



Positioning Waterside Communities as Tourism Gateways to America's Great Outdoors

*Growing International and Domestic Destinations
Through Water and Nature Based Efforts*

**January 19, 2011
2:15 - 3:45 PM Eastern**

Webinar Overview

Today's Agenda

- Meet The Panel
- Presentations by Today's Panel
- Featured Panel Discussion
- Moderator's Recap
- Questions & Answers with the Audience
- A Thank You from Our Sponsor

Meet the Panel

Today's webinar, "**Positioning Waterside Communities as Tourism Gateways to America's Great Outdoors**," features...



Moderator
Brett Stawar
President/CEO
Alton Visitors &
Convention
Bureau



Presenter
Jan Kostner
Deputy Director
Illinois Office
of Tourism



Presenter
Ron Erdman
Deputy Director
Office of Tourism
& Travel, US Dept.
of Commerce



INTERNATIONAL
TRADE
ADMINISTRATION

International Travel to the US



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group *Webinar Series*

Presented by:

RON ERDMANN

Office of Travel and Tourism Industries
International Trade Administration
U.S. Department of Commerce
January 2011



A Look At Today's Agenda

- ◆ Travel & Tourism Industry Trends
 - ◆ U.S. Trends: Spending/Exports and Arrivals
 - ◆ Traveler Characteristics of International Travelers to the U.S.
- ◆ Forecast for International Travel to the U.S.
- ◆ Putting the Pieces Together
- ◆ Questions and Answers

Travel Volume to the United States

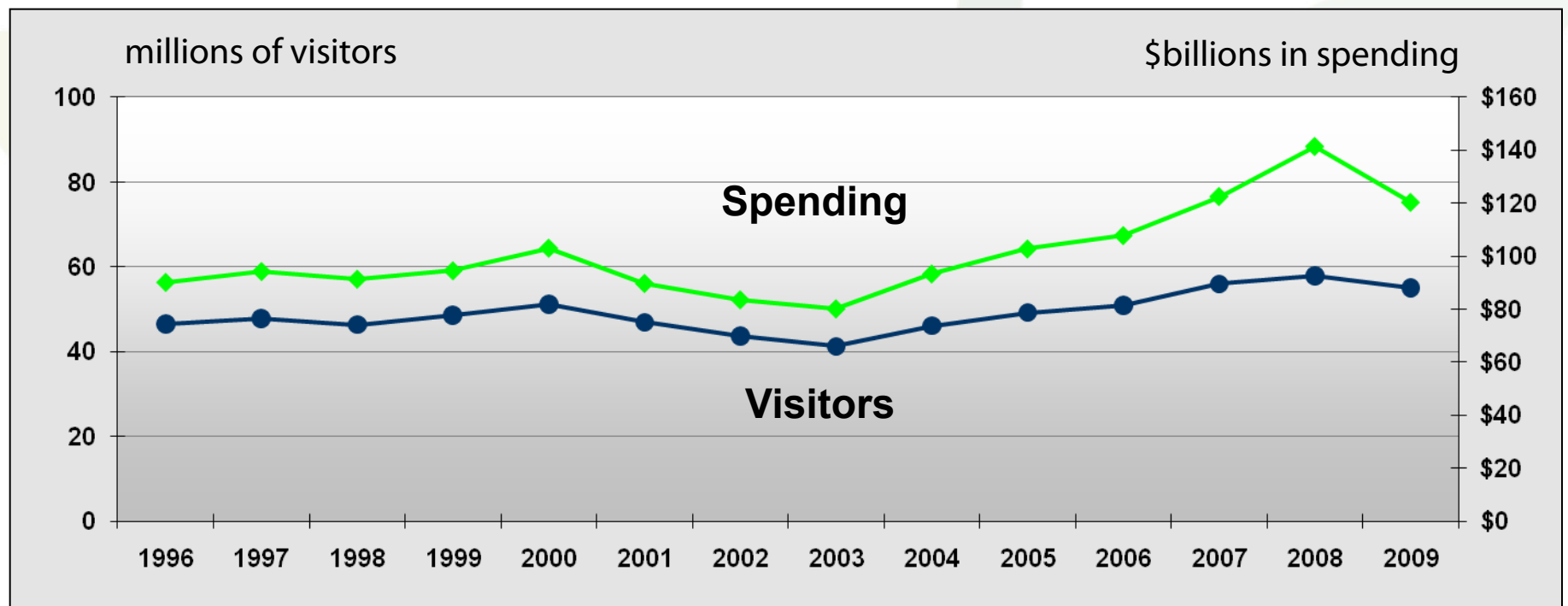


International Travel & Tourism to the U.S. (2009)

- ◆ **Largest services sector export** –\$120 billion in 2009.
- ◆ **Third-largest merchandise/services export category.**
- ◆ Generated a **trade surplus** of \$21 billion.
- ◆ Supported **1.1 million jobs.**
- ◆ International travelers spend **4-7 times more** than domestic travelers on a trip:
 - **Length of the trip** is 2-4 times greater than domestic travelers.
 - International travelers have **higher activity participation rates** than domestic travelers.
 - International travelers were **more inclined to stay at hotels/motels & rent cars** than a domestic traveler.
- ◆ 4% of travelers, but 17% of traveler spending, payroll, employment and taxes.

