



The Economic Impact of Tourism in Guam

Tourism Satellite Account
Calendar Year 2015

July 2016

Today's talk

- Recent visitation and spending trends
 - Korea shines, Japan moderates
- Tourism spending and impacts
 - \$3,000 per minute
 - Employment equal to the number of streetlights on Guam
 - Tax revenue per household equal to the cost of tuition at UOG
- The Road to 2 million
 - Newly paved or more like the road to Ritidian Point?

Highlights

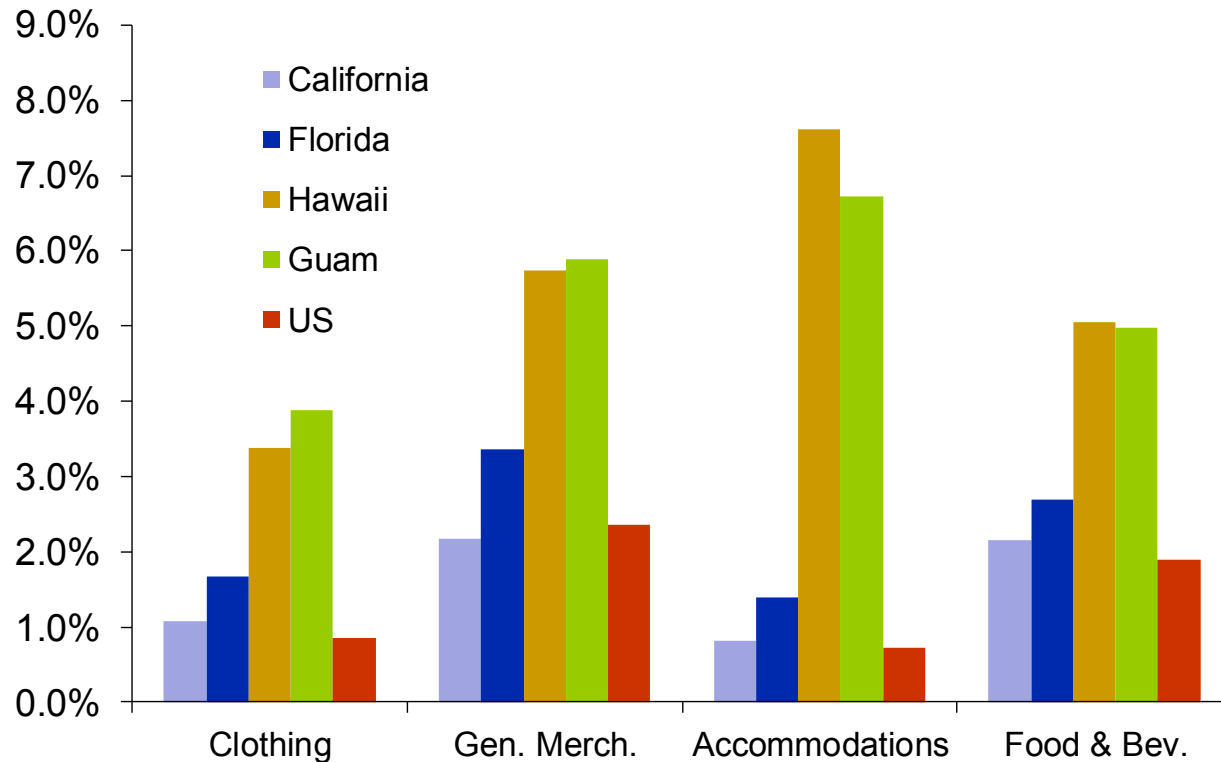
- Visitor spending reached \$1.6 billion in 2015, growing 6.8%.
- In 2015, total tourism economy sales in Guam tallied \$1.7 billion.
- Visitor spending supported nearly \$2.3 billion in business sales on Guam.
- More than 20,300 jobs, with associated income of \$590 million, were sustained by visitors in 2015.

Highlights

- These jobs represent 33% of total employment in 2015; 1-in-3 jobs in Guam is sustained by visitor spending.
- Including indirect and induced impacts, tourism in Guam generated \$245 million in taxes last year.
- In the absence of the state and local taxes generated by tourism, each Guam household would need to pay \$4,840 to maintain the current level of government services.

Tourism importance – industry perspective

Share of Economy by Industry



Source: 2012 Economic Census

- It is not just the visitation data that shows the importance of visitor spending on Guam but also industry data. Tourism-centric industries have a large presence on Guam.

A Quick Introduction

Tourism Economics

**Union of industry
expertise and
economic disciplines**

**Real world insights
based on quantitative
frameworks**



Key Partners

DMAI – together provide the DMAI Event Impact Calculator to DMOs



Smith Travel – Tourism Economics partners with Smith Travel on their hotel forecasts



US Travel – together conduct a twice-annual forecast of the US Travel industry



AGA, Brand USA, IATA and more

100s of DMOs and CVBs

Who we work with



Key Origin Markets – recent performance



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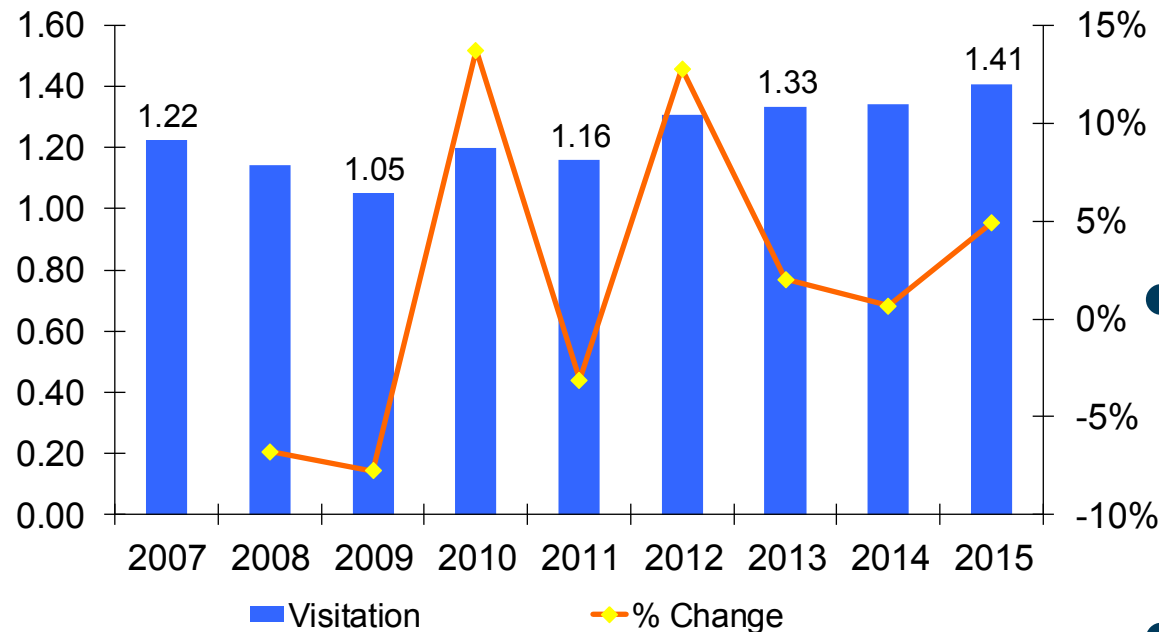
Top recent trends

- Visitor counts up 250,000 to 1.4 million since 2010.
- Diversification away from Japanese dominated to Korean becoming minority partner.
- Japanese visitation to Guam influenced by outside forces.
- Korean visitation to Guam outpacing outside forces.

Visitor trends

Guam Visitor Totals

Millions of Visitors



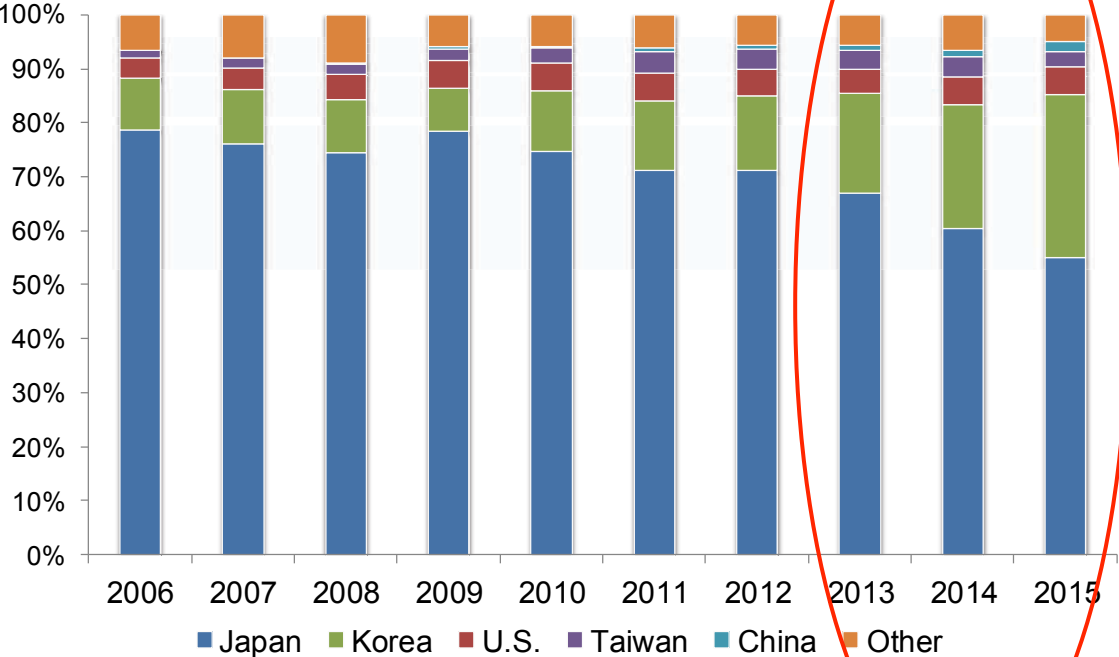
Source: GVB

- Visitation jumped around early in the decade sandwiching two years of 10%+ growth around a 3% decline in 2011.
- 2013 and 2014 saw small visitation increases with a larger jump in 2015.
- Visitation in 2015 surpassed 1.4 million.

Visitation by market

Guam Visitation

share of total



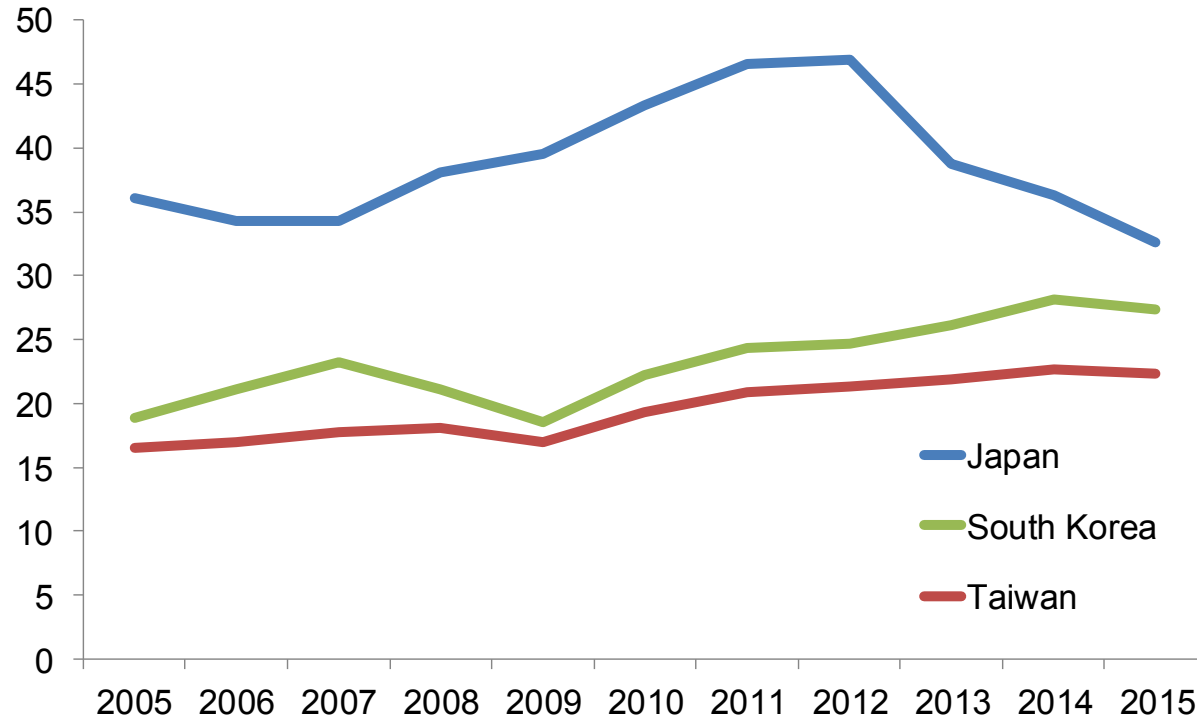
Source: Tourism Economics

- Japanese visitors remain the largest origin market, comprising 55% of all visitors in 2015.
- South Korea visitation has grown more than 300% in the last five years and now makes up more than 30% of all visitors.
- Domestic visitation remains around 5% of all visitors to Guam.

