

China Ready Shopping White Paper



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NEWS UPDATE OCT 2013

China's new tourism law went into effect this month and requires tour operators to specifically state the shopping center(s) and outlet(s) their guests will visit. Prior to this they only stated "time for shopping." The change will help to discourage Chinese groups from being directed to sub-par shopping experiences. It also reinforces the need for Shopping Centers, Destinations, Brands and Outlets to market themselves as "China Ready" to roll out the red carpet. Increased marketing via tour operators and direct to Chinese consumers is anticipated.

ENT Global Travel Industry News reports: "The new law stipulates that travel agencies cannot deceive tourists into buying tour products with low prices and later earn profits through shopping trips or extra fees." This law may also serve to discourage the practice of paying retail incentives to tour guides in exchange for group visits. We will continue to monitor and update this White Paper with relevant news.

1. Introduction

Shop America Alliance in partnership with National Tour Association (NTA) organized the China Ready Shopping Task Force in 2012. See list of participants and white paper contributors on page 14. The Task Force objectives were to:

- A. Identify opportunities and discuss challenges
- B. Educate and inform retailers, shopping centers, tour operators and travel professionals on China Ready Shopping
- C. Optimize the Shopping Travel experience for Chinese Travelers throughout North America

The Task Force participants generously contributed information, ideas and direction to this White Paper on China Ready Shopping to develop an industry wide resource, available free of charge for download in PDF format at

ShopAmericaTours.com. In addition, members of Shop America Alliance and/or NTA can access the PPT version of the White Paper to be used for educational purposes. This White Paper was previewed at the ONE Travel Conference for Shopping, Dining and Cultural Tourism in February 2013 and published in April 2013.

China Ready Shopping essentials include

- Commitment to offering highest quality goods and services
- Provide a welcoming shopping experience for Chinese guests
- Group tour services including Meet & Greet
- Information in Mandarin—print and online
- Access to Mandarin speaking staff

2. The Opportunity

Source: Travel Market Insights

China is the world’s fastest travel growth market and among the top shopping tourism markets.

Top 5 High-Growth Markets for inbound travel to the U.S. through 2016 (forecasted growth 2010 to 2016, Source US Department of Commerce/OTTI)

China 305%

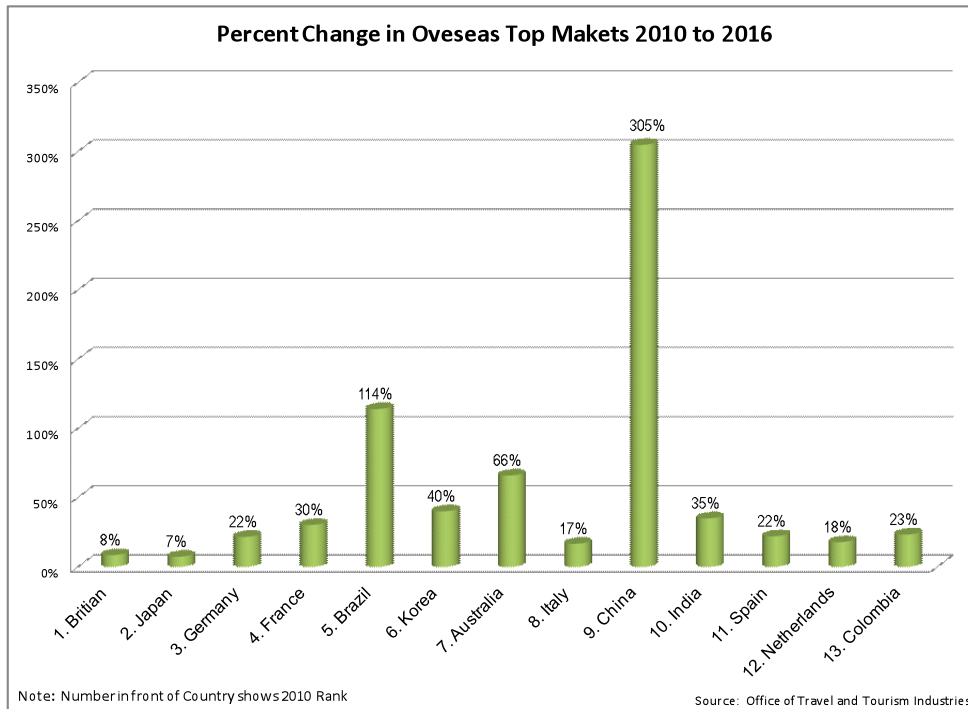
Brazil 114%

Australia 66%

Russia 49%

S. Korea 40%

India 35%



The world is competing for the export dollars created by Chinese tourist expenditures. North America's leading retailers have the opportunity to benefit provided they understand and cater to this important market segment. Chinese travelers coming to North America are middle to upper income, brand savvy shoppers with strong demand for fashion, luxury and electronic items.