U.S. Visitors and Spending (1996 - 2009)

Visitor spending (receipts) closely mirrors visitor volume. Spending \$120 billion in 2009, while visitor volume was 54.9 million.



Sources: Department of Commerce, Office of Tourism Industries; Department of Commerce, Bureau of Economic Analysis; Statistics Canada; Banco de Mexico.

Top Ten Travel Export Markets (2009)

<u>Ranking</u>		Origin Country	Total Travel Receipts 2009 (\$bil)
Visitors	Receipts		
1	1	Canada	\$16.13
4	2	Japan	\$13.05
3	3	United Kingdom	\$11.43
2	4	Mexico	\$8.05
5	5	Germany	\$5.57
7	6	Brazil	\$4.57
6	7	France	\$4.12
14	8	China	\$3.60
12	9	India	\$3.57
10	10	Australia	\$3.42
U.S. TOTAL			\$120.34

Top Origin Markets for Int'l Travelers to the U.S.

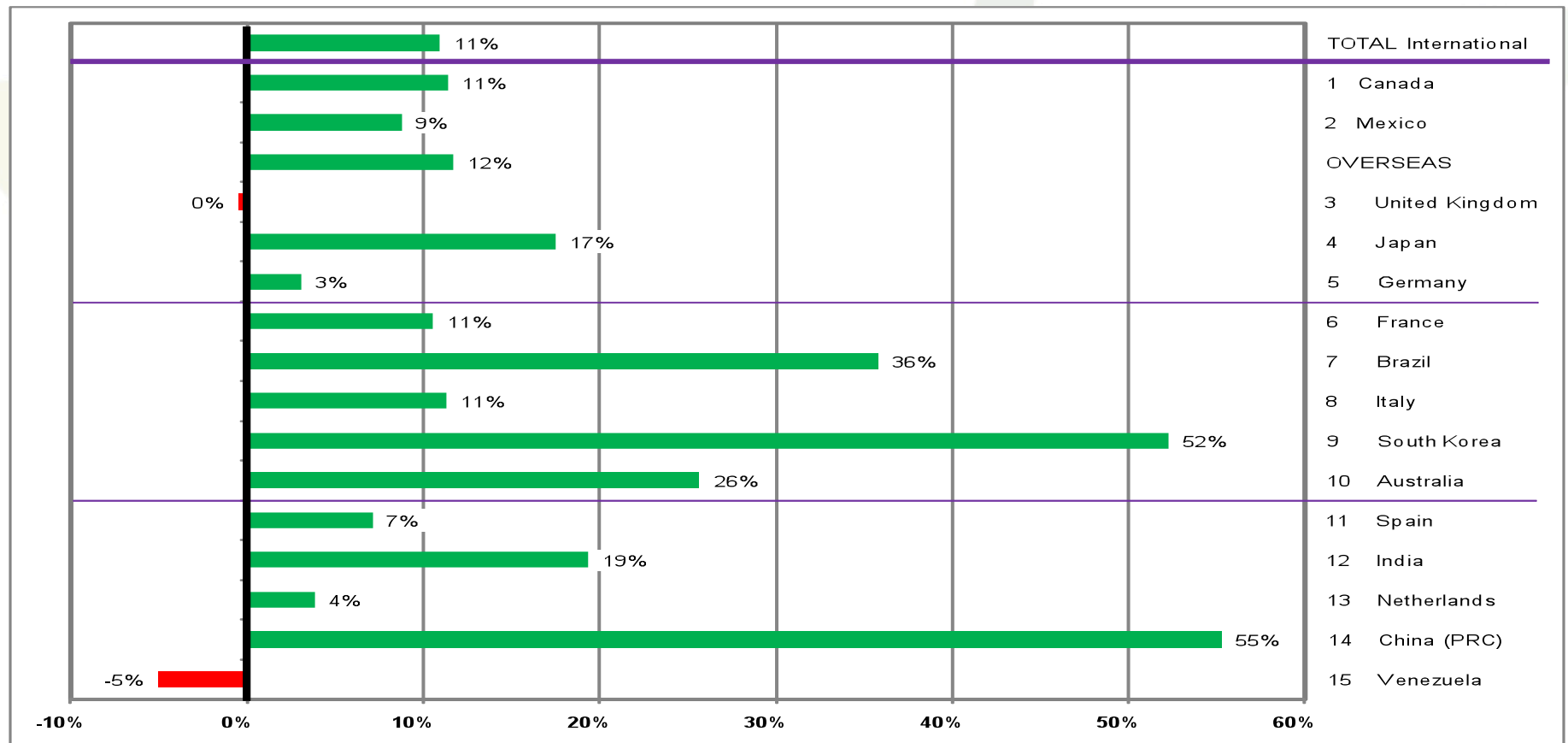
Origin of Visitor		2009 (000s)	09 / 08 (% change)	09 / 03 (% change)
International Total *		54,958	-5%	33%
1	Canada	17,973	-5%	42%
2	Mexico	13,164	-4%	25%
	Overseas **	23,756	-6%	32%
3	United Kingdom	3,899	-15%	-1%
4	Japan	2,918	-10%	-8%
5	Germany	1,687	-5%	43%
6	France	1,204	-3%	75%
7	Brazil	893	16%	156%
8	Italy	753	-3%	84%
9	South Korea	744	-2%	20%
10	Australia	724	5%	78%

* International travelers include all countries generating visitors to the U.S.