Is it me, or is it you

GDP per capita, nominal, US\$

Thousands



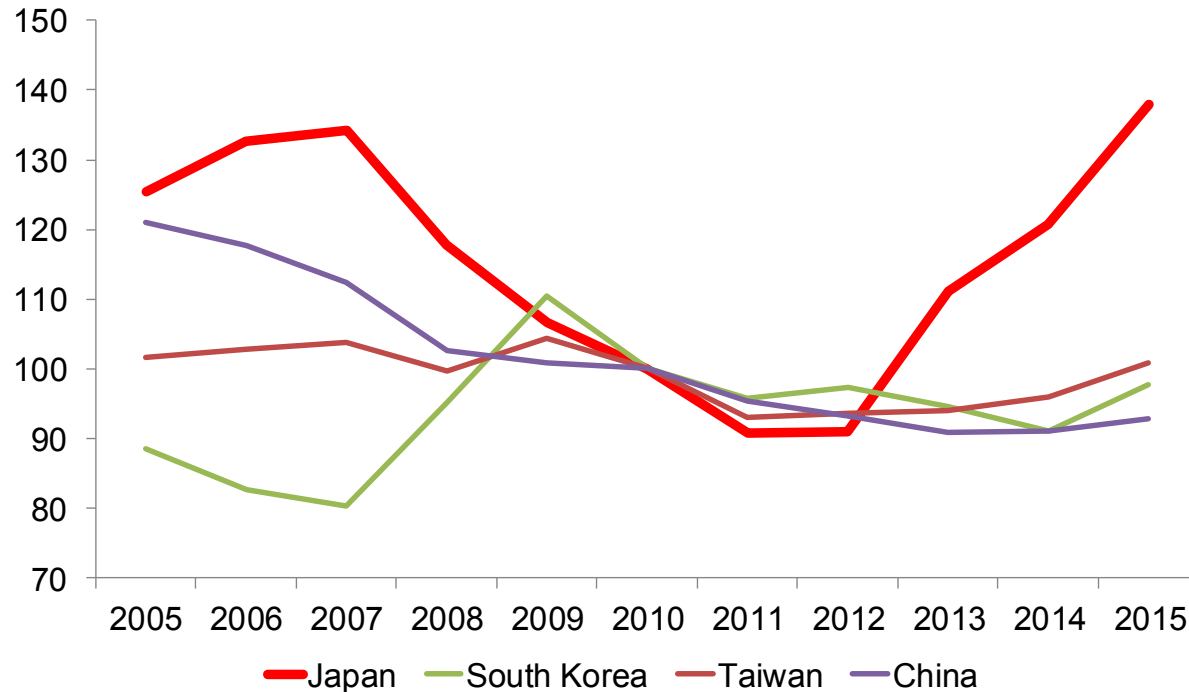
Source: Oxford Economics

- In Japan, per capita GDP has declined over the past three years while growing slightly in other key origin markets.

Is it me, or is it you

Exchange rate

Index, 2010=100



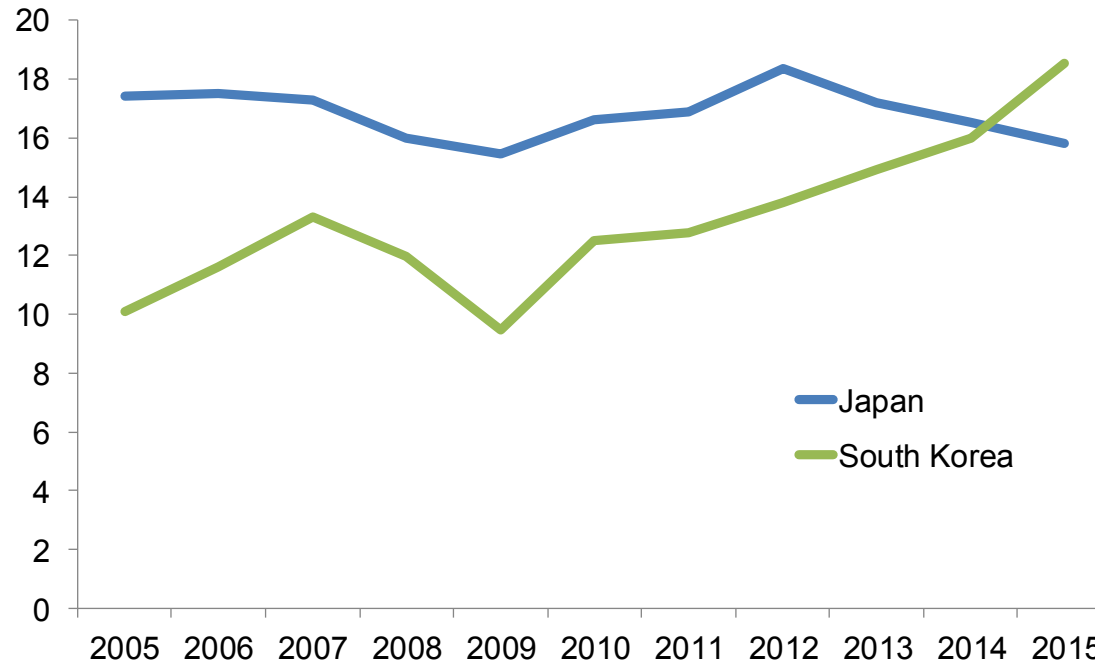
Source: Oxford Economics

- It gotten more expensive for Japanese visitors to travel to the US while other origin markets exchange rates have been stable.

Is it me, or is it you

Total Departures

Millions

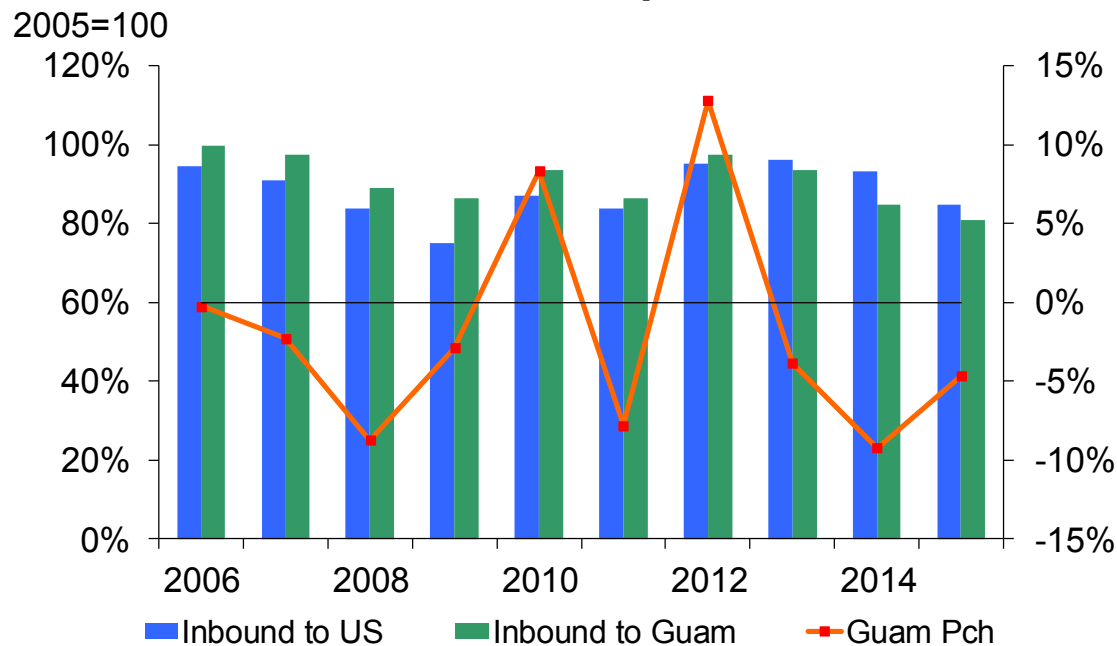


Source: Tourism Economics

- With the combination of lower growth at home and travel becoming more expensive, Japanese outbound numbers have declined.
- Korean departures have jumped recently.

Perspective on the Japanese market

Visit Share and Growth - Japan

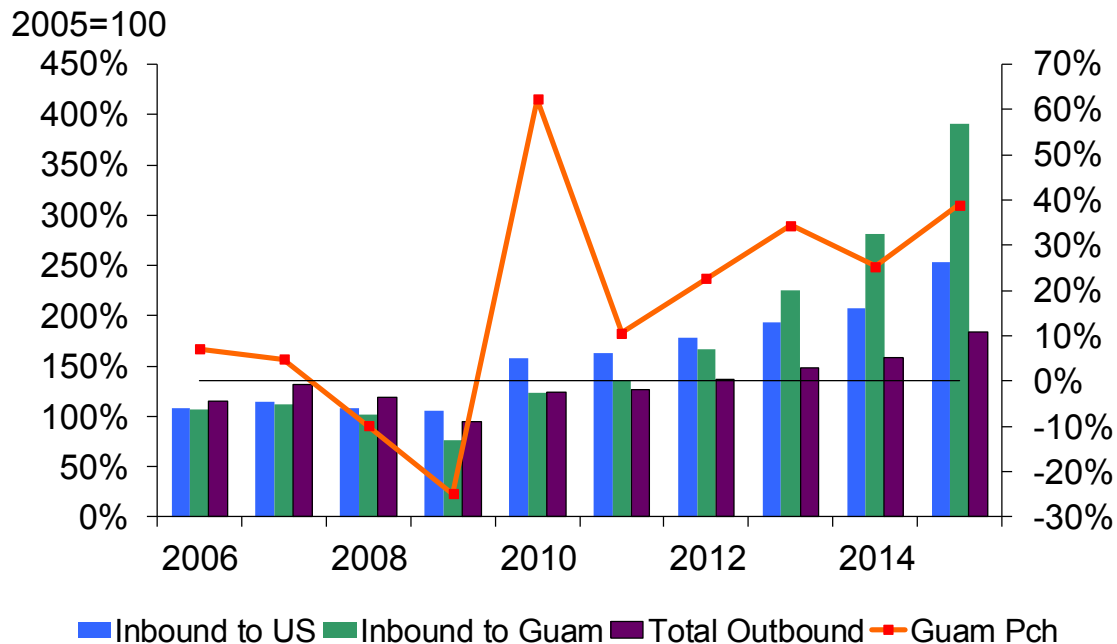


Source: Tourism Economics, GVB

- The performance of Japanese visitation to Guam has followed overall Japanese outbound travel, with declines in the last three years.
- Despite Japanese visitation falling in 2015, Guam's share of Japan-US visitation rose to 23.4%.

Perspective on the Korean market

Visit Share and Growth - Korea



Source : Tourism Economics, GVB

- Korean visitation to Guam has grown more than three-fold in the past five years, rising to 427,000 visitors in 2015.
- Korean visitation growth has averaged 33% over the past three years.
- Korean visitation to Guam has outperformed Korean visitation to the US – Guam’s share of Korean visitation to the US reached 24% in 2015.

Visitor Spending

Top recent trends

- Japan

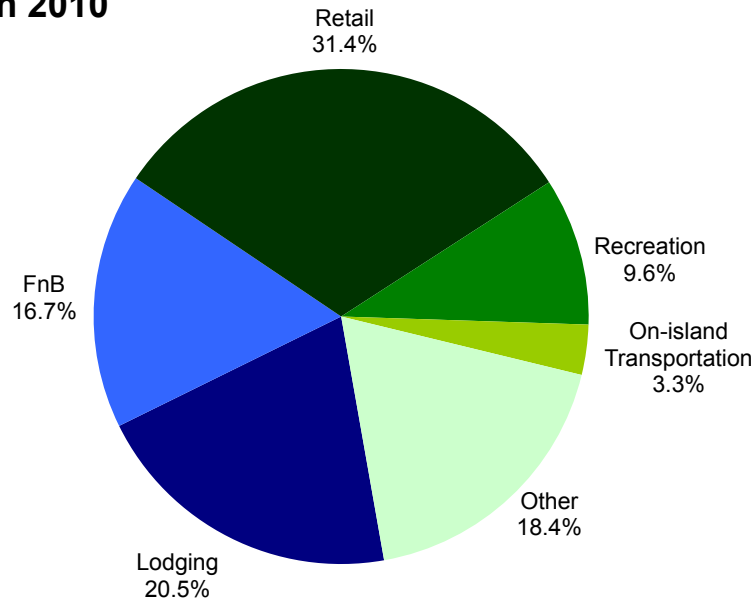
- Changes in where on-island dollar is going
- Slight declines in on-island \$ spending – which is really increases in Yen
- Pre-paid spend holding
- Results put in context

- Korea

- Spending shares much more stable
- Growth in on-island spending

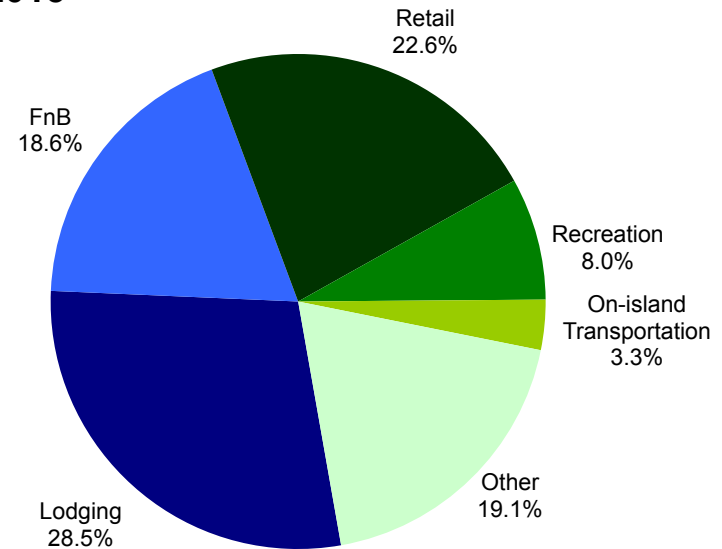
Visitor spending changes - Japan

Japan 2010



Source: GVB Visitor Surveys

Japan 2015

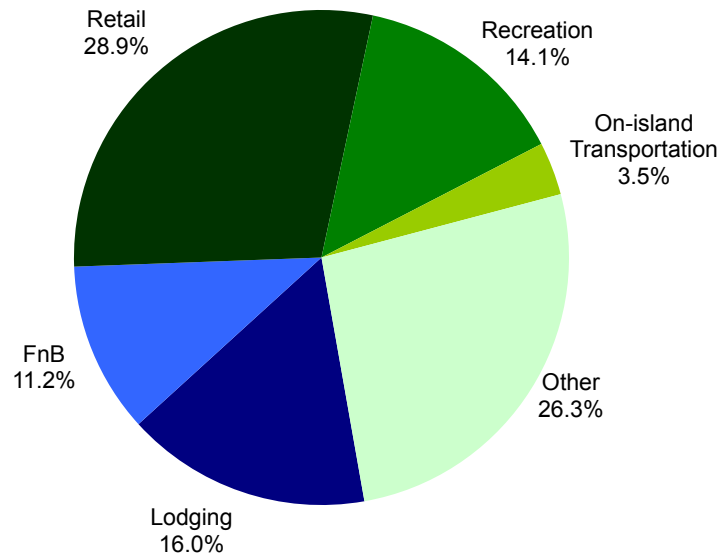


Source: GVB Visitor Surveys

- Very noticeable has been the drop in share of retail spending by Japanese visitors – a combination of slower GDP growth at home and weaker Yen.
- Of course, retail is still the 2nd largest spending category.

