



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2015 Market Segmentation

3RD QTR. (APR~JUN 2015)



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Chinese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **152** departing Taiwanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **152** is +/- 8.0 percentage points with a 95% confidence level. That is, if all Taiwanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 8.0 percentage points.

OBJECTIVES

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - General leisure group
 - Family and/or Child
 - Special interest group
 - Incentive market
 - 20-40 year old
 - Mid-high level income
 - White-collar
 - w/ child
 - Wedding/ Honeymoon
 - Student
 - To identify (for all Taiwanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments

Parameters

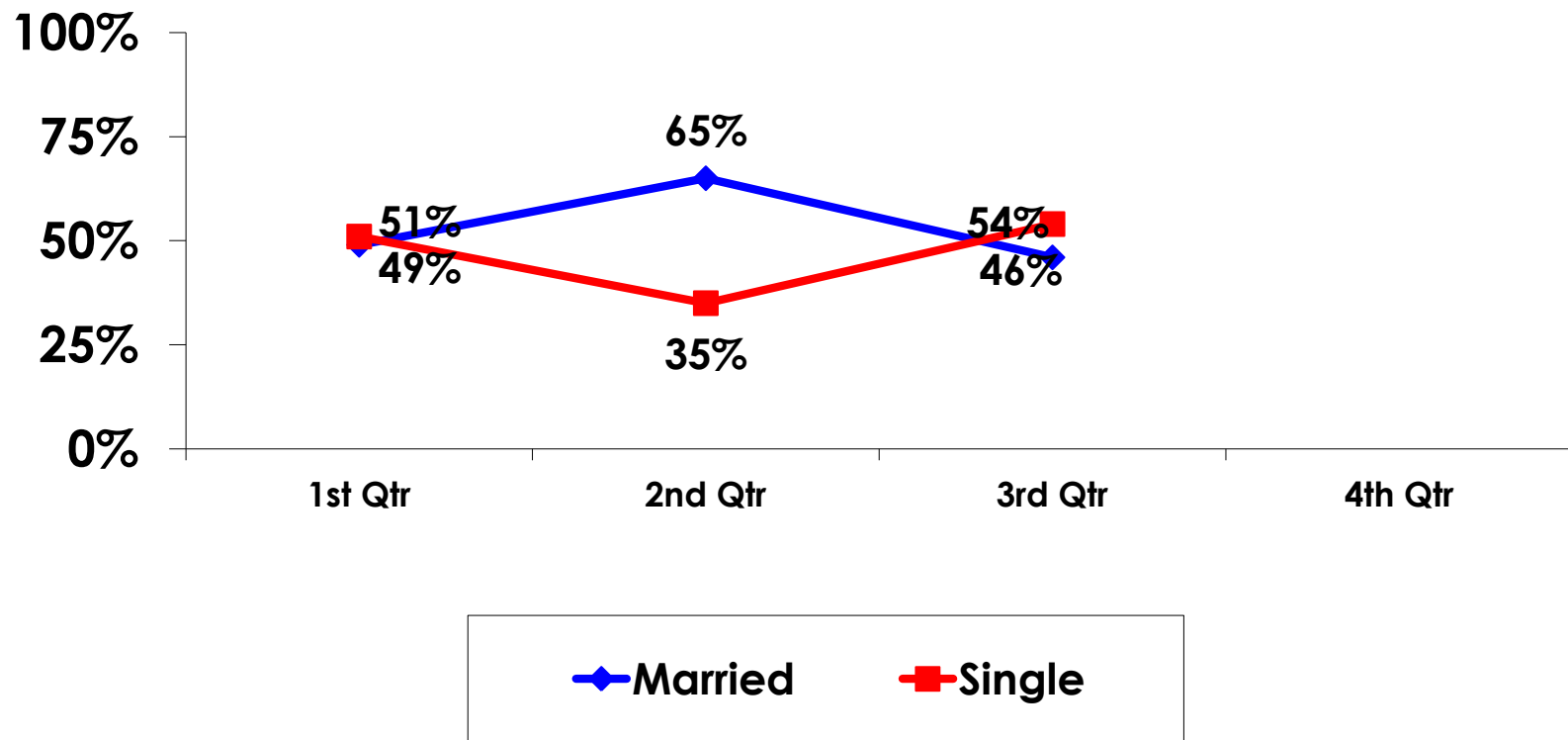
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	50%	43%	41%	
Child	9%	25%	9%	
Incentive market	5%	-	3%	
Male 20-40	36%	35%	40%	
Female 20-40	48%	45%	43%	
White collar	56%	57%	47%	
Wedding/ Honeymooner	17%	25%	15%	
Student	3%	9%	17%	
Mid-High income	40%	29%	40%	
TOTAL	150	150	152	