** Overseas includes all countries except Canada and Mexico.

Top Origin Markets for Int'l Travelers to the U.S.

(10 / 09 Oct. YTD)



Sources: Department of Commerce, Office of Tourism Industries; Department of Commerce, Bureau of Economic Analysis; Statistics Canada; Banco de Mexico.

Traveler Characteristics of Canadian & Overseas Travelers to the U.S.



Travel Characteristics of Canadians Travelers

Canadian to the U.S. 2009

- ◆ **Visitors:** 17.9 million (up 42% from 2003)
- ◆ **Purpose:** Holiday/Vacation-55% ;VFR-19%; Business-11%;
- ◆ **Stay length:** 7.9 nights
- ◆ **Province:** Ontario-44%; British Columbia-17%; Quebec- 17%
- ◆ **Mode:** Auto-60%; Air-34%.
- ◆ **Accommodations:** Hotel-48%
- ◆ **Timing:** Q3-32%; Q2-24%; Q1-22%
- ◆ **Activities:** Shopping-73%; Sightsee-45%; Sports/Outdoor Activities-32%; Visit Bar/Night Club-23%; Visit Historical Site-22%

Top Ports of Entry (Overseas Visitors to the U.S.)

Top Ports of Entry - Overseas Visitors to the U.S. 2003 vs. 2009

Airport	Overseas Visitors to U.S. 2003	Overseas Visitors to U.S. 2009	Point Change 2003/2009
New York	14%	17%	3%
Miami	13%	13%	0%
Los Angeles	11%	9%	-1%
Newark	6%	7%	1%
Honolulu	8%	5%	-2%
San Francisco	6%	5%	-1%
Chicago	6%	5%	-1%

Transportation Used (Overseas Visitors to the U.S.)

Transportation Used - Overseas Visitors to the U.S.

2003 vs. 2009

Mode of Transport	Overseas Visitors to U.S. 2003	Overseas Visitors to U.S. 2009	Point Change 2003/2009
Taxi/Cab/Limousine	39%	41%	1%
Rented Auto	31%	29%	-2%
City Subway/Tram/Bus	20%	26%	6%
Airlines in the U.S.	25%	25%	0%
Company or Private Auto	30%	25%	-5%
Railroad Between Cities	9%	11%	2%

Top U.S. Destinations for Overseas Visitors (2009)

Top States	Market Share	Top Cities	Market Share
New York	33.7%	New York City	32.8%
Florida	22.2%	Miami	11.2%
California	19.5%	Los Angeles	10.6%
Nevada	8.0%	Orlando	10.1%
Hawaii	7.8%	San Francisco	9.4%
Massachusetts	5.3%	Las Vegas	7.8%
Illinois	4.9%	Washington, D.C.	6.5%
Guam	4.8%	Honolulu.	6.3%
New Jersey	3.9%	Boston	4.8%
Texas	3.8%	Chicago	4.7%

¹ These percentages are based on multiple responses.

Information Sources and Trip Decision Times

Information Sources & Trip Decision Times

Overseas Visitors to the U.S.

2003 vs. 2009

Information Sources	Overseas Visitors to U.S. 2003	Overseas Visitors to U.S. 2009	Point Change 2003/2009
Personal Computer/Internet	27%	43%	16%
Travel Agency	50%	36%	-13%
Airlines Directly	19%	22%	3%
Friends/Relatives	16%	16%	0%
Travel Guides	8%	8%	0%
Corporate Travel Dept.	8%	6%	-2%
Advance Trip Decision Time	63	86	23
Advance Airline Ticket Res.	38	62	24

Selected Key Traveler Characteristics

Selected Key Traveler Characteristics Overseas Visitors to the U.S. 2003 vs. 2009

Characteristic	Overseas Visitors to U.S. 2003	Overseas Visitors to U.S. 2009	Point Change 2003/2009
First International Trip to USA	22%	25%	3%
Main Purpose of Trip - Vacation	45%	52%	7%
Main Purpose of Trip - VFR	24%	21%	-3%
Main Purpose of Trip - Business	23%	18%	-4%
Nights in the USA	16	18	2
Number of States Visited	1.5	1.5	0.0
Visitors Staying in a Hotel/Motel	77%	78%	1%

Activity Participation (Overseas Visitors to the U.S.)