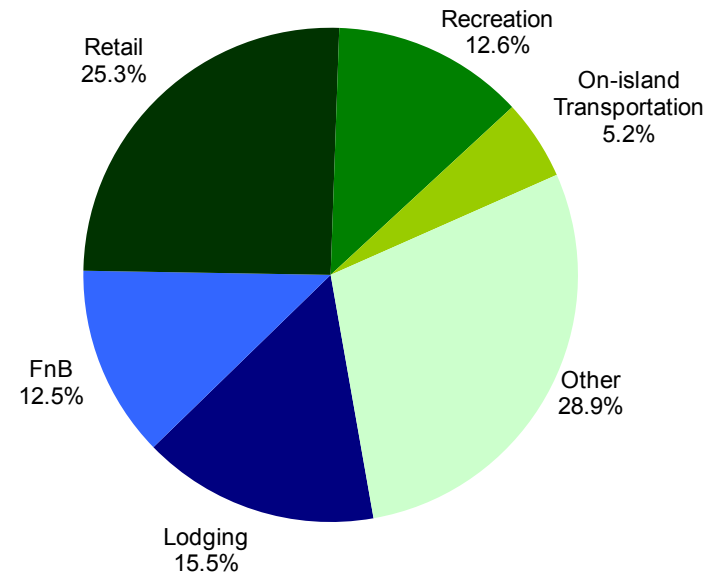
Visitor spending changes - Korea

Korea 2010



Source: GVB Visitor Surveys

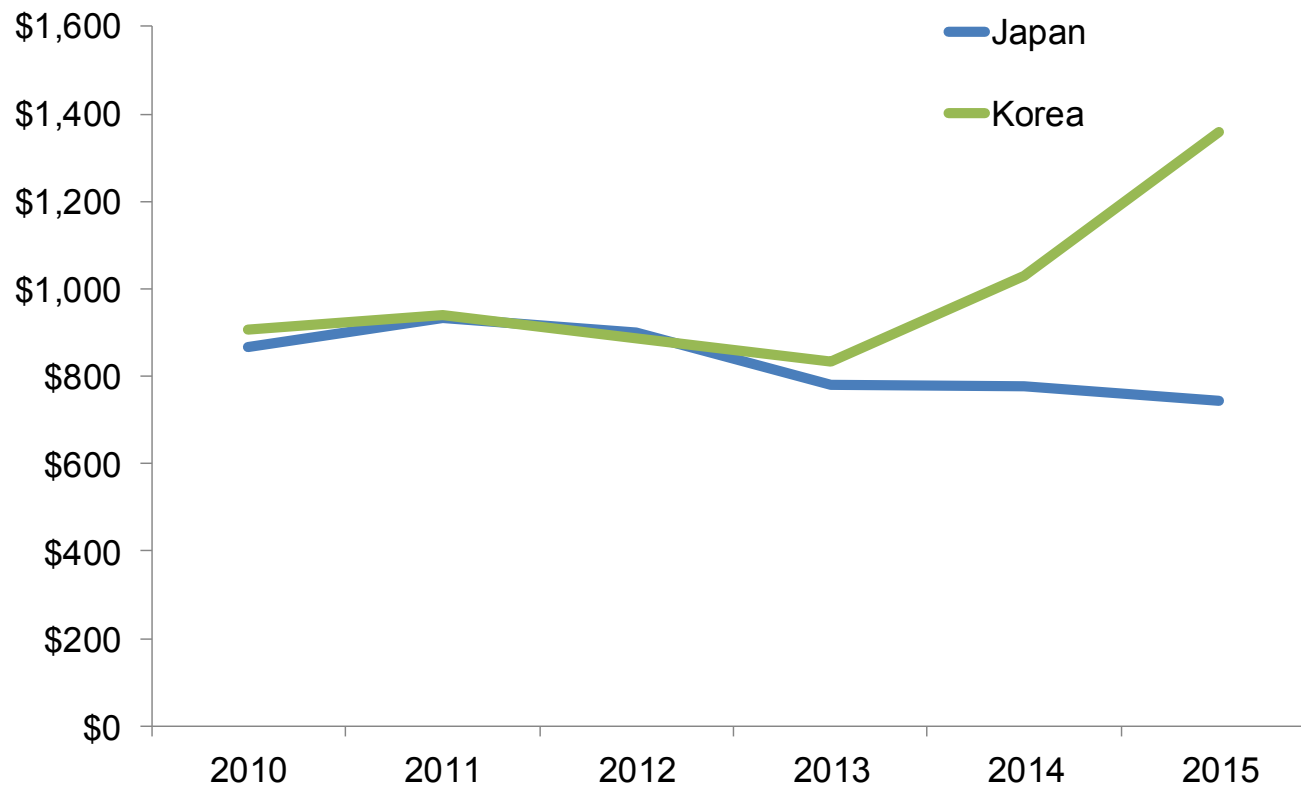
Korea 2015



- Korean spending shares have not see drastic changes over the last five years.

Visitor spending changes – on-island spending

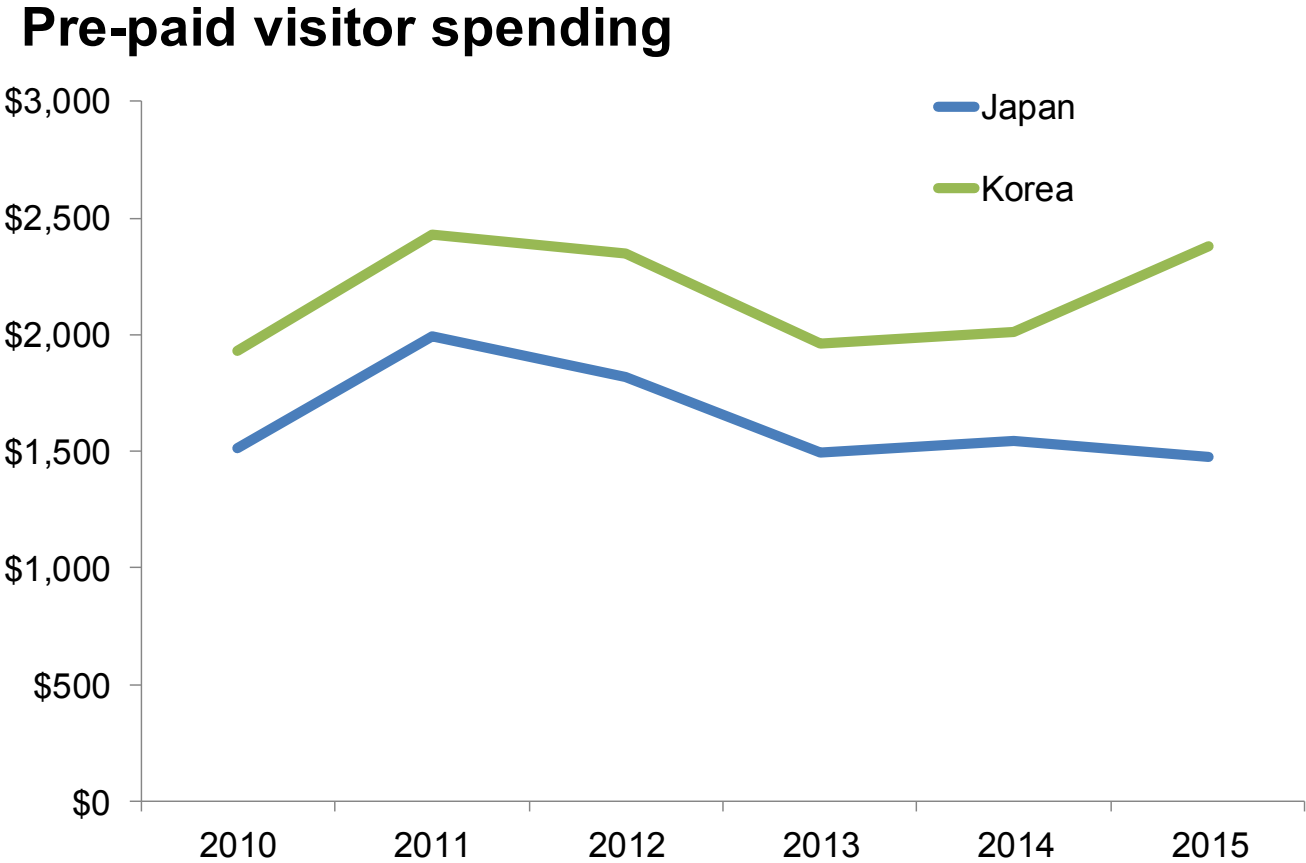
On-island spending



Source: GVB Exit Surveys

- On-island spending of Korean visitors has been increasing over the past three years while Japanese visitors spending has moderated.

Visitor spending changes – pre-paid spending



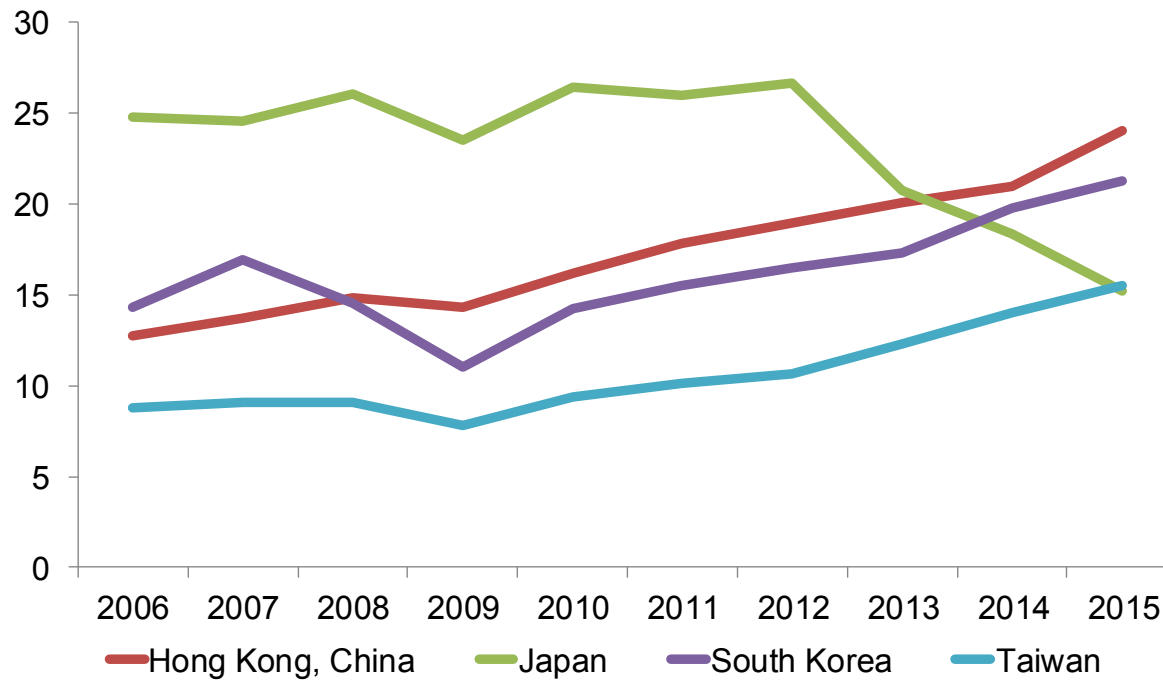
Source: GVB Exit Surveys

- Pre-paid spending of visitors – including airfare, hotel, and some touring/ ground transportation costs – moderated in recent years.