SECTION 1 **PROFILE OF RESPONDENTS**

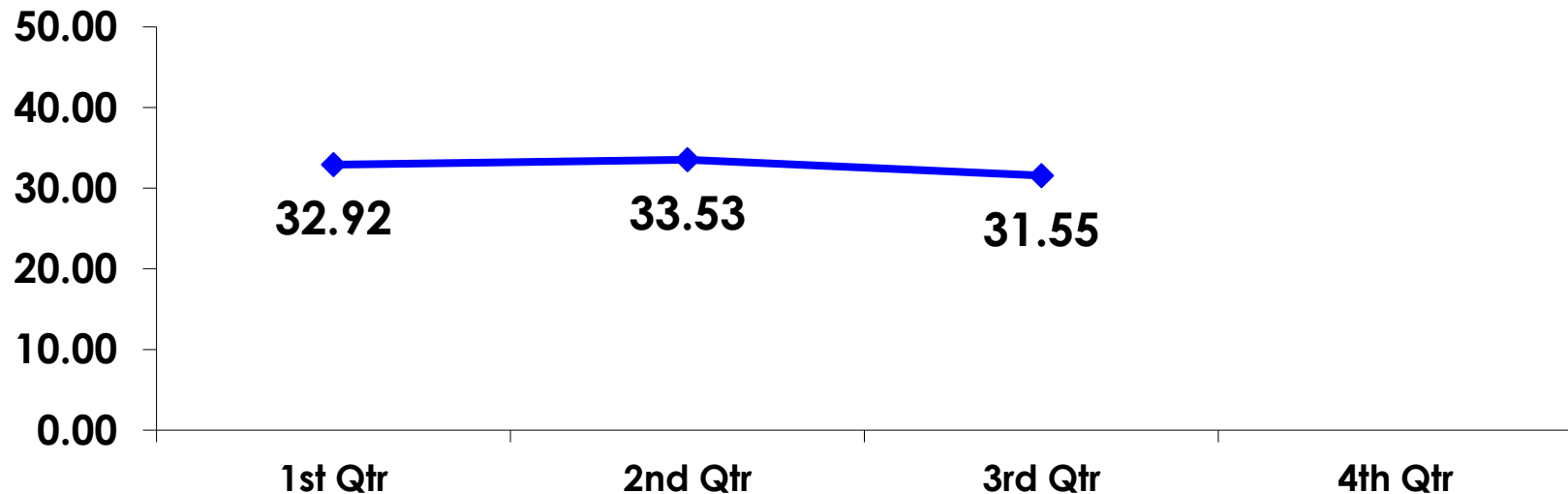
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QE	Married	Count	70	21	12	2	30	24	40	20	1	22
		Column N %	46%	33%	92%	40%	49%	36%	56%	91%	4%	36%
	Single	Count	82	42	1	3	31	42	32	2	25	39
		Column N %	54%	67%	8%	60%	51%	64%	44%	9%	96%	64%
	Total	Count	152	63	13	5	61	66	72	22	26	61