Activity Participation - Overseas Visitors to the U.S.
2003 vs. 2009

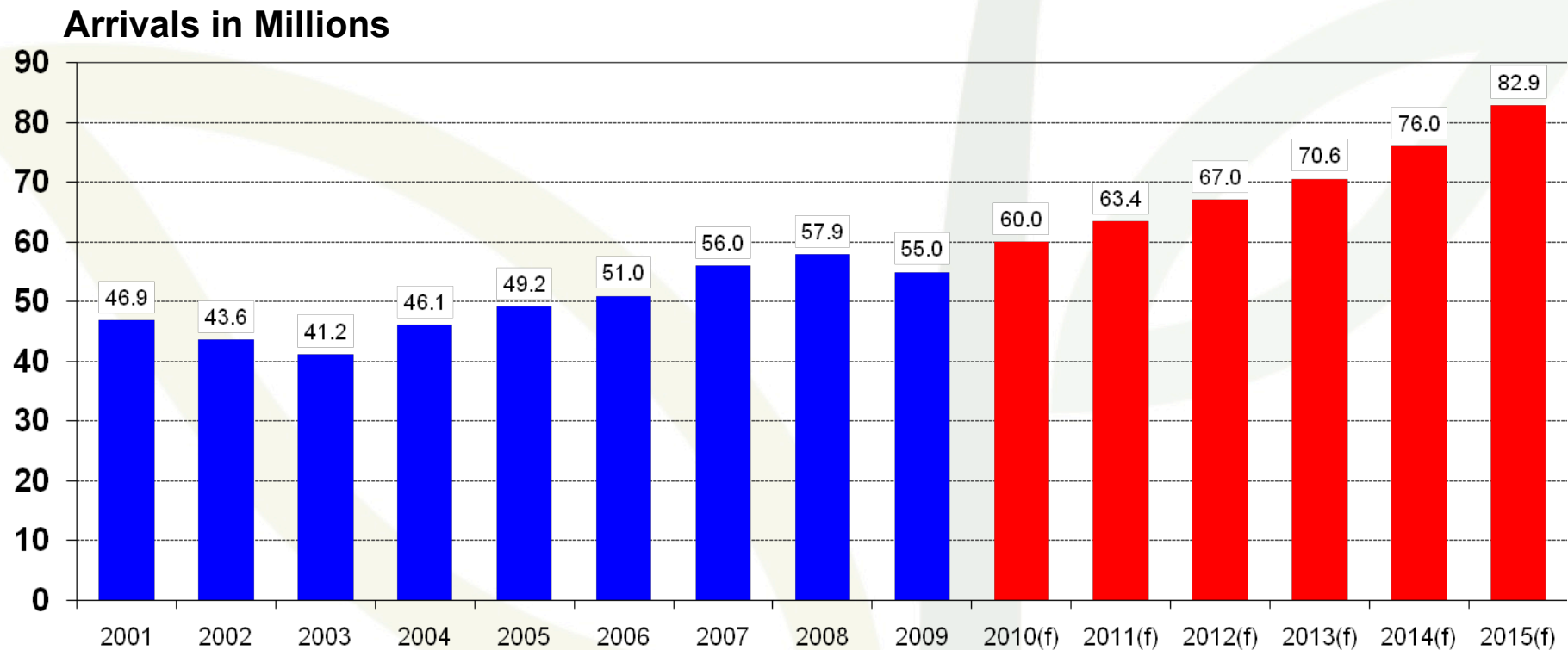
Activity	Overseas Visitors to U.S. 2003	Overseas Visitors to U.S. 2009	Point Change 2003/2009
Shopping	87%	88%	1%
Dining in Restaurants	84%	84%	-1%
Sightseeing in Cities	40%	44%	4%
Visit Historical Places	31%	39%	7%
Amusement/Theme Parks	28%	28%	0%
Visit Small Towns	27%	26%	0%
Art Gallery/Museum	18%	24%	6%
Cultural Heritage Sites	18%	23%	5%
Water Sports/Sunbathing	26%	21%	-4%
Visit National Parks	18%	19%	1%
Touring the Countryside	22%	19%	-3%

Forecasts for International Travel to the U.S.



International Visitors to the U.S. (2001-2015)

International Visitors to the U.S. Annual Projections (2001-2015)



Sources: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; Secretaria de Turismo (Mexico); Statistics Canada. -- October 2010 forecast

Short-Term Forecast for Inbound Travel to the U.S.

Visitor Origin	Actual 2009 (000s)	Change 09/08 (%)	2010f (000s)	Change 10/09 (%)	2011f (000s)	Change 11/10 (%)
Total Arrivals	54,958	-5%	59,956	9%	63,374	6%
Canada	17,973	-5%	19,760	10%	21,993	6%
Mexico	13,229	-3%	14,480	9%	15,204	5%
United Kingdom	3,899	-15%	3,743	-4%	3,781	1%
Japan	2,918	-10%	3,298	13%	3,430	4%
Germany	1,687	-5%	1,721	2%	1,772	3%
France	1,204	-3%	1,241	3%	1,265	2%
Brazil	893	16%	1,205	35%	1,410	17%
Italy	753	-3%	806	7%	830	3%
Korea	744	-2%	1,004	35%	1,185	18%
Australia	724	5%	861	19%	964	12%
Spain	597	-9%	639	7%	651	2%
India	549	-8%	632	15%	714	13%
Netherlands	548	-10%	564	3%	576	2%
China	525	6%	735	40%	911	24%

Source: OTTI - October 2010 forecast

Long-Term Forecast: Top 10 Future Markets

Inbound Travel to the U.S.