Is it me, or is it you

Outbound Travel Spending

US\$ Billions



Source: Tourism Economics

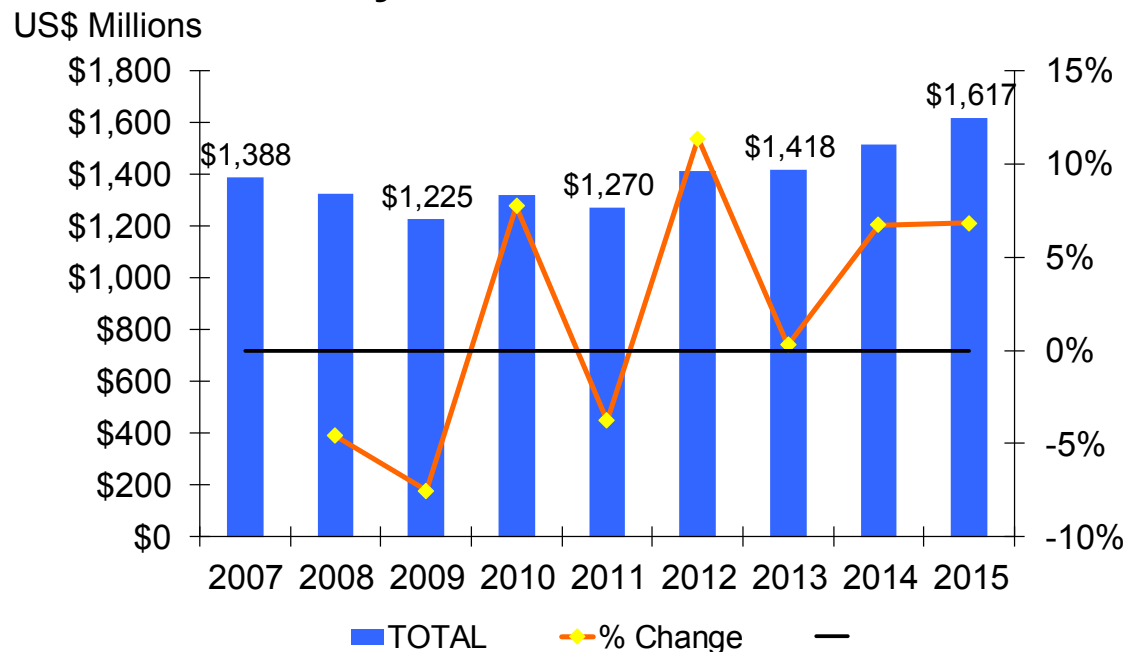
- Non-Japanese origin markets have seen their overall international spending grow.

Visitor Spending Results

Recent growth in visitor spending

- Visitor spending in Guam grew 6.8% in 2015 to surpass \$1.6 billion.
- Visitor spending increased by \$100 million over the previous year.
- Visitor spending has been on the rise since 2012, with a pause in growth in 2013.

Tourism Industry Sales

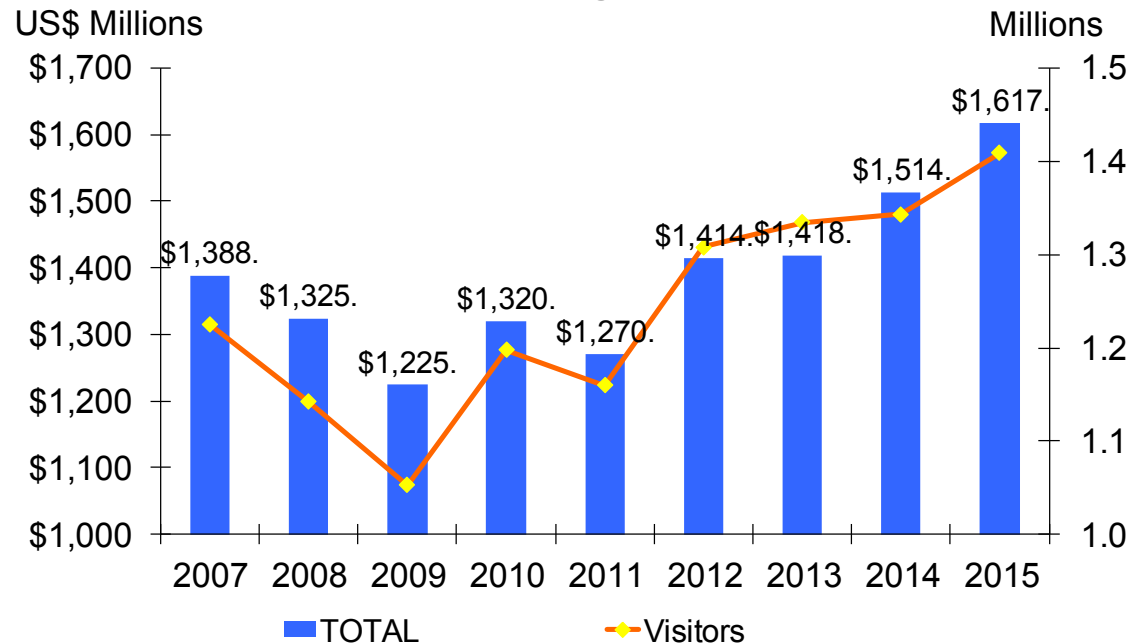


Source: Tourism Economics

Per-visitor spending growing

- Earlier in the decade, spending growth was dominated by visitation growth with per-visitor spending falling slightly.
- In the last two years, per-visitor spending has grown 8%, supporting spending growth along with visitation growth.

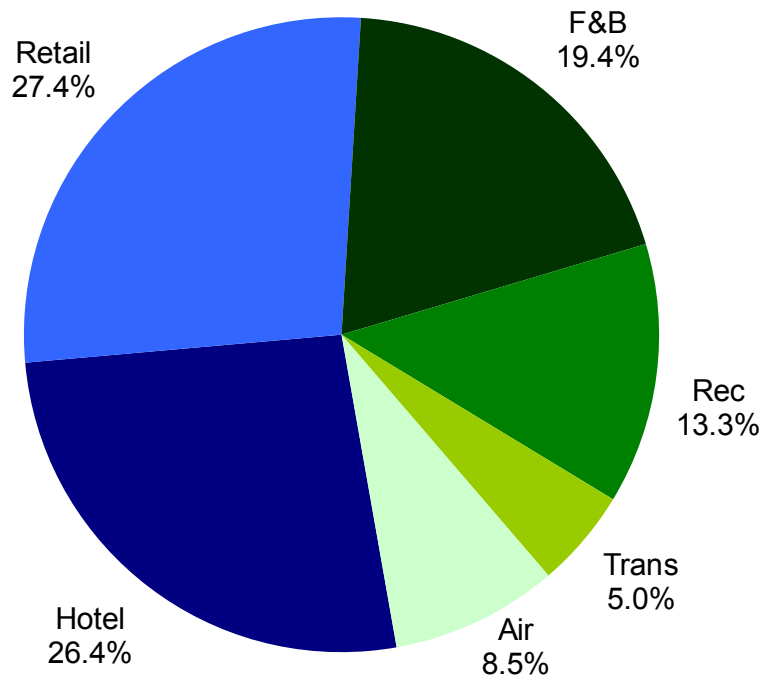
Guam Visits and Spending



Source: Tourism Economics

Visitor spending shares

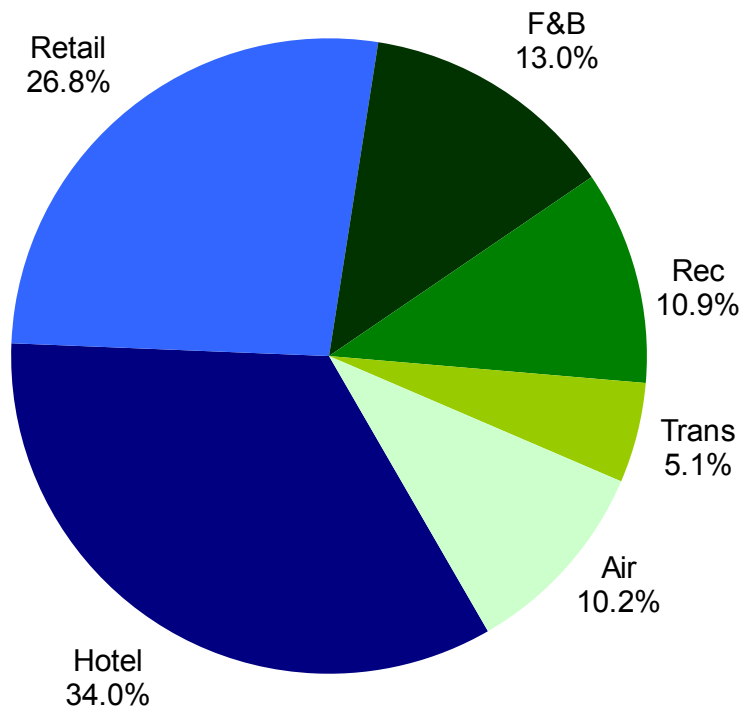
Tourism Commodity Sales By Sector



- Looking first at what visitors spent their money on in Guam in 2015, shopping was the largest spending category at 27% of all visitor dollars.
- 26% of all visitor spending was on lodging.
- 19 cents of every visitor dollar went to food and beverage expenditures in 2015.

Visitor spending shares

Tourism Industry Sales By Sector



- Changing the view to show in what type of businesses visitors are spending their money shows that the hotel-resorts on Guam see more than a third of all visitor spending on the island.
- With many hotels and resorts providing some food as part of pre-paid packages, the share of visitor spending at restaurants and other food and beverage establishments is just 13%.

Visitor spending by sector

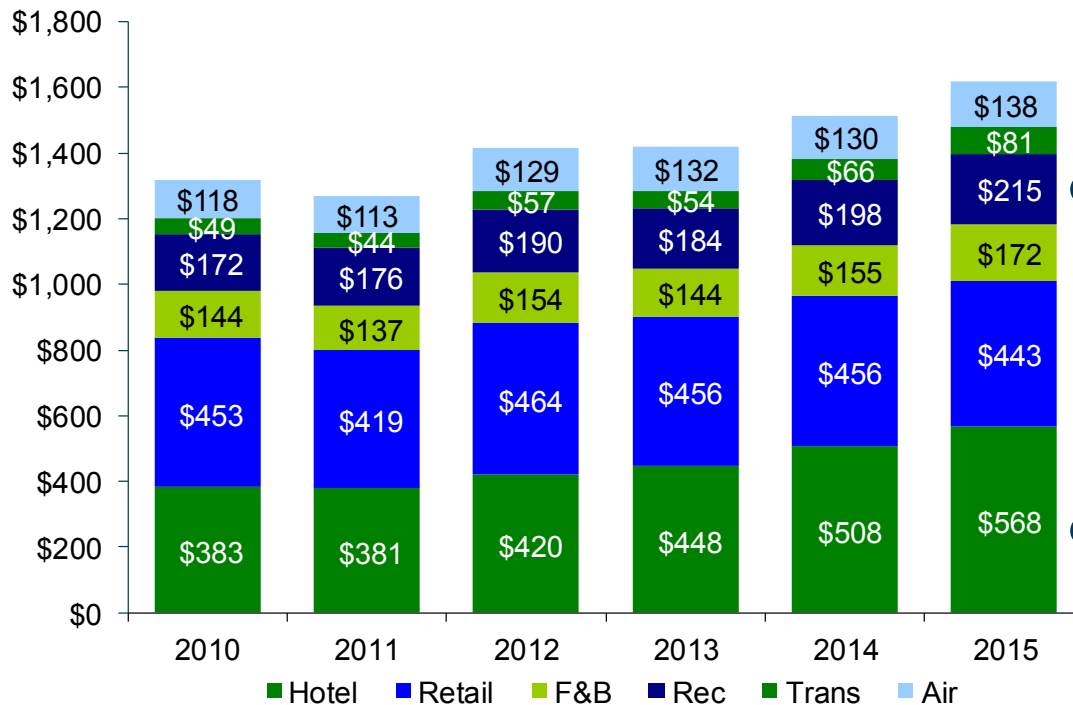
Tourism Industry Sales (US\$ Million)										
Sector	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change
Hotel	\$348.8	\$355.7	\$345.9	\$393.0	\$352.4	\$399.7	\$450.0	\$527.2	\$567.5	7.6%
Retail	\$469.7	\$405.2	\$404.3	\$453.2	\$439.3	\$500.7	\$439.2	\$458.4	\$448.3	-2.2%
F&B	\$131.3	\$151.9	\$130.5	\$134.4	\$134.3	\$151.4	\$170.7	\$192.5	\$217.1	12.8%
Rec	\$178.9	\$141.5	\$144.3	\$169.5	\$145.6	\$166.0	\$144.0	\$143.3	\$181.7	26.8%
Trans	\$34.8	\$36.9	\$34.1	\$40.0	\$33.0	\$40.6	\$45.8	\$62.1	\$85.2	37.3%
Air	\$113.8	\$119.0	\$118.5	\$133.8	\$139.7	\$159.3	\$162.9	\$160.3	\$170.6	6.4%
TOTAL	\$1,277.2	\$1,210.2	\$1,177.5	\$1,324.0	\$1,244.5	\$1,417.8	\$1,412.6	\$1,543.8	\$1,670.3	8.2%
% Change		-5.2%	-2.7%	12.4%	-6.0%	13.9%	-0.4%	9.3%	8.2%	

- With higher occupancies, hoteliers have been able to raise rates resulting in an increase in overall spending at hotels.
- Recreation spending has also seen a recent surge in spending in 2015.
- The appreciation of the dollar has hit retail sales growth in the past couple of years.