The opportunity for retailers to capture a share this impressive market and produce incremental sales is the topic of this white paper. The challenge is that Chinese shoppers and tour operators exhibit unique cultural and business behaviors that necessitate a different approach to business.

First Mover Advantage

Source: Stephen Russell, China USA Travel Inc.

Retailers who are the first to understand the Chinese customer's expectations and preferences could gain a permanent advantage. The first wave of Chinese visitors to the US will recommend or condemn service suppliers to family and friends based on their personal experience. This word of mouth marketing will make the malls, stores, hotels, restaurants, tour guides, theme parks and other attractions that meet Chinese customer expectations the first choice that competitors will have to overcome.

North American Retailers, in competition with the rest of the world's retailers, can become the first choice of Chinese travelers.

More sophisticated travelers

Chinese tourists have become more interested in themed, in-depth travels and authentic local experiences. They are paying more attention to both product quality and value. Gradually, the price-driven, city/country-hopping tours, which used to be fairly popular, have been replaced by experience-oriented tours. Chinese tourists today are more comfortable with online booking, credit card usage, and independent destination choices. Many of them are technology savvy and use the Internet and social media in product and brand decisions. In a market with almost infinite product diversity and availability, Chinese tourists' demands for more niche, customized products has become greater than ever. They also have a higher expectation for Chinese language environments and services.

Industry veterans frequently compare the current Chinese tourist boom to what happened in the 1980s, when the influx of Japanese tourists changed the world's tourism landscape in many aspects. Considering the sheer size of the Chinese market, and their spending power, it is no wonder a *Newsweek* article asserted that "Chinese tourists are poised to lead the world into a new era of adventure and spending"¹⁴. Just as many Chinese tourists start venturing overseas for the first time in their life, many Western businesses are hosting their first Chinese guests and exploring new products and new business models in a new market. The learning curve is undoubtedly deep, but the rewards could be amazingly high.

3. The Market

Source: Bruce Bommarito, Bommarito Global Strategies

The People's Republic of China has been the fastest growing economy in the world over the past twelve years. With a population of 1.33 billion, it has a growing middle class now well over 400 million, increasing at a rate of over 10% annually. The middle and upper class are ready and able to travel. Travel in China was restricted for decades during the Cultural Revolution, but now it is encouraged by the government at all levels. It is considered one of the five pillars of the economy and a tool of both education and diplomacy. While the Chinese are inclined to travel to the U.S. for many reasons, Shopping remains the number one expenditure.

In September 2012 at the U.S./China Tourism Leadership Summit, Chairman Shao Qi Wei from CNTA predicted travel to the U.S. from China to exceed 5 million annually in the next few years. In the most recent statistics provided by The China Tourism Academy, while sightseeing is the number one reason to travel, shopping is the number one expenditure.

Chinese Travel Demographics Reported Mid 2012:

2010 Outbound Travelers: 57.39 million

2011 Outbound Travelers: 63.00 million
2020 Outbound Travelers: 100 million (projected)

Current major destinations

1. Hong Kong
2. Macao
3. Japan
4. S. Korea
5. Taiwan China
6. S. Korea
7. USA
8. Malaysia
9. Thailand
10. Singapore

Recent Growth

- To United States: 2011 - 1.1 million visas & 1.3 million trips
- 2012 YTD in June: 1 million visas issued

Chinese Travel Demographics Released September 2011:

- *Ages 25-44: 64%*
- *Education: Bachelor's (or Dazhuan) Degrees 70%*
- *Gender: 47% Female 53% Male*
- *Monthly Income:*
 - 0 to 3,000 RMB **15.93%**
 - 5,000 to 10,000 RMB **73.47%**
 - 10,000 RMB and above **10.6%**
- *Reason for travel:*
 - Sightseeing **49.30%**
 - Leisure/vacation **33.48%**
- *Travel companions:*
 - Family **46.98%**
 - Friends **23.8%**
 - Company and class associates **13.66%**
- *Travel Information Sources:*
 - Website **57.41%**
 - Recommendations from family and friends **47.02%**
 - Print media **30.96%**
 - Travel Agencies **23.57%**
 - TV/Video **19.46%**
 - Destination Promotions **13.46%**
- *Trip Spending Per Capita:*
 - Shopping **32.24%**
 - Transportation **20.96%**

Doing Business with China:

China is a unique culture and economy, and it can be difficult and time consuming to navigate its bureaucracy. With the proper approach and relationship building, however, the establishment of business from there can be significantly expedited.