AVERAGE AGE - TRACKING



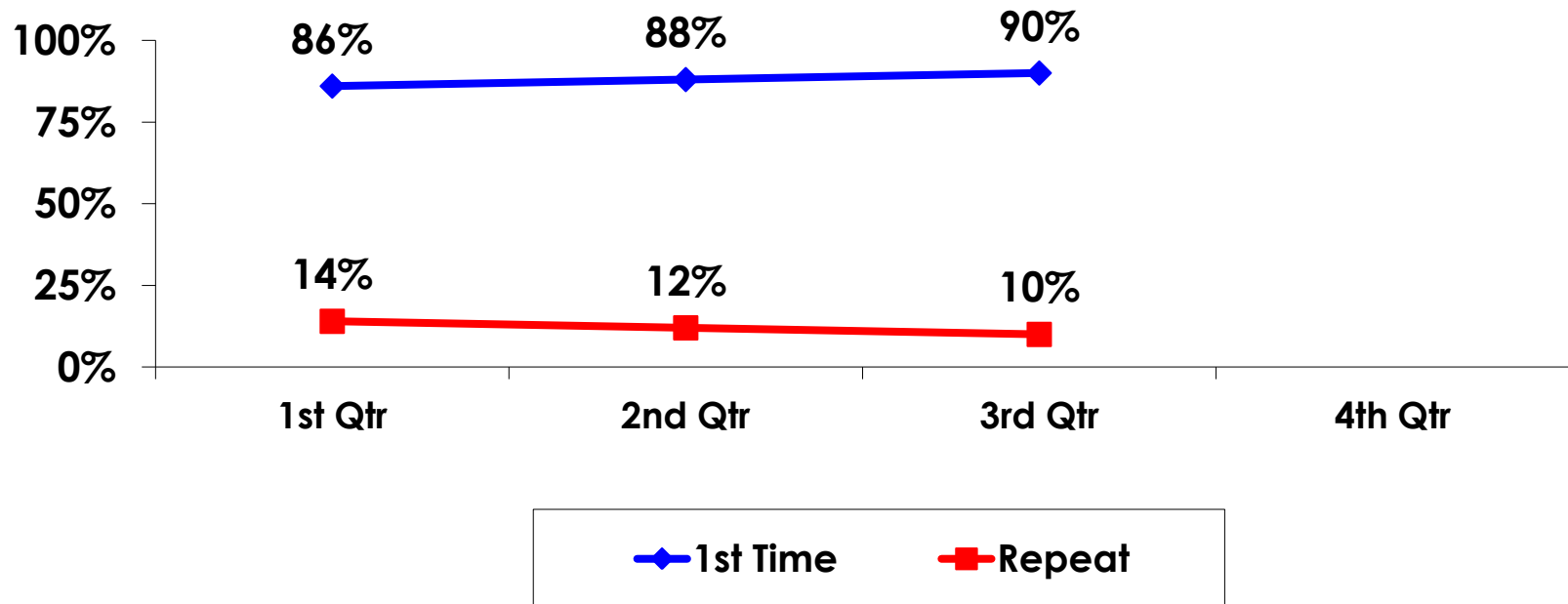
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	35	24	0	0	13	16	5	2	25	16
		Column N %	23%	38%	0%	0%	21%	24%	7%	9%	96%	26%
	25-34	Count	76	30	6	3	34	42	41	16	1	29
		Column N %	50%	48%	46%	60%	56%	64%	57%	73%	4%	48%
	35-49	Count	34	7	6	2	14	8	24	2	0	14
		Column N %	22%	11%	46%	40%	23%	12%	33%	9%	0%	23%
	50+	Count	7	2	1	0	0	0	2	2	0	2
		Column N %	5%	3%	8%	0%	0%	0%	3%	9%	0%	3%
	Total	Count	152	63	13	5	61	66	72	22	26	61
QF		Mean	31.55	28.37	36.92	33.00	30.34	28.58	33.08	31.82	20.88	30.87
		Median	31	27	36	33	32	30	33	29	21	30