Visitor spending by industry

Guam's Tourism Industry Sales

by Year, Millions of \$

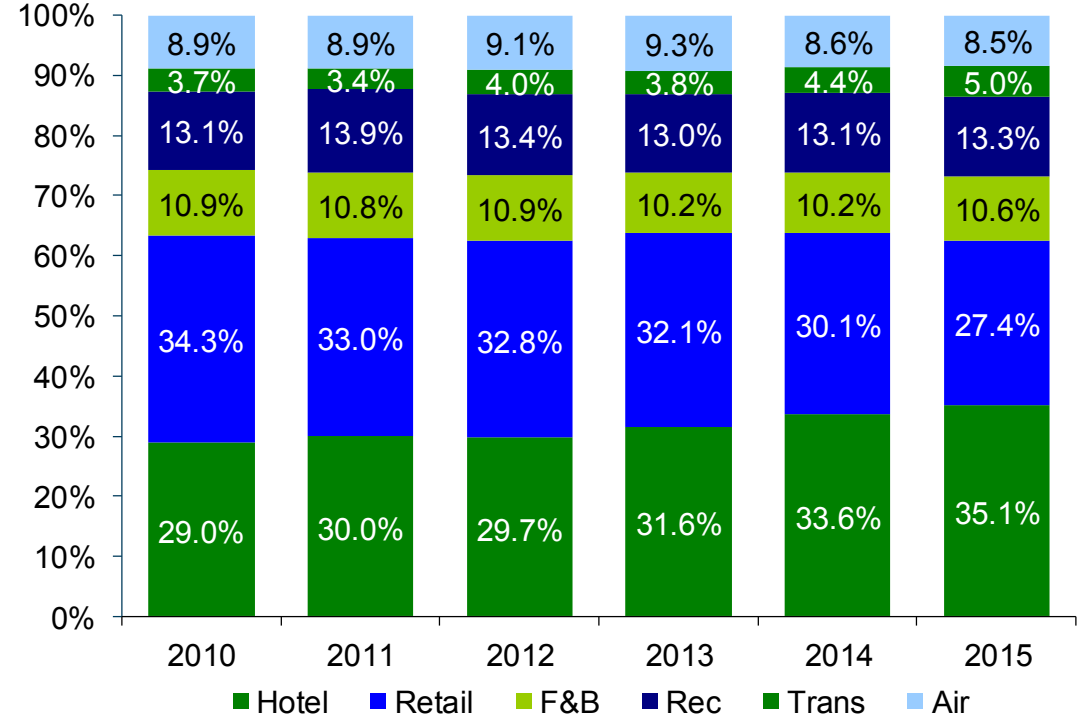


- Visitor spending in Guam has increased an average of 4.6% each year over the past three years.
- Lodging sales increased by \$60 million in 2015, representing 60% of visitor spending growth.
- Spending on food & beverages, recreation, and local transportation all grew between \$15-\$17 million in 2015.

Visitor spending by industry

Gaum's Tourism Industry Sales

by Year, Share of Total



- The share of each visitor dollar spent at lodging businesses increased over the past three years.
- Food & beverages and recreational spending shares have increased over the past two years.

Guam Tourism Industry Impacts (Direct)



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Tourism industry impacts

Core Tourism		
	Employment	GDP
Agriculture, Fishing, Mining	-	-
Construction and Utilities	-	-
Manufacturing	-	-
Wholesale Trade	-	-
Air Transport	21	\$3.2
Other Transport	315	\$17.0
Retail Trade	2,221	\$113.0
Gasoline Stations	36	\$1.9
Communications	-	-
Finance, Insurance and Real Estate	-	\$0.0
Business Services	790	\$42.0
Education and Health Care	-	-
Recreation and Entertainment	1,820	\$76.7
Lodging	5,873	\$312.5
Food & Beverage	3,190	\$64.4
Personal Services	382	\$6.6
Government	-	\$0.0
TOTAL	14,649	\$637.3

- Tourism GDP is the value added of those sectors directly interacting with travelers.
- The narrow definition of the tourism industry counts only tourism consumption, which excludes capital investment and general government support of tourism. This definition is consistent with economic accounts for other industries.
- Tourism industry GDP was \$637 million in 2015, accounting for 11.2% of total Guam GDP.
- Tourism GDP has increased 26%, from \$504.5 million in 2010.

Why sales and GDP differ

- Tourism industry sales in Guam equal \$1.6 billion while GDP only measures \$637 million.
- GDP (Gross domestic product) is less than sales because it measures only the locally-produced value of goods and services consumed by visitors.
 - This includes the local labor, capital depreciation, and the profits of tourism-related companies that are based in Guam.
 - The costs of imported goods (gasoline, food or retail goods) that come from out-of-state are excluded from the GDP calculation.
 - In addition, business profits from non-local companies are also excluded. For example, Hyatt profits leave the economy.

Illustrating the concepts

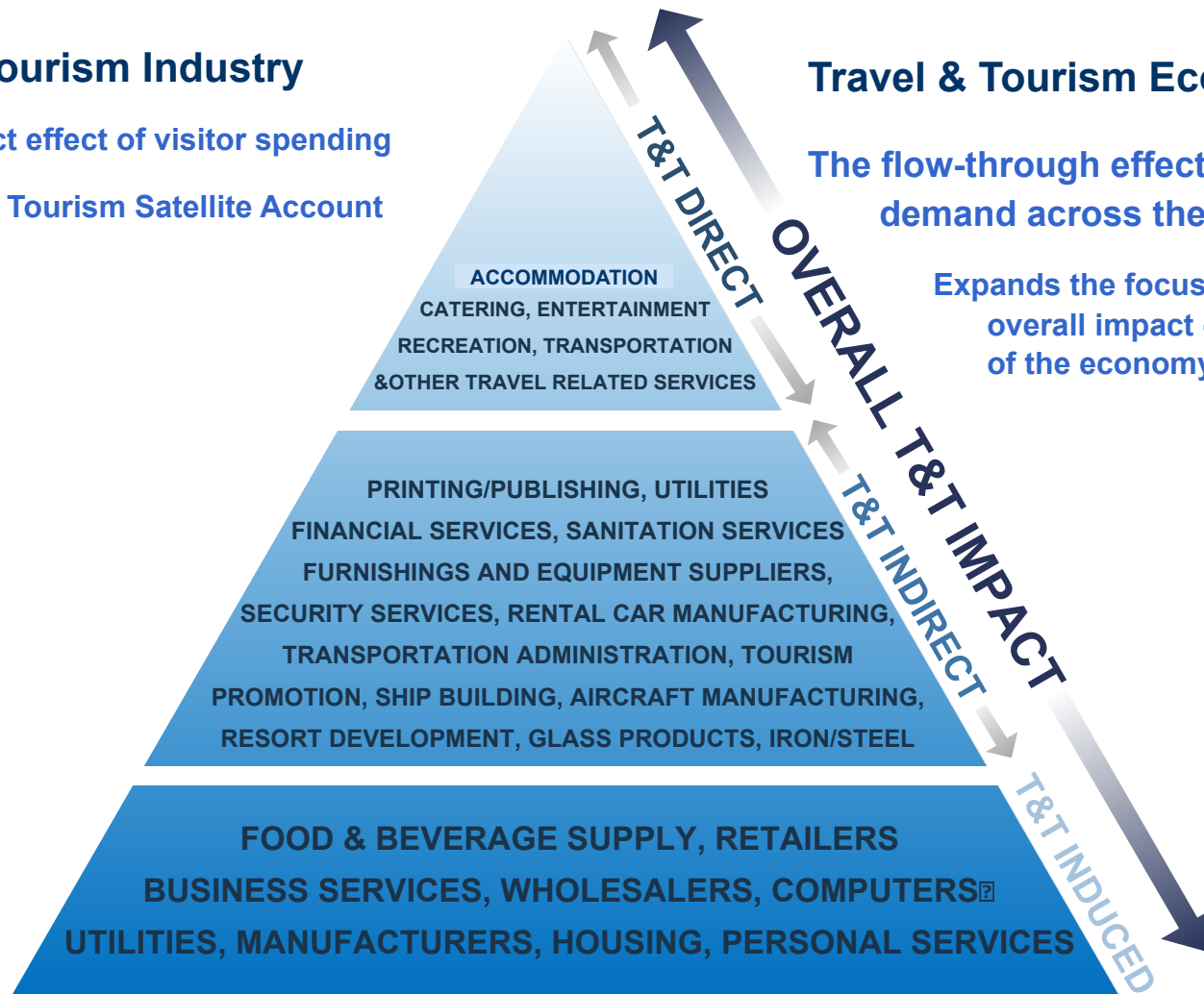
Travel & Tourism Industry

The direct effect of visitor spending
Focus of Tourism Satellite Account

Travel & Tourism Economic Impact

The flow-through effect of T&T all demand across the economy

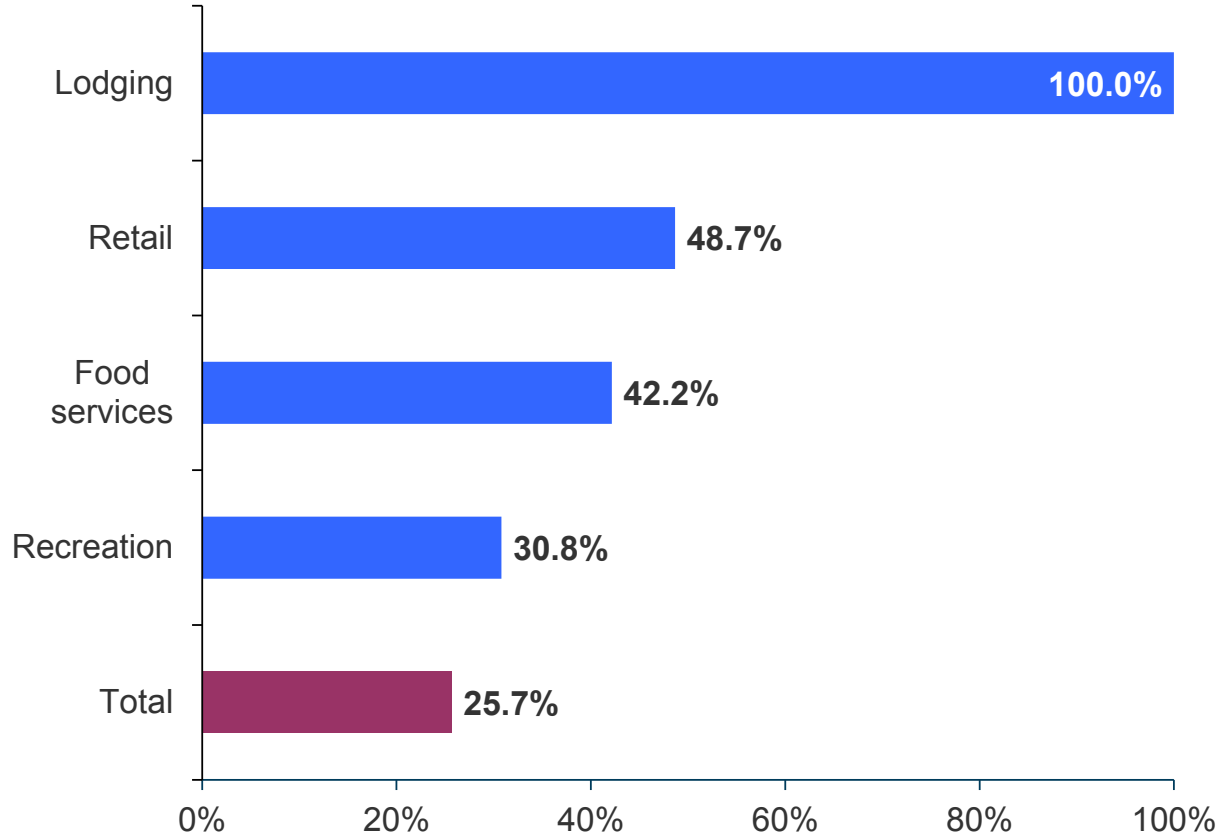
Expands the focus to measure the overall impact of T&T on all sectors of the economy



Tourism share of key industry employment

- Tourism is a significant part of several industries – visitor spending directly supports 100% of all employment in lodging, 49% of retail employment, and 42% of food & beverages jobs.

Tourism Employment Intensity by Industry

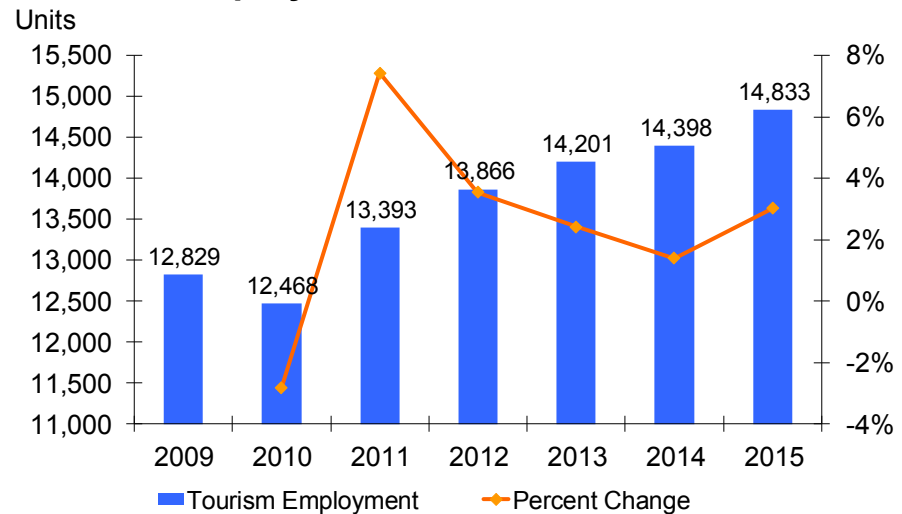


Tourism employment surging (direct)

Tourism Employment							
	2009	2010	2011	2012	2013	2014	2015
Tourism Employment	12,829	12,468	13,393	13,866	14,201	14,398	14,833
Percent Change		-2.8%	7.4%	3.5%	2.4%	1.4%	3.0%

- Tourism employment grew 3.0% and added 450 employees in 2015.
- If visitors were banned from Guam and these jobs disappeared, the unemployment rate would rise to 30% from 6.9%.