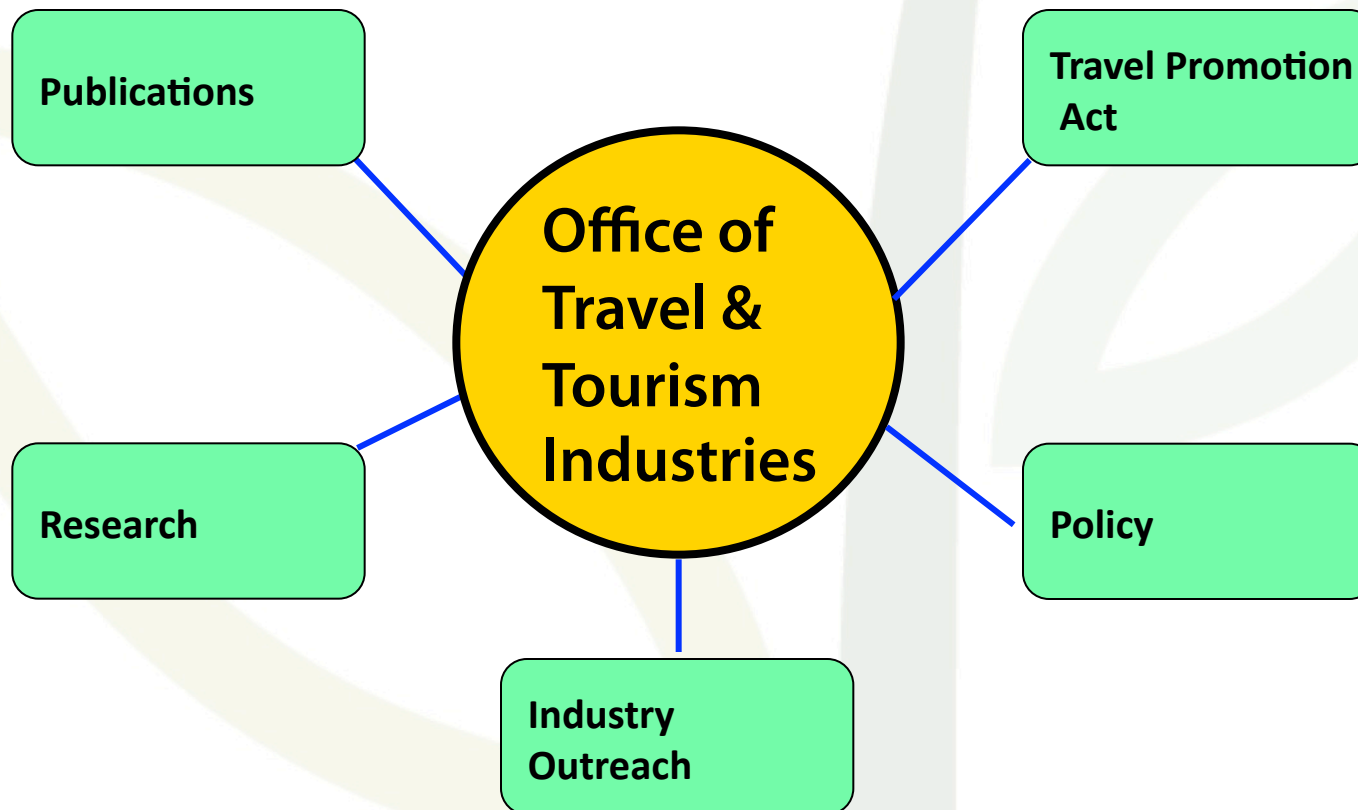
Visitor Origin (Ranked by 2015)	Actual 2009 (000s)	Change 09/08 (%)	2015f (000s)	Change 15/14 (%)	Change (000s)	Change 15/09 (%)
Grand Total	54,958	-5%	82,848	9%	27,889	51%
1. Canada	17,973	-5%	26,432	8%	8,459	47%
2. Mexico	13,229	-4%	19,742	8%	6,513	49%
3. United Kingdom	3,899	-15%	4,719	10%	819	21%
4. Japan	2,918	-10%	4,285	9%	1,367	47%
5. Brazil	893	16%	2,662	20%	1,769	198%
6. China	525	6%	2,341	35%	1,816	346%
7. Germany	1,687	-5%	2,273	12%	586	35%
8. Korea	744	-2%	2,015	20%	1,271	176%
9. France	1,204	-3%	1,566	8%	361	30%
10. Australia	724	5%	1,228	6%	564	78%

Sources: OTTI; Statistics Canada; Banco de Mexico - October 2010 forecast

Putting the Pieces Together



We Serve as the National Tourism Office for the United States of America



U.S. Department of Commerce

U.S. Department Of Commerce

International Trade Administration Tourism Resources

**Office of Travel & Tourism
Industries**

Foreign Commercial Service
151 Offices in 83 Countries

Office of Domestic Operations
105 U.S. Offices

<http://trade.gov/cs/>

<http://export.gov/industry/travel/index.asp>

Market Develop Cooperator Program (MDCP)

- ◆ The Cooperator Program provides financial and technical assistance from ITA to support projects that enhance the global competitiveness of U.S. industries.
- ◆ Partnership with ITA and non-profit industry groups like trade associations and chambers of commerce.
- ◆ Industry Groups pledge to pay a minimum of two-thirds of the project costs on sustainable projects
- ◆ Award Limits: \$500,000. Awards up to 3 years
- ◆ Announcements usually made in Feb./March each year.