The Chinese are rapidly embracing every aspect of capitalism and want to work with Americans on many levels. They are, however, still somewhat encumbered by traditions of the old system of influence and side deals. The ability to select the right partners, suppliers and operators of high integrity and appropriate credibility is essential.

The Chinese are a cash centered society with a national average saving rate of over 51%. Their pay structure including benefits is unlike the U.S. and it is not uncommon for a job to include lodging, clothing, food and transportation. Because of these factors, Chinese have the ability to travel at much lower income levels than one might expect. Travelers while conservative on some items are extravagant spenders in others. The key is to understand the motivators and maximize your target marketing strategies. The Chinese traveler has preferences like any other, and can be easily met with the proper understanding.

4. The Changing Chinese Traveler

Source: Jens Thraenhart, CEO, Dragon Trail

The Chinese middle class is already larger than the entire population of the United States. In 15 years, the Chinese middle class will reach 800 million, from 300 million today. Over the next five years, affluent Chinese consumers will grow from four million to 20 million. These numbers have changed, and will continue to change, the dynamics of the world we live in and will have huge impacts on the global travel and tourism industry.

Chinese demand for international travel is still not large. But it is expected to grow by 17 percent annually over the next decade, driven by rising incomes and aspirations. There will be an average of 25 million first-time Chinese travelers every year, or 70,000 every day, for the next 10 years. International travel from China should become a major source of growth for travel suppliers in destination countries for the Chinese market. An increasing number of second and multiple- time Chinese visitors are more likely to travel independently, instead of as a group, meaning that they have a greater choice of timing and destinations. They have the opportunity to explore “off the beaten track” venues and can look for holidays and activities that suit their personal interests.

The rise of Chinese tourism has gotten the attention of a lot of travel and tourism companies. Big U.S. hotel chains such as Starwood, Hilton, Marriott and InterContinental have announced programs designed especially for Chinese travelers. These include adding popular Chinese dishes to full-service restaurant

menus (including a traditional Chinese breakfast), featuring one or more Chinese television stations in the guestrooms, and introducing guestroom amenities such as slippers, tea kettles, and a selection of Chinese teas. Some hotels also have added a front desk concierge who speaks fluent Mandarin.

With all that said, the start of the second wave of China's outbound tourism will change Chinese travelers as we know them today. These "new Chinese tourists" entering the scene are knowledgeable, sophisticated, technology-savvy and predominantly below 45 years of age. New Chinese tourists look for deeper experiences and closer contact with local host populations during their self-organized trips. Where they once took photos of themselves in front of the Sydney Opera House or the Eiffel Tower, they are now drawn more to new places and activities. New Chinese tourists offer an increased chance for destinations and tourism service providers who are off the beaten track to get a piece of the Chinese outbound market.

Many travel brands are trying to capture the attention of this very valuable new customer segments, but not without challenges and disappointments, due to a number of reasons. First, the way many Chinese consumers are finding out about new destinations and travel services, such as hotel or cruise brands, is through the Internet. With more than 500 million Internet users in China as of December 2011, more than 80 percent of Chinese travelers research and educate themselves about destinations and brands online.

Second, unlike in the West, most of the money in China belongs to people who are younger than 45. Because of the Cultural Revolution in the 1960s and 1970s, people older than 45 generally aren't well educated, live in government subsidized housing and have spent the bulk of their careers in state-owned enterprises. In contrast, the younger generation is better educated and is more likely to work in private firms, including foreign-invested enterprises.

In addition, the fastest growing millionaires are in third-, fourth- and fifth-tier cities (including Dalian, Chengdu, Xiamen, Kunming, Nanning, etc.) and about 50 percent of the wealthy were not classified as wealthy four years ago. Seventy percent of them do not live in the four biggest cities (Shanghai, Beijing, Guangzhou and Shenzhen) and 35 percent do not live in first- or second-tier cities.