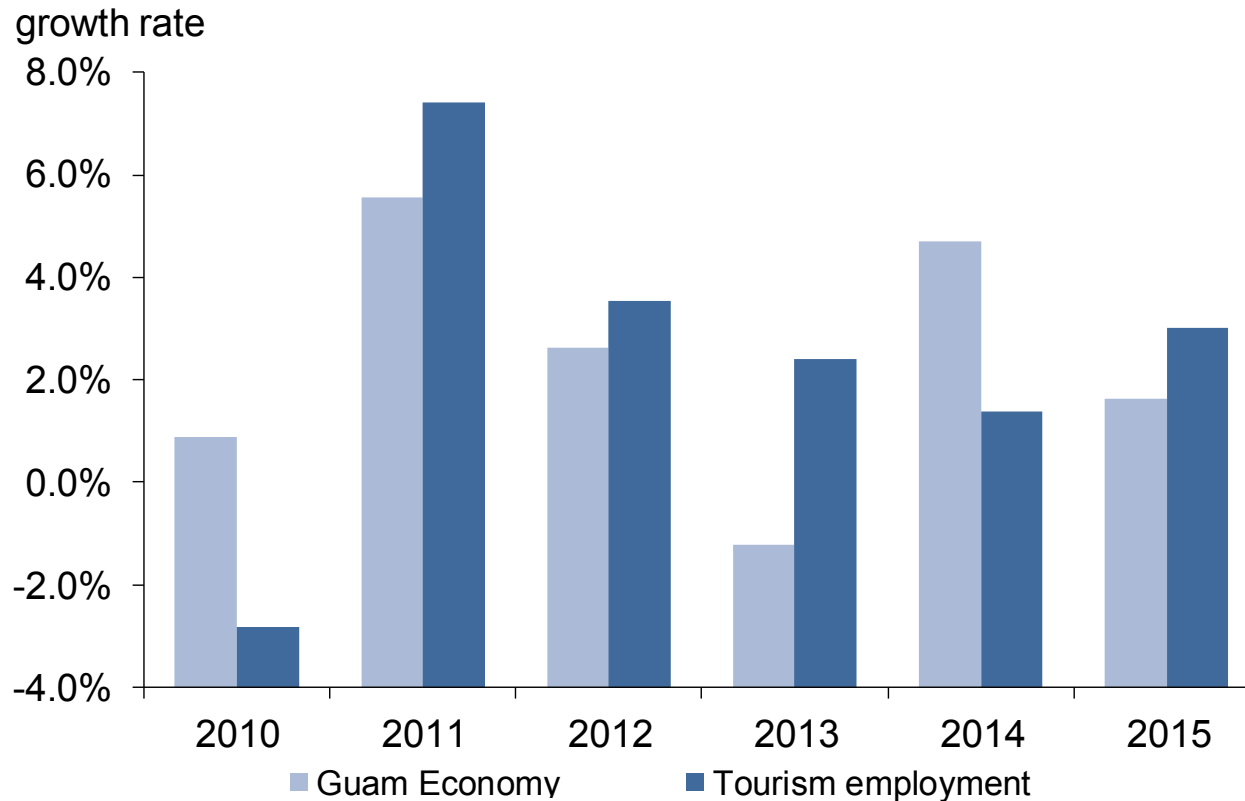
Tourism Employment



Source : Tourism Economics

Tourism employment growth

Tourism employment driving growth



Source: BEA, Tourism Economics

- And not only is the tourism employment industry large, in four of the last six years, it has grown faster than the island economy, helping drive Guam's employment growth.

Tourism employment ranks

Employment Ranking - Private Sector		
Guam		
Rank	Industry	2015
1	Accommodation and food services	13,314
2	Retail trade	9,613
3	Construction	6,628
4	Administrative and support and waste management and remediation services	4,101
5	Health care and social assistance	3,506
6	Wholesale trade	2,749
7	Transportation and warehousing	2,708
8	Other services (except public administration)	2,526
9	Professional, scientific, and technical services	2,525
10	Finance and insurance	2,195
11	Real estate and rental and leasing	1,904
12	Information	1,306
13	Educational services	1,209
14	Arts, entertainment, and recreation	1,178
15	Manufacturing	972

Visitor supported employment = 14,833

- Visitor supported employment, were it an industry, would be the largest on Guam.

Total Tourism Economy



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Tourism economy sales

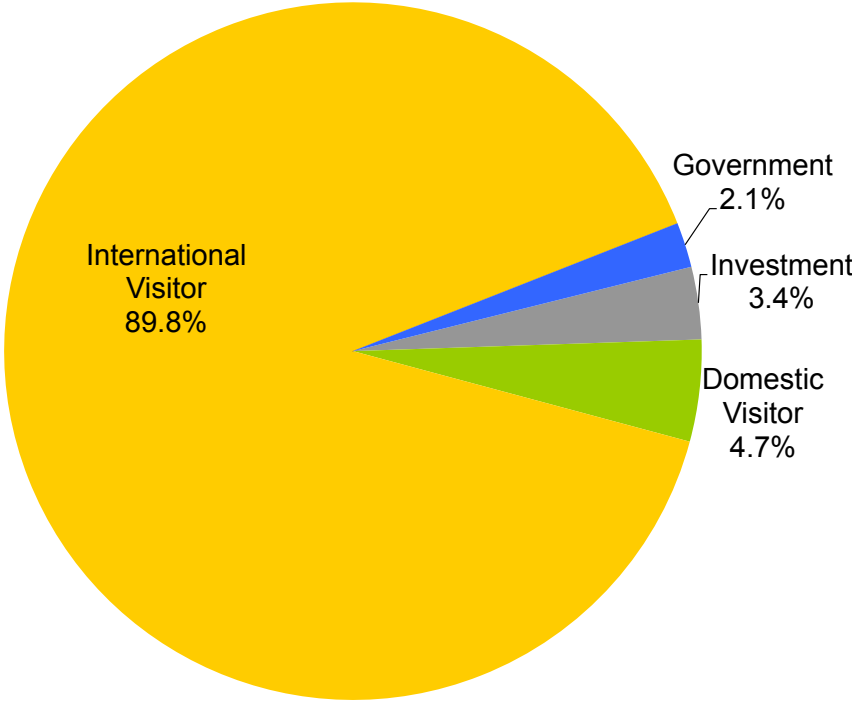
- The Tourism Satellite Account looks at a broader range of tourism-related expenditures.

Tourism Satellite Account				
Tourism Economy Sales				
2015, \$ millions				
Domestic Visitor	International Visitor	Gov't Support	CAPEX	Total
\$80.6	\$1,536.4	\$35.6	\$57.4	\$1,710.0

- Government support for tourism includes the airport operations and GVB spending, along with other budget items in broad support of tourism.
- Capital investment (CAPEX) includes construction of hotels and attractions, as well as tourism equipment and infrastructure.
- Total tourism economy sales tallied \$1.7 billion in 2015.

Tourism economy sales by source

Tourism Economy Sales Share by Source



- International visitor markets comprise the majority (90%) of tourism sales in Guam.
- Domestic visitor markets contributed 4.7% of tourism sales last year.
- Governmental spending in support of tourism contributed 2% of tourism sales.

Economic Impact of Visitor Spending

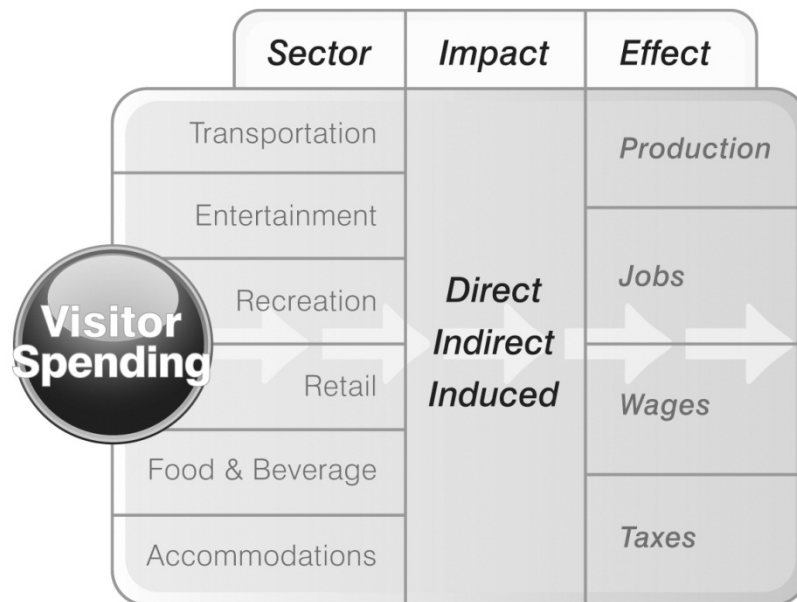


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How visitor spending generates impact

- Travelers create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP within each sector.
- Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.



- Lastly, the induced impact is generated when employees whose incomes are generated either directly or indirectly by tourism, spend those incomes in the local economy.

Visitor spending impacts

- Including indirect and induced business sales, visitor spending generated \$2.3 billion in business sales in 2015.

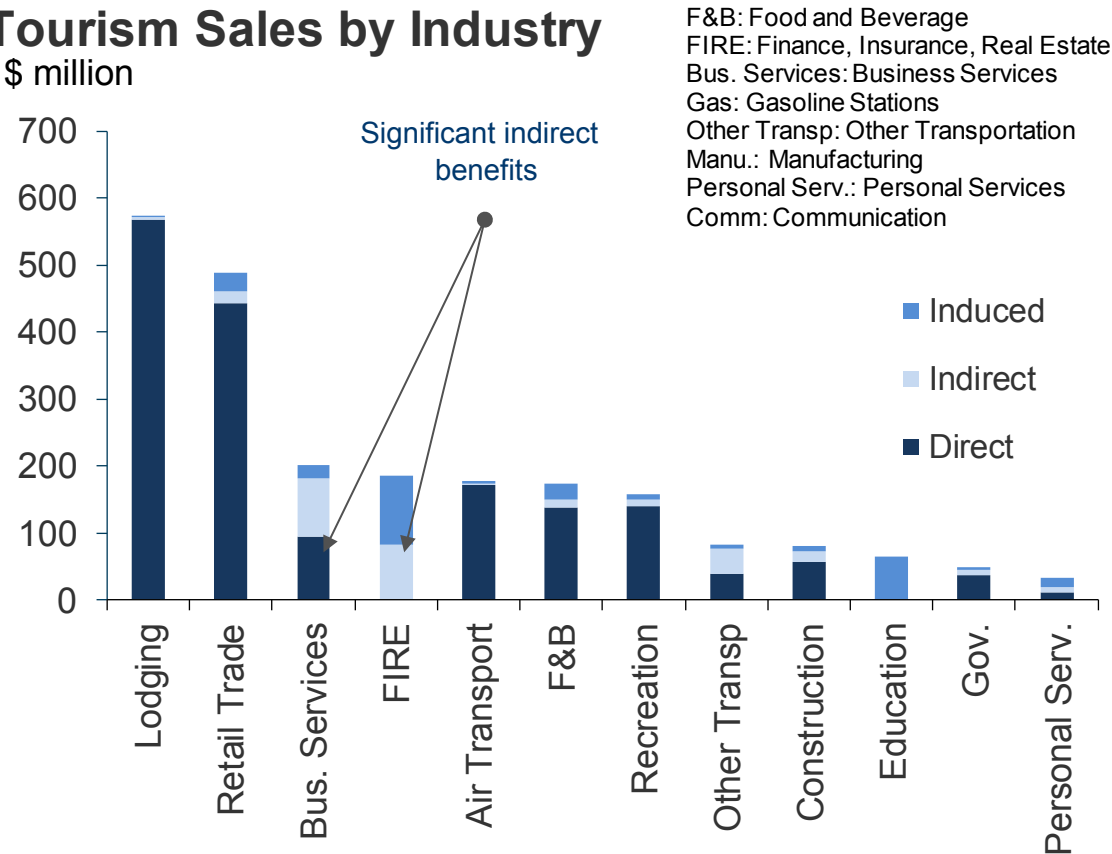
Tourism Sales				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	1.4	1.2	2.6
Construction and Utilities	57.4	15.8	7.2	80.3
Manufacturing	-	4.4	2.2	6.6
Wholesale Trade	-	12.3	10.7	23.0
Air Transport	170.6	3.0	3.2	176.9
Other Transport	38.4	37.5	6.1	81.9
Retail Trade	442.8	17.5	28.0	488.2
Gasoline Stations	24.4	0.7	1.2	26.3
Communications	-	16.6	10.4	27.0
Finance, Insurance and Real Estate	-	82.1	102.9	185.0
Business Services	93.9	86.6	21.5	202.0
Education and Health Care	-	0.5	63.8	64.3
Recreation and Entertainment	139.7	9.1	9.0	157.9
Lodging	568.7	2.9	1.3	573.0
Food & Beverage	137.8	11.8	23.8	173.4
Personal Services	10.8	7.5	13.4	31.6
Government	35.6	9.8	4.0	49.4
TOTAL	1,720.1	303.5	258.0	2,281.7

* Direct sales include cost of goods sold for retail sectors

Visitor spending impacts

- All business sectors of the Guam economy benefit from tourism activity directly and/or indirectly.
- Sectors that serve the tourism industry, such as business services, gain as suppliers to a dynamic industry.