Travel Promotion Act

Travel Promotion Act

- Signed by President Obama March 4, 2010
- Establishes an independent nonprofit **Corporation for Travel Promotion**:
 - To promote the U.S. to world travelers
 - To augment USG communications on entry/exit policies



Corporation for Travel Promotion

PROMOTION



Corporation for Travel Promotion

- 11-member board appointed by Secretary Locke to establish and guide nonprofit
- Promotes the U.S. internationally and clarifies U.S. travel policy and security requirements

POLICY



Office of Travel Promotion

- Serves as liaison to CTP
- Works with CTP, DHS and DOS to increase int'l visitors, create a welcoming environment and collect visitation for all states
- Supports state, regional and private-sector promotional initiatives
- Reports to Congress



Office of Travel & Tourism Industries

- Continues and expands current research :
 - Mexican data
 - Expanded int'l traveler surveys, coverage
 - State-level visitation and exports
 - Evaluation of CTP efforts
- Continues policy and industry relations functions

National Export Initiative

- ◆ **Goal:** Double exports over the next 5 years to support 2 million American jobs
- ◆ Creates Export Promotion Cabinet that will consist of leaders from top agencies
- ◆ Focuses on key areas including:
 - Increasing the number of small & medium businesses who export
 - Expand Federal assistance at U.S. trade shows with an international focus
 - Increase participation at international trade shows and missions
 - Work closer with companies and serve as advocate for exports
 - Focus more on Services exports and improve Services data

Find More U.S. International Tourism Information

The Quickest Way to U.S. International Tourism Information:

<http://tinet.ita.doc.gov>

Includes International Travel Research Online

Order, read, download & print the latest statistics on international travel to and from the U.S.

- All of the latest summary tables highlighting specific tourism trends
- More than 30 plus market and regional profiles available
- Forecast of international travelers to the U.S. through 2015
- Information on OTTI's ongoing market analysis (research) programs
- Updated monthly statistics on arrivals and departures
- Late-breaking TI News announcements and information releases
- Links and information on the Commerce, Commercial Service Travel & Tourism Team in the USA & Abroad
- Links to other organizations in the travel industry

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for the latest in tourism industry news and program updates***



Illinois Waterside Communities:

*Ways to Build, Promote and Position
Waterside Communities as
Destination Gateways*



Presented by
Jan Kostner
Deputy Director
Illinois Office
of Tourism

Illinois Tourism Strategy

The Mission of the Illinois Office of Tourism is to:

Manage visitor industry efforts that result in sustainable and significant economic and quality-of-life benefits for Illinois residents



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The Illinois Office of Tourism

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Illinois International Markets



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The Growth of Nature Based Tourism



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First Comes Product



A Confluence of Collaboration



**US Army Corps
of Engineers®**
St. Louis District



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Packaging Nature Tourism for Travelers

Explore the Mississippi River in Illinois!

Travel with us along the Mississippi River, the third largest river in the world. Explore our quaint river communities and Midwestern hospitality as you experience the scenic beauty and majesty of the Mighty Mississippi River in Illinois.

Day 1 - Galena
Hotel: Irish Cottage Boutique (\$65/night)
 Stay at a truly Irish hotel and dine at "One Eleven Main" for robust flavors and a distinct taste of the Midwest. Step back in time in hilly Galena, where fine mansions and commercial buildings are home to quaint bed and breakfasts, antique shops and restaurants. Tour the Ulisses S. Grant home or venture to Chestnut Mountain resort, featuring ski trails in winter and alpine slide in summer. Visit Galena Cellars Vineyard and Winery for a full sensory tasting experience. Lace up your hiking boots for a trip through Mississippi Palisades State Park — a nature lover's paradise offering hiking and scenic views of the river. Don't miss Fulton's famous "de Immigrant," the only working Dutch windmill in Illinois and one of only two in the nation. In Albany, hike the tall prairie grass trail to discover the Native American burial grounds dating back to 2000 B.C.

Day 2 - Quad Cities
Hotel: Radisson
 Few areas provide better views of the Mississippi River, historical natural resources and sites for recreation. In Moline, the region's agricultural heritage is showcased at the John Deere Pavilion, where visitors view modern day equipment and interactive displays about farming. Take a sightseeing trip on the Celebration Belle, the largest non-gaming excursion vessel on the upper Mississippi. In Rock Island, visit the Arsenal for its military museum and view of the river. Tour the lock and dam operation and view nesting bald eagles during the winter. Then, tour the Black Hawk State Historic Site, featuring a 200-acre nature preserve and trails, as well as the Hauberg Indian Museum. Another highlight is the Quad City Botanical Center and Sun Garden. As you head south, visit Lead Thunder Forest Preserve where you can rent a boat or ride along the horse trails.

Day 3 - Nauvoo
Hotel: Hotel Nauvoo (\$55/night)
 Take a horse drawn wagon tour through the city of Nauvoo to relive the pioneer days on the river and the tumultuous history of Joseph Smith, founder of the Church of Jesus Christ of Latter Day Saints. Don't miss the majestic Mormon Temple or the town's numerous craft shops and restaurants. Sample wine and tour Illinois' oldest winery, Bartel's Winery. Visit the Historic Nauvoo Visitor Center to view more than 25 restored homes and shops furnished with 1840s era Mormon life. At the Joseph Smith Historic Center, tour the family properties of Joseph Smith, including the homestead, mansion house and red brick shores. In Nauvoo, enjoy a quiet night along the banks of the Mississippi, all within walking distance of your hotel.