Third, a structural change is happening in the way Chinese travel. A recent study by the Boston Consulting Group revealed that 95 percent of Chinese travelers are unsatisfied with the current travel products and services, both domestic and outbound. Group package deals are still being chosen by most of the middle class, especially those not from first-tier cities who have mixed feelings of travelling abroad (those who are a little fearful due to food and language difficulties). But post-1980s and 1990s young adults are not following the tour guide's flag in the same way. There is a rise in independent, self-

organized travelling, albeit still in small groups, for those interested in experiencing foreign cultures, reflecting on it with their own education and perspectives.

The incomes of Chinese in second-, third- and fourth-tier cities are rising due to a change in consumption patterns that will drive market dynamics in unprecedented and unpredictable ways. Chinese consumers are at the forefront of tech and digital trends and are greatly increasing their use of computers and mobile phones to research and purchase. They also are being influenced increasingly by digital and social media marketing. Ninety percent of respondents to a 2011 Forbes survey, which was comprised of more than 300 China-based senior executives, said that digital and mobile marketing are a critical part of the mix for reaching Chinese consumers, especially the younger and affluent demographic.

Understanding the new Chinese tourist, the changing demographics and consumer behavior, is critical if global travel and tourism companies are to be successful in China.

5. Importance of Shopping

Sources: Travel Market Insights, TaxFree Shopping LTD, Mandala Research, i2i Group

TODAY'S CHINESE TRAVELER

- Top Markets: Group, FIT (independent), MICE (meetings and incentives)
- Top Destinations: LA, SF, NYC, LV, Boston, DC
- Connected 700M Chinese online, 1.1 billion mobile phones
- Shopping is ESSENTIAL--gift buying, fine jewelry/watches
- Group Travelers, itinerary determined by tour op, moderate hotels

Travel Market Insights reports that Chinese travelers to six cities: LA, San Francisco, New York, Las Vegas, Boston and Washington DC in 2011 spent \$1.4 billion on shopping and that number is projected to reach \$7.09 billion in 2017.

As tracked by the China Travel Trade Barometer, 96% of Chinese plan to shop when they visit the USA. It is their #1 activity.

Product Intent Summary Table

	Average	↑	NC	↓
Larger major destinations	Higher	96%	4%	0%
Shopping	Higher	96%	4%	0%
Smaller secondary destinations	Higher	92%	4%	4%
City center lodging	Higher	92%	8%	0%
Family Travel	Higher	88%	12%	0%
First class accommodations	Higher	88%	12%	0%
Amusement/theme parks	Higher	81%	19%	0%
Natural scenic parks and destinations	Higher	81%	19%	0%
Self driving	Higher	77%	19%	4%
Local people and culture	Higher	73%	27%	0%
Beach destinations	Higher	69%	27%	4%
Weddings/Honeymoon	Higher	65%	31%	4%
Historical/cultural destinations/sites	Higher	62%	38%	0%
Travel to world heritage sites	Higher	62%	35%	4%
Budget accommodations	Higher	58%	42%	0%
MICE	Higher	54%	46%	10%
Golf destinations	Higher	54%	38%	8%
Mountain destinations	Higher	50%	42%	8%
Ski destinations	Higher	50%	42%	8%
Casino/gambling	No change	38%	58%	4%

Note: The average excludes respondents that had no comment.

Specifics on what Chinese Shop for in terms of brands, retailers and products, and spending levels, has been detailed in the Mandala Research “Emerging International Markets 2011” study. The average Chinese traveler spent \$3256 per person per trip an \$941 on shopping.

Markets shopped per this study included:

- Houston 23%
- New York 19%
- Las Vegas 17%
- Los Angeles 11%
- Orlando 11%
- Philadelphia 7%
- Buffalo NY 6%
- Chicago 5%
- Honolulu 4%
- Boston 4%

More robust spending is reported by TaxFree Shopping Texas (TFS), the state licensed customhouse broker service that refunds sales taxes to international visitors. They operate refund centers in major malls, retailers such as Macy's and Best Buy and in international airports in Houston and Dallas. TFS tracks retail spending by nationality and store. During the past two years TFS has been marketing to Chinese market. China is now their number two customer only second to Mexico, growing from 4% of total TFS refunds to over 20% of business in two years. Mexico is still 40% of TFS business in Texas. Average Spend Shopping per TaxFree Texas Chinese shopping customer: \$3000.