Tourism Sales by Industry
\$ million



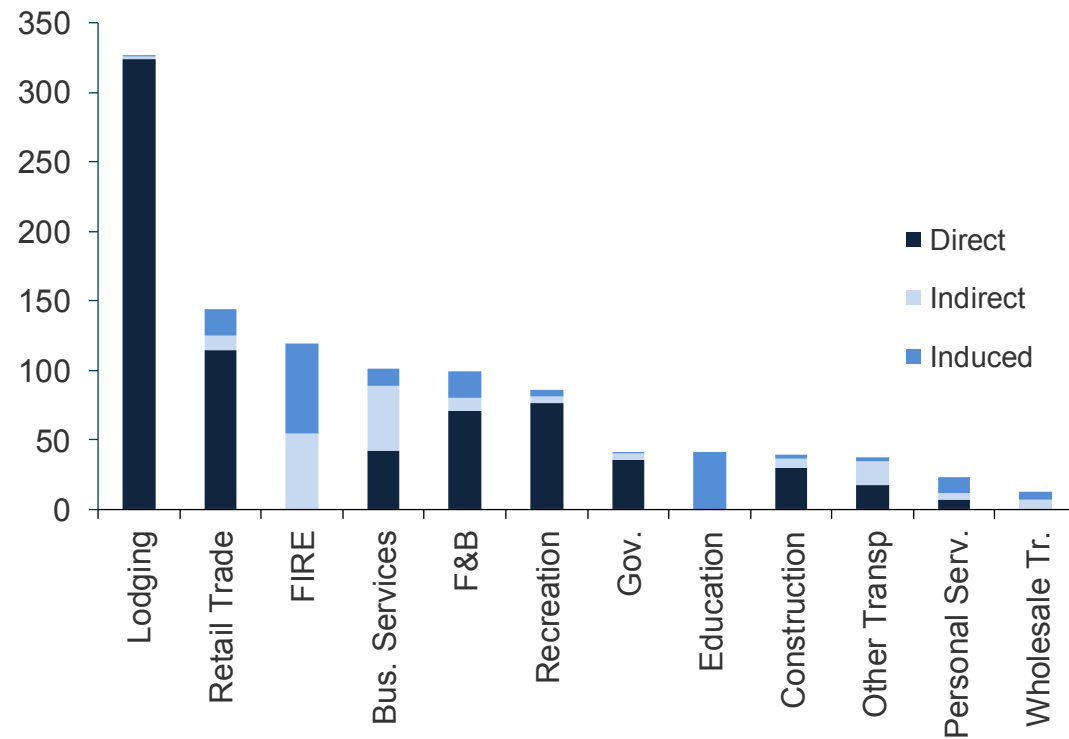
Note: Direct sales include cost of goods sold for retail

FIRE = finance, insurance and real estate

Tourism economy GDP impact

- 19% of Guam's GDP is tourism-related.
- Lodging provides \$325 million in economic impact.

Tourism GDP by Industry
\$ million



Tourism economy GDP impact

Gross Island Product							
(US\$ Million)							
Sector	2009	2010	2011	2012	2013	2014*	2015*
Guam	4,781.0	4,895.0	4,928.0	5,199.0	5,357.0	5,530.3	5,669.2
Total Tourism	850.4	887.4	902.5	951.6	1,002.7	1,045.8	1,088.9
Direct Tourism	478.8	504.5	515.7	543.6	579.3	607.3	637.3

* 2014-2015 estimates

- Direct tourism's GDP impact on Guam reached \$637 million in 2015 with tourism's total impact reaching \$1,089 million.
- Direct tourism's share of GDP has grown from 10.3% of the economy in 2010 to 11.2% in 2015.
- Tourism's total share has increased 1.1 percentage point in five years to reach 19.2%.

Tourism impact on employment (total)

Tourism Employment				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	26	17	42
Construction and Utilities	374	78	26	477
Manufacturing	-	20	5	24
Wholesale Trade	-	69	45	114
Air Transport	21	8	7	36
Other Transport	315	287	40	642
Retail Trade	2,415	213	235	2,863
Gasoline Stations	36	9	12	56
Communications	-	55	16	71
Finance, Insurance and Real Estate	-	390	193	583
Business Services	790	891	192	1,873
Education and Health Care	-	13	463	476
Recreation and Entertainment	1,820	174	80	2,074
Lodging	6,057	21	7	6,085
Food & Beverage	3,190	209	325	3,724
Personal Services	382	118	223	723
Government	389	62	15	467
TOTAL	15,789	2,642	1,900	20,332

- Visitor spending directly and indirectly supported 20,332 jobs, 33% of all employment in Guam last year.

Tourism personal income

Tourism Labor Income (Compensation)				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	0.5	0.5	1.0
Construction and Utilities	20.7	4.6	2.0	27.4
Manufacturing	-	0.6	0.2	0.8
Wholesale Trade	-	3.3	2.9	6.1
Air Transport	1.0	0.4	0.4	1.9
Other Transport	13.1	13.0	2.0	28.0
Retail Trade	69.8	5.3	10.4	85.5
Gasoline Stations	1.1	0.3	0.5	1.9
Communications	-	2.9	1.3	4.2
Finance, Insurance and Real Estate	-	15.9	10.7	26.6
Business Services	23.7	32.8	8.5	64.9
Education and Health Care	-	0.3	36.7	37.0
Recreation and Entertainment	47.5	3.4	2.8	53.7
Lodging	121.8	1.0	0.5	123.3
Food & Beverage	49.1	6.0	11.6	66.6
Personal Services	7.9	4.3	8.9	21.1
Government	30.9	6.1	1.9	38.9
TOTAL	386.6	100.6	101.6	588.8

- Employees in Guam earned \$590 million as a result of visitor activity in 2015.

Tourism tax generation

Traveler Generated Taxes		
(US\$ Million)		
Tax Type	2010	2015
Corporate	17.2	21.1
Indirect Business	26.3	32.3
Personal Income	24.5	29.4
Social Security	53.8	64.7
Hotel Occupancy Tax	24.1	37.0
Gross Receipts Tax	42.9	51.2
Special Revenues	8.3	10.2
TOTAL	197.2	246.0

- Taxes of more than \$245 million were directly and indirectly generated by tourism in 2015.
- Tax revenue has increased by nearly \$50 million over the past five years, from \$197 million in 2010.
- Each visitor contributes \$175 in tax revenue.

2015 Wrap-up

- Visitor spending in Guam grew 6.8% in 2015, reaching \$1.6 billion with a total impact on business sales of more than \$2.3 billion.
- 1-in-5 dollars of Gross Island Product, 1-in-3 jobs on the Island of Guam is supported by the tourism economy.
- Visitor supported employment growth is outpacing island employment growth.
- Total state and local tax revenue supported by tourism activity reached \$245 million.

Tourism in context

Fun facts

- Visitor spending of \$1.6 billion is similar in size to the amount of money spent on personal services for Mom on Mother's Day.
- \$1.6 billion means that, on average, more than \$3,000 was spent by visitors on Guam every minute.
- \$1.6 billion in visitor spending is nearly \$1,000 for each resident on Guam.
- Each visitor on Guam spends, on average, \$1,150.

Fun facts

- The height of a \$1.6 billion pile of \$1 bills is nearly 110 miles – which would span the length of Guam 3.67 times.



Fun facts

- Visitors directly supported more than 14,650 jobs – similar in number to the amount of street lights on Guam.



Fun facts

- \$79,000 in visitor spending supports one direct job on Guam – which means that it takes the spending of about 70 visitors to support a job.
- Thought of another way, each Boeing 757 that lands in Guam has 180 seats – enough to support two-and-a-half jobs on the island assuming all on-board passengers are visitors.



Fun facts

- Were the \$245 million split among Guam households, each household would receive a check for \$4,840 – enough for a year of in-state tuition at the University of Guam.



On the Road to 2 million

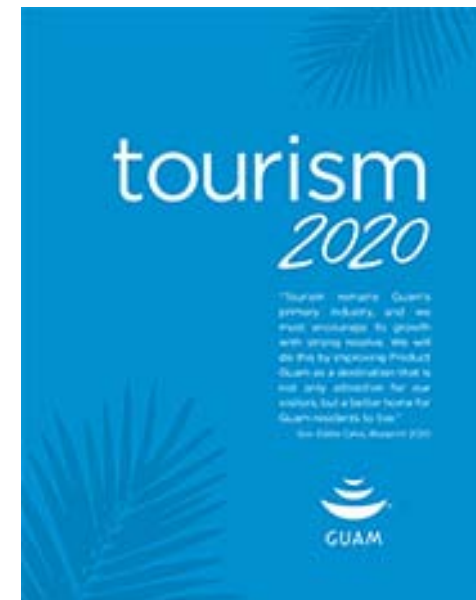


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2020 vision

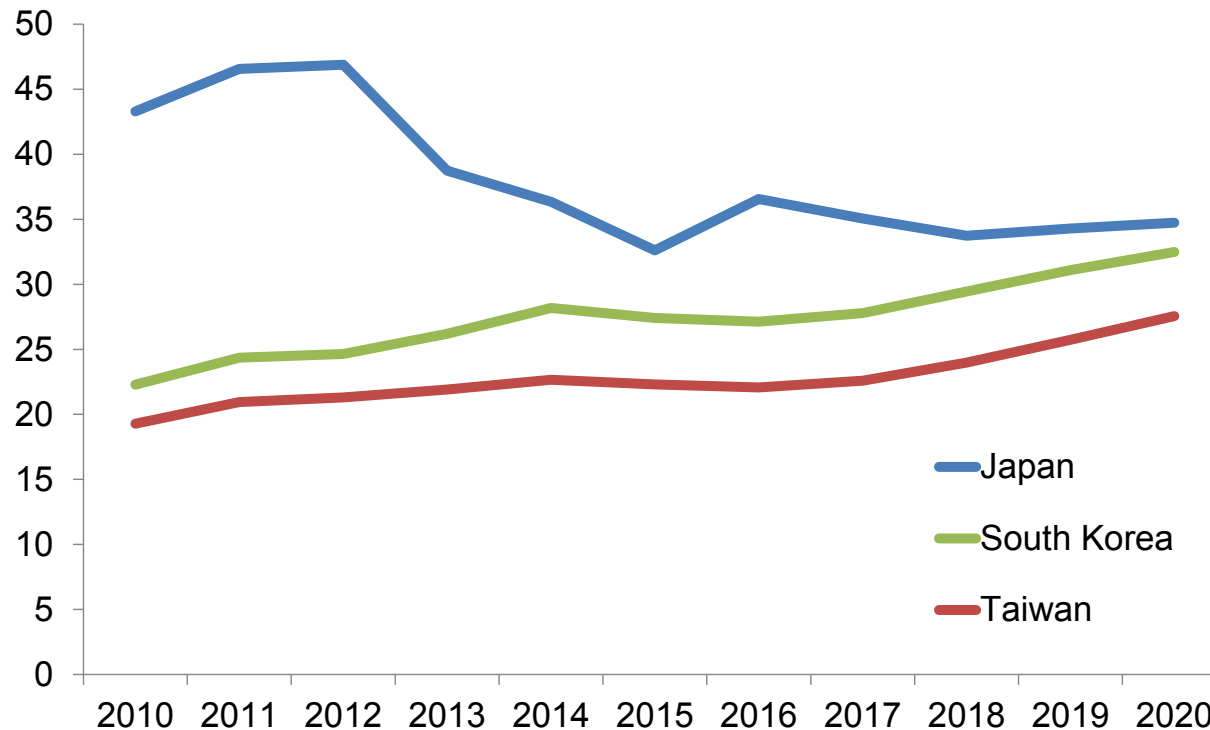
- Guam Tourism 2020 is a roadmap to guide the island towards the shared vision for Guam's visitor industry. Tourism 2020 is a development plan to help shape Guam's future, with eight core objectives that are needed in order for Destination Guam to thrive in a competitive global environment.
- One of the plan's core objectives is to reach 2 million arrivals.



