impacts.

Visitor activity supports more than \$100 million in total labor income for F&B, Lodging, Retail, FIRE, Rec & Entertainment, Business Services industries.



**Visitor economy generated nearly \$426 million in state and local government revenues in 2024.**

Each household in Oakland County would need to be taxed an additional \$805 to replace the visitor-generated taxes received by state and local government in 2024.

The taxes received is enough to fund the average salaries of 6,600 public school teachers in the County.

# Poll Time!

Did you know how valuable the tourism economy was to the County before today?

# 06 Where Do We Go From Here

Let's talk about our areas of opportunity to grow and develop our place brand and visitor experiences

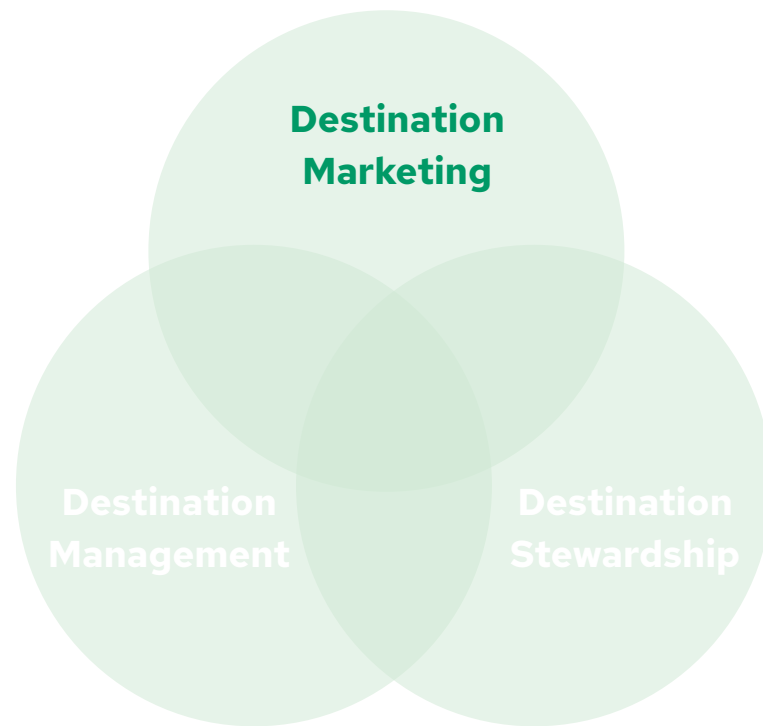


# Build Partnerships

While we have a strong, existing destination marketing entity (Visit Detroit) overseeing regional marketing, we need to do a better job of putting ourselves on the map and stewarding our county as a destination too.



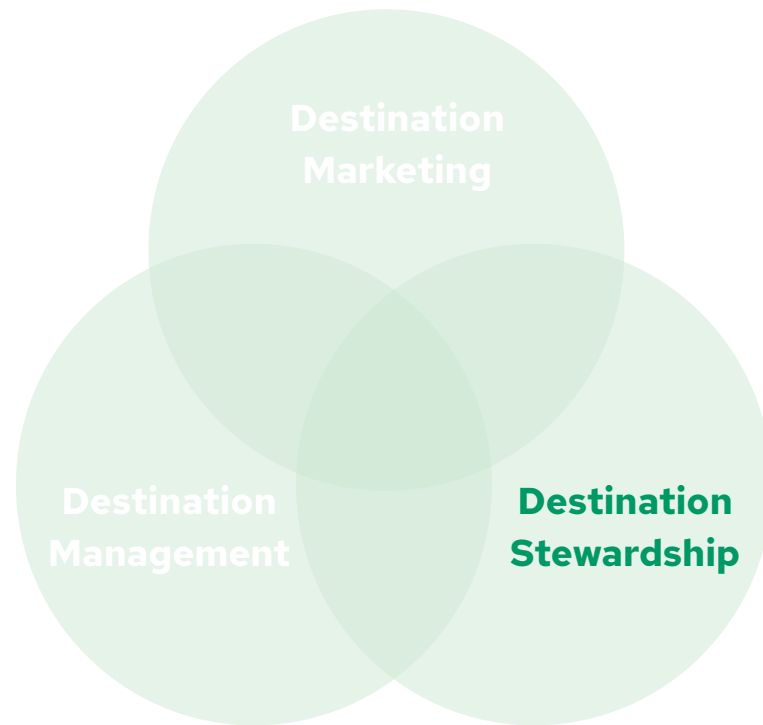
**DESTINATION MARKETING** is primarily focused on attracting visitors by promoting its unique attractions and experiences, rather than focusing on individual products or services. Its key functions also include ensuring the creation and **maintenance of a positive image** of the destination.



**DESTINATION MANAGEMENT** emphasizes connecting various components of a destination to **create a cohesive and quality experience**, and **creating a coalition of organizations/** interests working towards the competitiveness and sustainability of the destination.



**DESTINATION STEWARDSHIP** is focused on the continuous pursuit of a net positive tourism ecosystem that balances a positive tourism experience for visitors with that of the needs of local communities (including meeting the economic, environmental, and social/cultural needs of a destination). According to the World Travel & Tourism Organization, to succeed, destination stewardship requires full public-private-community collaboration.



# Leverage our strong experience pillars

- 1 **We must build on our niche opportunity to offer the great outdoors from May through October to Metro Detroiters/visitors to the City of Detroit.**
- 2 **We must leverage our identity as a destination that invites you to make the ordinary extraordinary.**
- 3 **We should build on the success of our downtowns and year-round calendar of cultural events and festivals.**

# Focus on our core audiences

- 1 We are our region's hometown, bringing generations of diverse families together year-round.
- 2 We are an escape for Metro Detroiters and urbanites from across SE Michigan.

# What's Next?

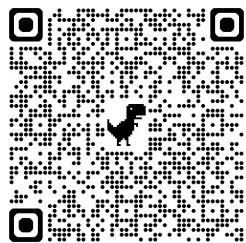
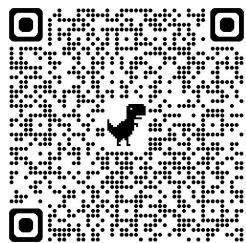
## In-Person Workshops

**June 16 | 6-8pm**

Sundquist Farmington  
Pavilion

**June 17 | 9-11am**

Rochester Hills  
Museum



# Spread the word!

Following the meeting we will share a kit of assets for you to use and tell others about the workshops!



# Questions?



# Thank You!