Top Brands per TaxFree Texas:

Apple
Louis Vuitton
Tiffany
Cartier
Gucci
Chanel
Hermes
Macy's
Saks
Victoria Secret
Best Buy
Nordstrom
Polo Ralph Lauren
Banana Republic/ Gap/ Old Navy
Kenneth Cole
Source: TaxFree Shopping Ltd.

Luxury Shopping

Analon Luxe World reports that China is the largest consumer market in the world (1.3 billion) with 189 billionaires and over 960,000 millionaires in USD. They spend \$6,000 USD per trip on luxury goods and destinations. They are investing 30% of their wealth into real estate. China's cash-rich property investors are now touring the world looking for high-quality homes, safe investments and luxury lifestyle. The New York Real Estate Market is the number #1 market where the Chinese invest according to The Wealth Report.

Delivering Connections reports:

High propensity to spend – Chinese spent over \$54 billion abroad in 2012 – average spend per head while in USA - \$7,200. Chinese travelers cite shopping as one of their key activities while travelling – shopping/cultural pursuits/visiting family. China's wealthy elite have generated a whole new market for the world's luxury personal goods makers, estimated to be worth \$25 billion a year - likely to leapfrog Japan and the United States to the \$28 billion top spot by 2015.

i2i Group Reports:

Luxury Sales In China = 10% Of Global Sales
2020 China Will Be The Largest Luxury Market – 44% Of Global Sales
50% of All Chinese Luxury Spending Is Abroad
25% of Tours to France and Italy
50% Are Women

The top competitors for China Shopping in North America are France, Italy and London. I met with the owner of Gray Line Shanghai at a conference in NYC and he shared: “I just returned from Woodbury Common Premium Outlets where I purchased 11 Armani suits and luggage to pack them. My wife also shopped a lot!” He added: “We would have spent more but last week we were shopping in Paris.”

6. Challenges and Recommendations for Success

China is the fastest growth shopping travel market worldwide. There is high demand for luxury brands, yet Chinese customers do not behave the same as traditional luxury customers due to a number of cultural factors.

Affluent Chinese will stay in 3-star hotels and travel on value priced bus tours, yet plan to spend thousands of dollars on shopping. Tour Guides dictate the Chinese group travel itineraries, with limited time for shopping. Motor coaches full of Chinese travelers arrive at a shopping center, retail store or outlet with only a short time slotted for shopping and serious determination to acquire special items not only for themselves but as gifts for family, friends or their boss. These shoppers feel stressed and rushed. With cultural and language issues, it is challenging for the retailer to serve them properly.

Chinese travelers are likely to be casually dressed. Chinese shoppers can behave aggressively and do not perceive this to be rude. In some Coach Outlet stores, they have limited the number of Coach Bags each Chinese shopper can purchase, as they will totally deplete the inventory. They also like to bargain and consider this part of their normal shopping behavior. Interestingly, price is not a major issue as US luxury brand goods are already a bargain compared with similar goods in China.

There is a need for cultural sensitivity on the part of the retail sales team. Service is very important to the Chinese guest, as is assistance by Mandarin speaking staff.

This situation is exacerbated by pressure from tour operators/guides for incentive payments, usually a percentage of the sales. As this is atypical in North America retail, it has become a serious concern for some shopping centers, retailers and Convention & Visitors Bureaus dealing with the Chinese market. Some Chinese tour guides believe that these incentives are a part of their income and see this practice as business as usual. They can be quite aggressive in this area and

have been known to divert business to retailers who cooperate with incentives.

Based on feedback from the Task Force, there are several scenarios for dealing with this issue:

A. Cultural Understanding: What may be perceived as a “kick-back” in the US is an acceptable business practice in other parts of the world and may be part of the marketing strategy.

B. Contracting Incentives: Some luxury retailers have established incentive systems with contracts and W-9s to facilitate payments to tour guides and receptive tour operators. It is important to operate the commission incentive business in full compliance with local and federal law. Retailers who do this report paying 5% to 15% commission on a scale based on volume, with 10% being the standard on qualified sales.

“We are happy to pay 10% to a tour operator who brings us a \$15,000 sale” said a SF based luxury retailer. “The Chinese business brings in millions of dollar in sales, so we work with the tour operators” said a NY luxury retailer. Both requested confidentiality.