INCOME - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q26 <=NT160K	Count		19	9	1	1	4	11	10	3	7	0
	Column N %		13%	14%	8%	20%	7%	17%	14%	14%	27%	0%
NT160K-NT200K	Count		13	3	1	0	3	8	7	1	1	0
	Column N %		9%	5%	8%	0%	5%	12%	10%	5%	4%	0%
NT200K-NT400K	Count		13	7	0	0	7	5	7	3	4	0
	Column N %		9%	11%	0%	0%	11%	8%	10%	14%	15%	0%
NT400K-NT600K	Count		35	18	1	3	11	21	15	5	5	35
	Column N %		23%	29%	8%	60%	18%	32%	21%	23%	19%	57%
NT600K-NT800K	Count		26	9	2	0	15	7	8	3	5	26
	Column N %		17%	14%	15%	0%	25%	11%	11%	14%	19%	43%
NT800K-NT1.0M	Count		20	8	4	1	8	7	12	3	1	0
	Column N %		13%	13%	31%	20%	13%	11%	17%	14%	4%	0%
NT1.0M+	Count		22	9	3	0	11	7	12	4	3	0
	Column N %		14%	14%	23%	0%	18%	11%	17%	18%	12%	0%
No Income	Count		4	0	1	0	2	0	1	0	0	0
	Column N %		3%	0%	8%	0%	3%	0%	1%	0%	0%	0%
Total	Count		152	63	13	5	61	66	72	22	26	61

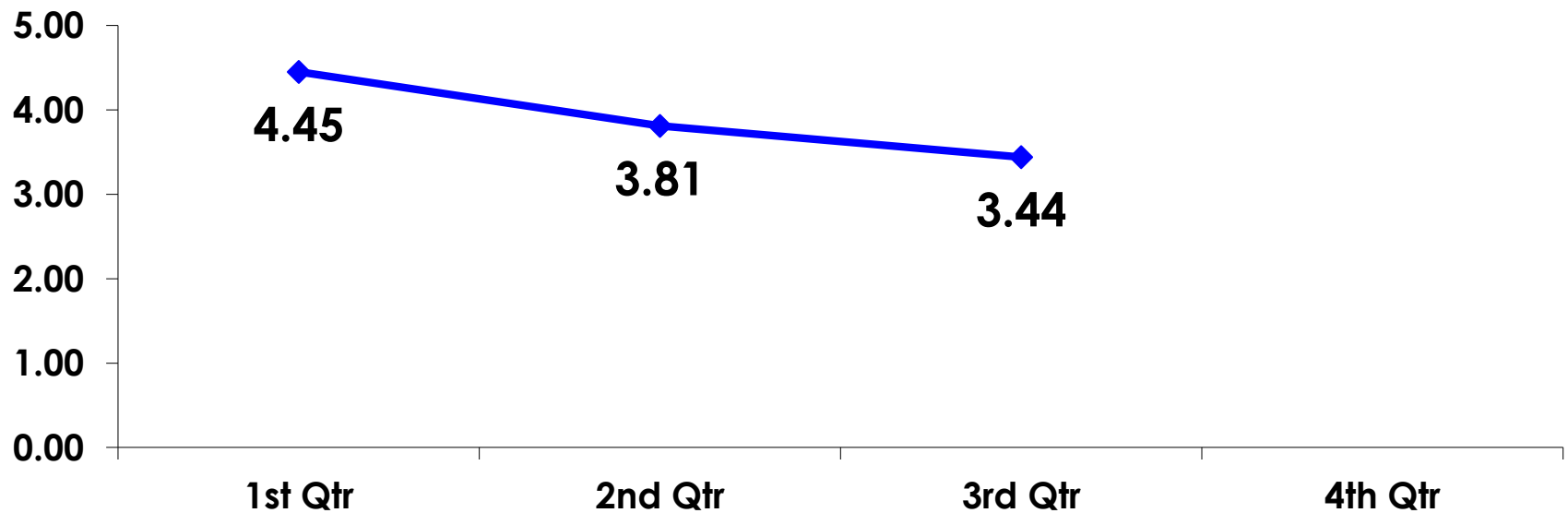
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	136	59	9	5	53	65	63	22	26	58
		Column N %	90%	94%	69%	100%	87%	98%	89%	100%	100%	97%
	No	Count	15	4	4	0	8	1	8	0	0	2
		Column N %	10%	6%	31%	0%	13%	2%	11%	0%	0%	3%
	Total	Count	151	63	13	5	61	66	71	22	26	60