Day 4 - Quincy
Hotel: Microtel
 Quincy is filled with architectural landmarks, including the John Wood Mansion and the Villa Kathrine. Travel the streets of the East End Historic District, consisting of grand collections of restored homes from the 1850s. Built in 1835, Dr. Richard Eell's house is the oldest standing two-story brick home in Quincy and was once a stopping point on the Underground Railroad. Enjoy a beautiful scenic view of the Mississippi River amongst two acres of green grass, flowers, a gazebo and fountains at the Clat Adams riverfront park. Visit the 1930s Preserving Agriculture History Museum, showcasing the agricultural machinery that would be found in a typical Midwestern farm and farmhouse in the 1930s.

Day 5 - All Around Alton
Hotel: Pere Marquette Lodge (\$69/night)
 Thirty-three magnificent miles await on the Meeting of the Great Rivers National Scenic Byway, beginning at Pere Marquette State Park in Grafton. Continue your drive along the byway, cradled by the rolling waters of the river and majestic limestone bluffs. Stop along the way at riverside wineries in Grafton and stroll the streets of Elsie — the village where time stood still. Walk with Lincoln and soldiers from North & South on Alton's Lincoln & Civil War Legacy Trail. Measure up to Alton's Gentle Giant and the World's Tallest Man, Robert Wadlow. Stand in awe of the Mississippi River at the National Great Rivers Museum. Be a part of the Journey Westward at the Lewis & Clark Interpretive Center, and gaze out at the confluence of the Mississippi & Missouri rivers at the Lewis & Clark Confluence Tower in Hartford. There is no other place like this in America, where the Illinois, Missouri and Mississippi rivers all meet with good times in our river towns.

VisitAlton.com | greatriverroad-illinois.com

Route 66 Detour

There is a lot to see on Route 66 in Illinois, but there are many delightful detours along the way. You won't want to miss this opportunity! Detour now and venture out all around Alton, Illinois and make your first stop just 15 miles from the Mother Road. Stay a few days and let the Alton Regional CVB help plan your next delightful detour.

Sites to See:

- Cahokia Mounds
- Meeting of the Great Rivers National Scenic Byway
- Lewis & Clark State Historic Site & Confluence Tower
- National Great Rivers Museum & Melvin Price Locks & Dam #26
- Argosy Casino
- World's Tallest Man — Robert Wadlow
- Abraham Lincoln & Civil War Legacy Trail
- Historic Alton, Mansion & Underground Railroad Tours
- Fabulous Fall Colors along the Mississippi River
- Pere Marquette State Park
- Riverside Wineries
- And much more!

Plan your entire detour at VisitAlton.com or call us at 1-800-258-6645.

Planning Your Mississippi River Tour

The Western Illinois Tourism Development Office in cooperation with the Alton Regional Convention & Visitors Bureau is here to make your international journey possible. From planes to trains to plush motorcoach rides, once you touch down in Chicago, we have experienced receptives available to guide your group to the start of your Mississippi River journey from Galena to Alton, Illinois.

Alton Regional Convention & Visitors Bureau
 Meeting of the Great Rivers National Scenic Byway
 Brett Stawar, President
 bstawar@visitilton.com
 200 Plaza St. | Alton, IL 62002
 Phone: 1-800-258-6645
 www.VisitAlton.com

Western Illinois Tourism Development Office
 Great River Road in Illinois
 Roger Carmack, Executive Director
 rcarmack@macomb.com
 John Haas, Great River Road
 jhaas@macomb.com
 581 S. Deane Rd. | Macomb, IL 61455
 Phone: (877) GRR-7007
 Fax: (309) 833-4754
 www.VisitWesternIllinois.info
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The Washington Post



Advertising and Image Campaigns

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INTL Spring/Summer Banner WHERE
"Trump" 300 x 250
1 of 1

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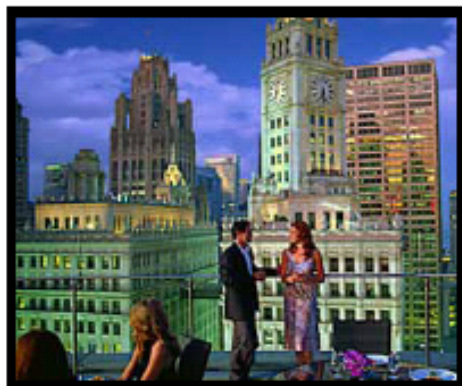
Where in the world



does a skyscraper become



a table for two?



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42

Illinois Office of Tourism - Campaigns

INTL Spring/Summer Banner WHERE
"Ledge" 300 x 250
1 of 1



What will be your
magnificent moment in Chicago?