GDP growth accelerates later in the decade

GDP per capita, nominal, US\$

Thousands



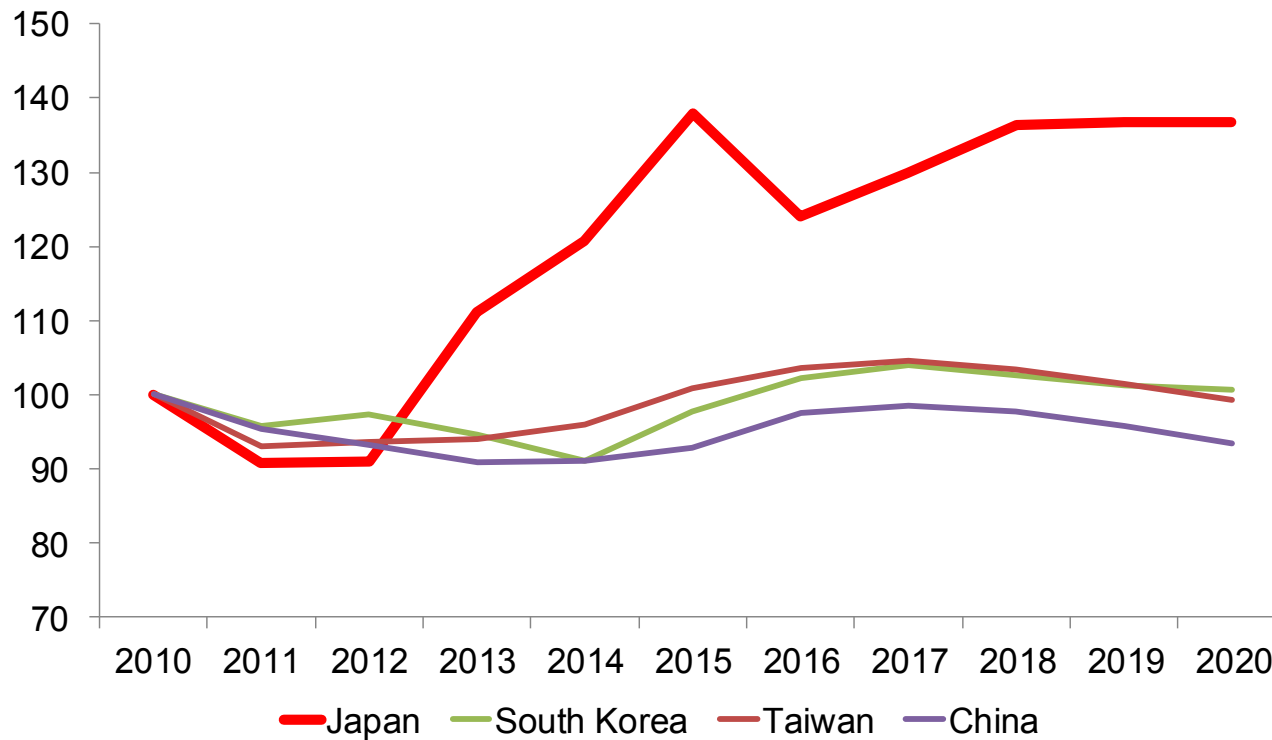
Source: Oxford Economics

- After slow GDP growth in key origin markets in 2016 and 7, growth should bounce back later in the decade.

Exchange rates stabilize

Exchange rate

Index, 2010=100

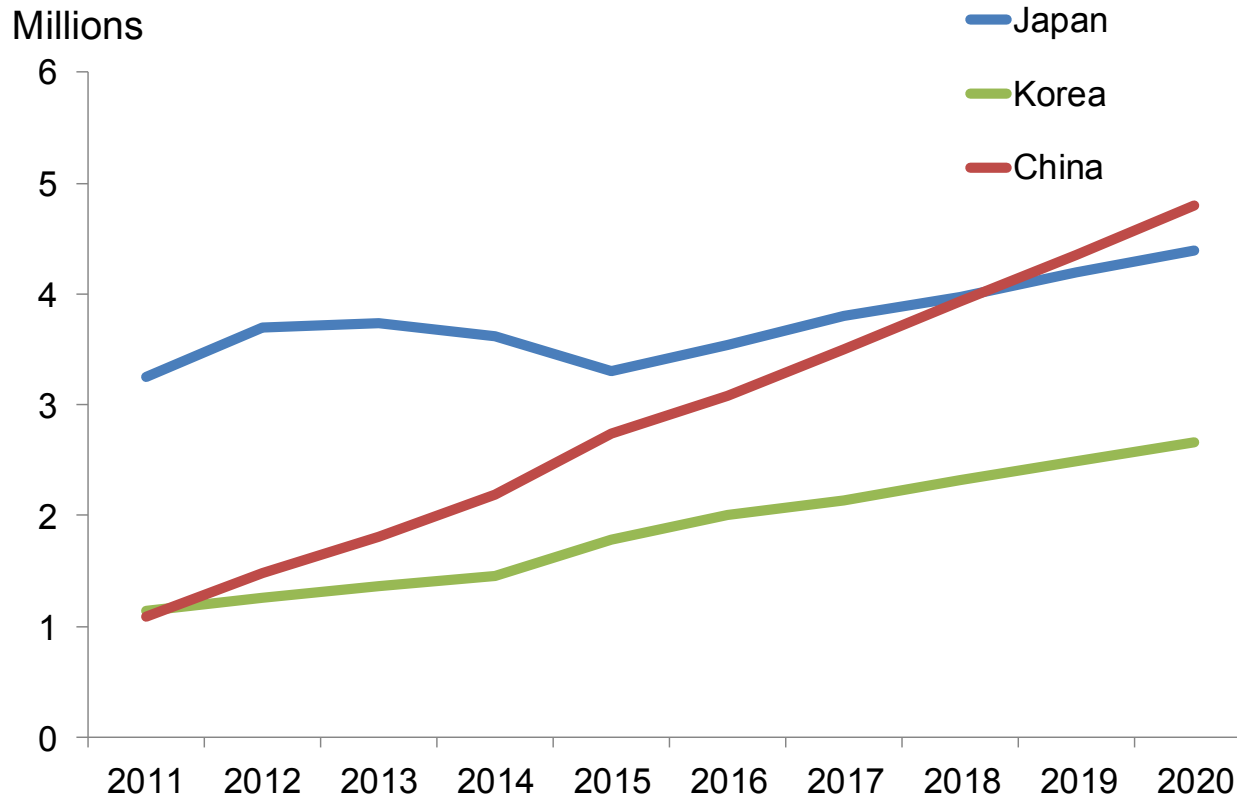


Source: Oxford Economics

- Exchange rate disruptions seen the last couple of years are forecast to moderate.

US arrivals will continue to grow

US Arrivals

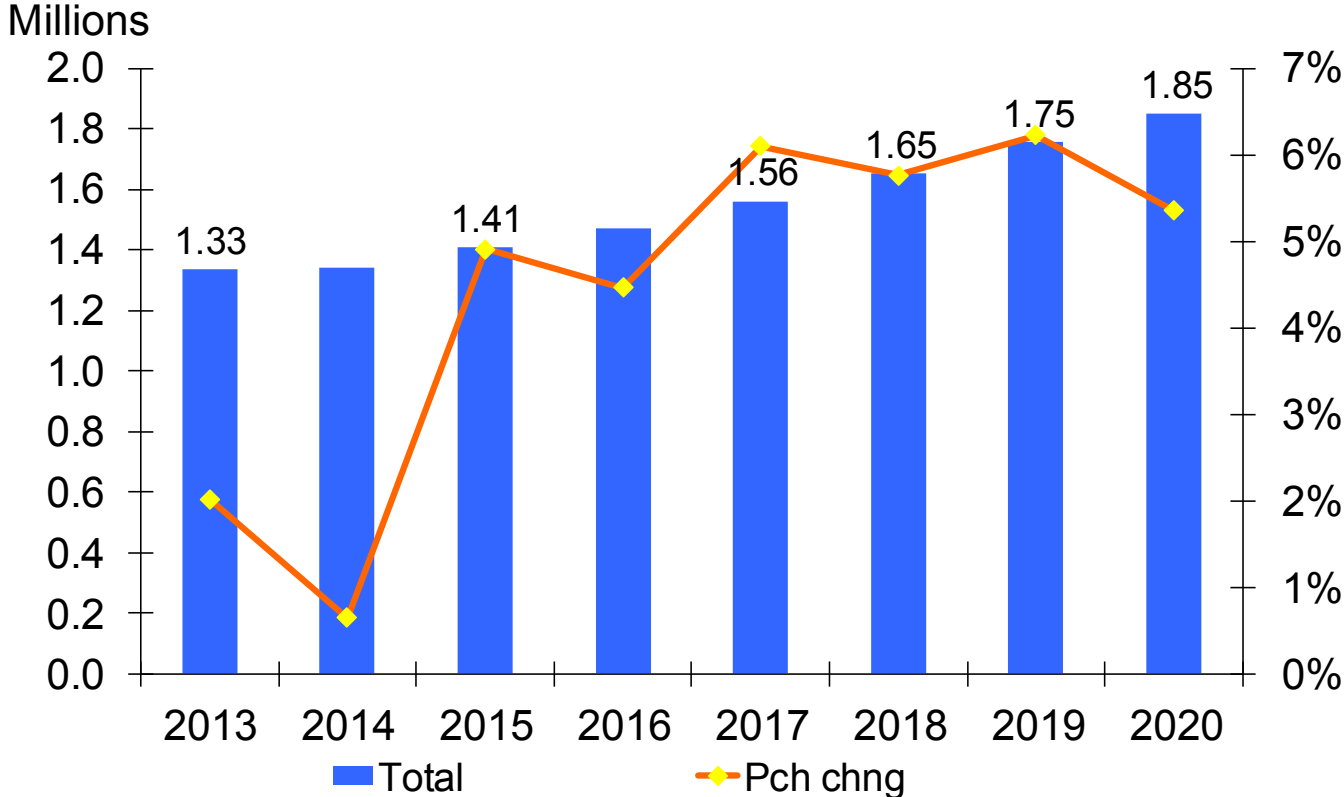


Source: Tourism Economics

- US visitation from Korea and China continues to grow while Japan rebounds.

What does that mean for Guam visitation

Visitation forecast

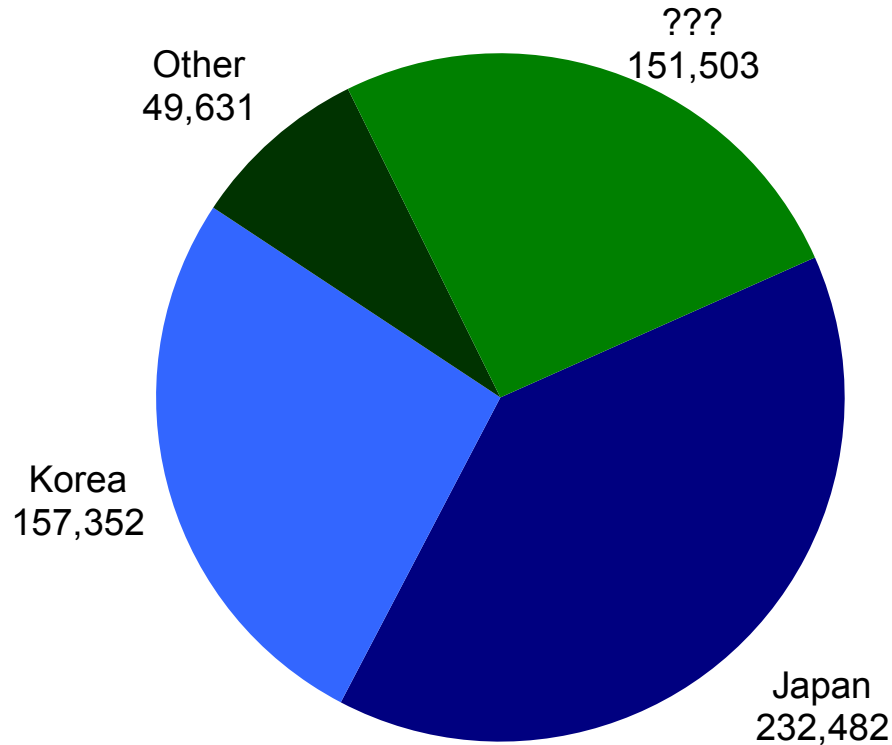


Source : Tourism Economics

- Just keeping Guam’s recent share of total US visitation for Korea and Japan and holding other origins at a constant share gets to 1.85 million.

What does that mean for Guam visitation

The road to 2 million



- The challenge for GVB – hold on to shares in key origin markets AND find another 150,000 visitors.

Methodology and Background



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Why quantify the tourism economy?

- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.
- It can also carefully monitor its successes and future needs.
- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e. tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

- Most economic sectors such as financial services, insurance, or construction are easily defined within a country's national accounts statistics.
- Tourism is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Tourism spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents...

Methods and data sources

- Domestic visitor expenditure estimates are provided by DKSA representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics then adjusts these levels of spending based on a range of known measures of tourism activity:
 - Industry data on employment, wages, GDP, and sales (source: BEA, BLS, Census)
 - STR data on hotel revenues
 - Bed tax receipts (various)
 - Gross receipts tax by industry (Guam Department of Revenue)
 - Overseas visitor spending (source: NTTU, TE)
 - Canada visitor spending (source: Statistics Canada, TE)
 - Spending on air travel which accrues to all airports and locally-based airlines
 - Gasoline purchases by visitors (source: TE calculation)

Definitions

- **Direct Impact:** The economic impact – including jobs and income – from the initial sales made by travelers. Examples include sales made by travelers at lodging properties, souvenir shops, restaurants, gas stations, amusement parks, museums, etc.
- **Indirect Impact:** The economic impact from the production, employment, and income occurring in other businesses/industries that supply the businesses making initial/direct sales to travelers. Examples include a restaurant's food supplier or a hotel's laundry service.
- **Induced Impact:** The economic impact from the spending by households in the local economy as the result of the earnings from a business that directly or indirectly interacts with travelers. Examples include a hotel desk clerk using the wages he earned to pay for his groceries or the accountant who works for a company that supplies napkins to a restaurant frequented by travelers using her wages to purchase flowers from her local florist.



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