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
Q8	Mean	3.44	3.45	3.31	3.00	3.34	3.38	3.47	3.55	3.71	3.53
	Median	3	3	3	3	3	3	3	4	4	3

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	64	26	6	0	22	31	32	11	13	29
		Column N %	42%	41%	46%	0%	37%	47%	44%	50%	52%	48%
	Free-time package tour	Count	64	28	5	0	29	25	28	9	7	22
		Column N %	42%	44%	38%	0%	48%	38%	39%	41%	28%	36%
	Individually arranged travel (FIT)	Count	15	7	2	0	7	5	7	2	4	7
		Column N %	10%	11%	15%	0%	12%	8%	10%	9%	16%	11%
	Group tour	Count	1	0	0	0	1	0	0	0	0	0
		Column N %	1%	0%	0%	0%	2%	0%	0%	0%	0%	0%
	Company paid travel	Count	5	1	0	5	1	4	5	0	0	3
		Column N %	3%	2%	0%	100%	2%	6%	7%	0%	0%	5%
	Other	Count	2	1	0	0	0	1	0	0	1	0
		Column N %	1%	2%	0%	0%	0%	2%	0%	0%	4%	0%
	Total	Count	151	63	13	5	60	66	72	22	25	61

TRAVEL MOTIVATION - SEGMENTATION

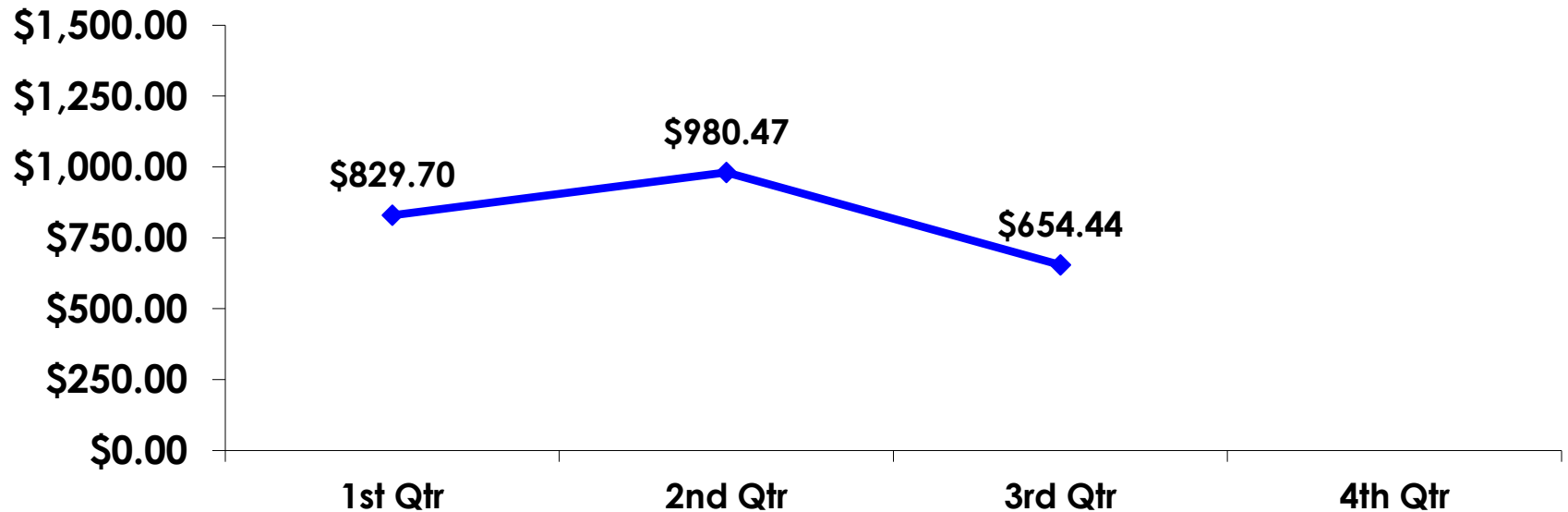
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	7%	5%	31%	0%	8%	2%	7%	0%	0%	2%	
	Price	11%	19%	0%	0%	8%	12%	10%	9%	24%	13%	
	Visit friends/ Relatives	4%	5%	0%	0%	5%	3%	4%	9%	4%	3%	
	Recomm- friend/family/trvl agnt	27%	38%	8%	0%	25%	27%	25%	23%	48%	23%	
	Scuba	26%	38%	8%	0%	25%	29%	15%	23%	52%	30%	
	Water sports	21%	33%	0%	20%	23%	20%	11%	5%	48%	20%	
	Short travel time	7%	10%	15%	0%	12%	5%	6%	0%	12%	3%	
	Golf	1%	3%	0%	0%	3%	0%	0%	0%	4%	2%	
	Relax	37%	89%	8%	20%	38%	38%	29%	32%	56%	41%	
	Company/ Business Trip	5%	0%	0%	20%	2%	5%	6%	0%	0%	3%	