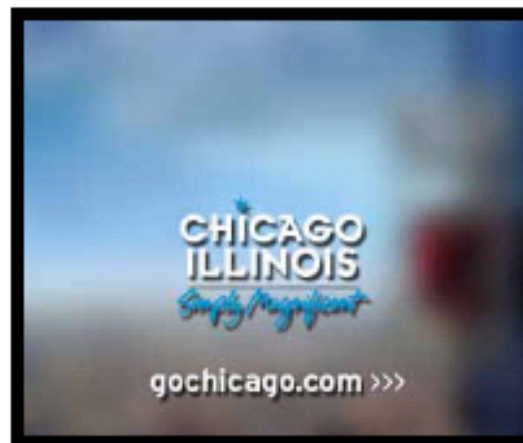
Will it be the moment



you feel like you're in the middle of everywhere?



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"Kayak" 300 x 250
1 of 1



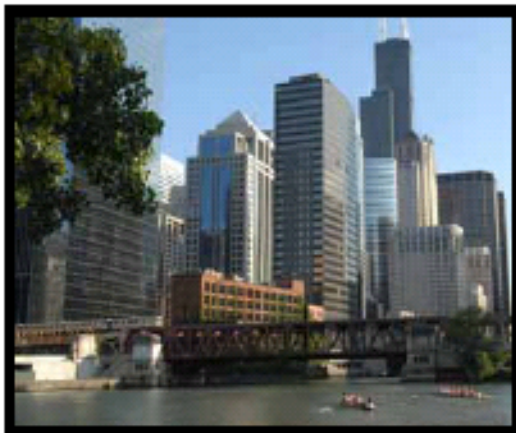
Where in the world



can you kayak



through canyons of skyscrapers?



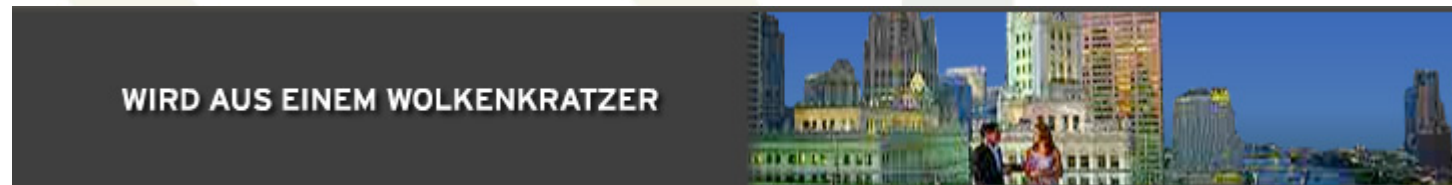
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Illinois Office of Tourism - Campaigns

Examples of Banners in German



Cooperative Partnerships



Mississippi
River
Parkway
Commission

Rocky
Mountain
Partnership

Great Lakes North America
glna.org



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Stories of Success



**Chicago
River/Navy
Pier/Tall Ships**

**Quad Cities &
John Deere**

**Alton &
Meeting of
the Great
Rivers**



Success Stories: Examples

VISION
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Tourism is Big Business in Illinois

2009 Economic Impact of Illinois Tourism

<u>Impact</u>	<u>Direct Impact</u>
Expenditures (Millions)	\$27,053.7
Employment (Jobs)	288,700
Payroll (Millions)	\$7,965.0

<u>Tax Revenues</u>	<u>Total</u>
Federal (Millions)	\$3,128.7
State (Millions)	\$1,307.0
Local (Millions)	\$643.2



A Recap of International Numbers and Figures

Illinois welcomed 1,164,000 overseas visitors, making Illinois the 7th most popular US state for overseas visitors.

Chicago welcomed 1,117,000 overseas visitors, and is the 10th most popular U.S. city for overseas visitors.

In 2009, the top markets for international visitors to Illinois were: Canada, United Kingdom, Mexico, Germany and Japan.

Travel expenditures of international visitors reached nearly \$2 billion in 2009.

International travel expenditures in Illinois directly generated 21,600 jobs in 2009.

Direct payroll for international travel generated jobs reached over \$533 million.

Tax revenue generated from international travelers (federal, state and local) reached \$360.4 million.

Moderator's Recap

A Brief Summary

- ◆ Tourism continues to grow as a vital part of our nation's economy, contributing more than \$704.4 billion to our country annually. As waterside communities lose their industrial base, heritage and nature based tourism presents opportunities for growth.
- ◆ Based on the research presented today, one of the first steps for an emerging waterside destination is to take a closer look at your assets, existing and potential product.
- ◆ Attractions, waterside communities, land managers and local businesses must form a regional vision for the destination and work through the channels of their local, state and federal tourism providers.

For More Information

Future Webinars

Visit <http://www.thehorinkogroup.org/> to view past webinar recordings and sign-up for announcements of our future webinars.

Contact Information

Moderator

Brett Stawar

President/CEO, Alton Visitors & Convention Bureau *and*
Chairman, Meeting of the Great Rivers Foundation

Phone: **618-465-6676** E-Mail: **bstawar@visitalton.com**

Presenters

Jan Kostner

Deputy Director, Office of Tourism, Illinois Department of Commerce and Economic Opportunity

Phone: **312-814-4735** E-Mail: **Jan.Kostner@illinois.gov**

Ron Erdman

Deputy Director, Office of Tourism & Travel Industries, U.S. Department of Commerce

Phone: **202-482-4554** E-Mail: **Ron.Erdmann@trade.gov**

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