ImmixRed is a company that provides a Tour Guide – Luxury Retailer partnership program acting as intermediary between approximately 800 tour guides in Los Angeles, Las Vegas, New York, San Francisco and Hawaii and dozens of luxury retailers that pay commissions. These guides handle hundreds of thousands of Chinese tourists and business travelers every year. ImmixRed’s program offers luxury retailers a platform for connecting with these guides and their customers in an organized way, without assuming any risk. The average sales per group are reported to be \$15,000. More info at www.tourguidesite.com.

Not all retailers can or will pay commissions or incentives and this is strictly an individual business decision. Chinese tour operators understand that their clients love to shop and expect to have a quality shopping experience, so that needs to be the primary focus.

C. Shopping Centers’ Role: Shopping Centers are not structured to provide commission incentives but play a key role to assuring a quality shopping experience. Tour operators need to understand that the shopping centers’ or outlet centers’ role is to provide education and information about their retailers and restaurants and discounts and/or gifts with purchase. They also make introductions, as well as provide services like Meet & Greet, motor coach parking, Group Tour welcome areas, drop off and pick up. They produce special events, coordinate programs like China Union Pay, and provide Mandarin marketing materials, Mandarin signage and in some cases Mandarin speaking staff. The CVB is also a good source of marketing information and introductions for tour operators.

D. Shift from Group to FIT: The shift from group travel to independent travel (FIT) will change the incentive business over time. Some experts believe that this will occur quickly as the younger (under 45), affluent, educated Chinese traveler is the power shopper and is already comfortable with independent travel in small groups with family and friends and will shop on their own. Similarly, business travelers use their free time to shop independently. Within 5 years, the incentive demand issue should diminish to some degree.

E. Quality = Win/Win: The quality of the shopping experience and the goods is the #1 point to communicate, regardless of whether a retailer elects to pay commissions or not. Reputable tour operators, retailers and the Chinese government want to assure the overall quality of the guest experience. Insuring that the retail goods are top quality (not knock-offs) and that the Chinese guests are afforded quality service are of areas of paramount importance. Retailers are advised to promote their brands, quality and service when it comes to the Chinese market. This will provide success and repeat business from brand loyal Chinese. It will also contribute to important word of mouth and social media marketing, as the Chinese will share their positive shopping experiences.

7. Developing A China Ready Plan

As in all tourism marketing, it is important to develop a strategic and long-term plan to maximize the Chinese Tourism opportunity. Quality and service are critical. Cultural sensitivity is essential. The Chinese are avid and savvy shoppers who can be counted upon to exhibit higher than average spend and brand loyalty, rewarding those retailers who are China Ready with exceptional incremental business.

Recommended tactics for maximizing success with the Chinese market include:

- A. China Union Pay Card
- B. In-Market Reps
- C. Tour Guide/Tour Operator Relationships
- D. Pre-Arrival Awareness media in China
- E. Online and social media in China
- F. Staff Training, special services catering to Chinese travelers
- G. Special Seasonal Events targeted to Chinese Travelers

- H. Communications in Mandarin
- I. Partner with Shopping Center Tourism team, CVB, state tourism office, Shop America Alliance and NTA for market intelligence, research data, trade shows, marketing opportunities

8. China Ready Shopping Task Force

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BRIC Marketing Group • BRIC.Travel

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Mandala Research • Laura@mandalareserch.com

National Tour Association (NTA) • ntaonline.com

Travel Market Insights • Travelmi.com

US Cultural & Heritage Tourism Marketing Council
TheCulturalTraveler.com • uscht.com

US Department of Commerce/Office of Travel & Tourism Industries •
inet.ita.doc.gov

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Shop America Alliance LLC (SAA) is the travel trade organization representing hundreds of the premier shopping tourism destinations, retailers, shopping centers, museum stores and outlets in North America. Founded in 1998 and focused on tourism, Shop America Alliance co-produces the annual ONE Travel Conference, SASI-ONE Awards and The Cultural Traveler guide, publishes Shop

America Magazine and markets more than 185 Shop America Tours Package in 40 cities. For more information call 707-224-3795 or visit ShopAmericaTours.com, TheCulturalTraveler.com, ONEtravelconference.com or OutletFestival.com.

Please contact Shop America Alliance for more information. Thank you.