	Safe	22%	37%	38%	0%	17%	27%	15%	14%	36%	23%	
	Natural beauty	72%	86%	100%	40%	68%	80%	64%	64%	88%	70%	
	Shopping	44%	49%	31%	0%	42%	48%	40%	27%	76%	41%	
	Career Cert/ Testing	1%	0%	0%	0%	2%	0%	1%	0%	0%	0%	
	Married/ Attn wedding	3%	2%	0%	0%	2%	3%	6%	23%	0%	2%	
	Honeymoon	12%	10%	0%	0%	13%	15%	15%	82%	0%	11%	
	Pleasure	11%	25%	8%	0%	8%	8%	6%	0%	40%	8%	
	Organized sports	2%	3%	0%	0%	3%	0%	0%	0%	8%	2%	
	No Visa requirement	21%	27%	15%	0%	15%	21%	21%	9%	32%	10%	
	Other	4%	3%	0%	20%	3%	6%	6%	0%	0%	7%	
	Total	Count	151	63	13	5	60	66	72	22	25	61

INFORMATION SOURCES - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q1	Internet	53%	55%	62%	60%	64%	52%	65%	45%	46%	51%	
	Friend/ Relative	41%	47%	23%	0%	38%	45%	37%	45%	69%	41%	
	Travel Agent Brochure	31%	37%	8%	0%	26%	27%	20%	32%	50%	29%	
	TV	24%	34%	23%	0%	20%	26%	21%	23%	38%	20%	
	Travel Guidebook- Bookstore	19%	29%	0%	0%	16%	23%	20%	14%	23%	24%	
	Magazine (Consumer)	12%	19%	8%	0%	13%	8%	7%	9%	15%	10%	
	Consumer Trvl Show	10%	15%	8%	0%	11%	9%	11%	5%	19%	14%	
	Co-Worker/ Company Trvl Dept	10%	11%	15%	80%	5%	12%	15%	5%	4%	12%	
	Travel Trade Show	9%	13%	15%	0%	7%	14%	11%	14%	4%	10%	
	GVB Promo	9%	11%	23%	0%	7%	8%	6%	0%	23%	7%	
	Prior Trip	5%	3%	8%	0%	7%	0%	6%	0%	0%	2%	
	Newspaper	4%	8%	0%	0%	2%	0%	1%	0%	19%	3%	
	GVB Office	1%	2%	0%	0%	2%	0%	0%	0%	0%	0%	
	Total	Count	150	62	13	5	61	66	71	22	26	59

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$820.80

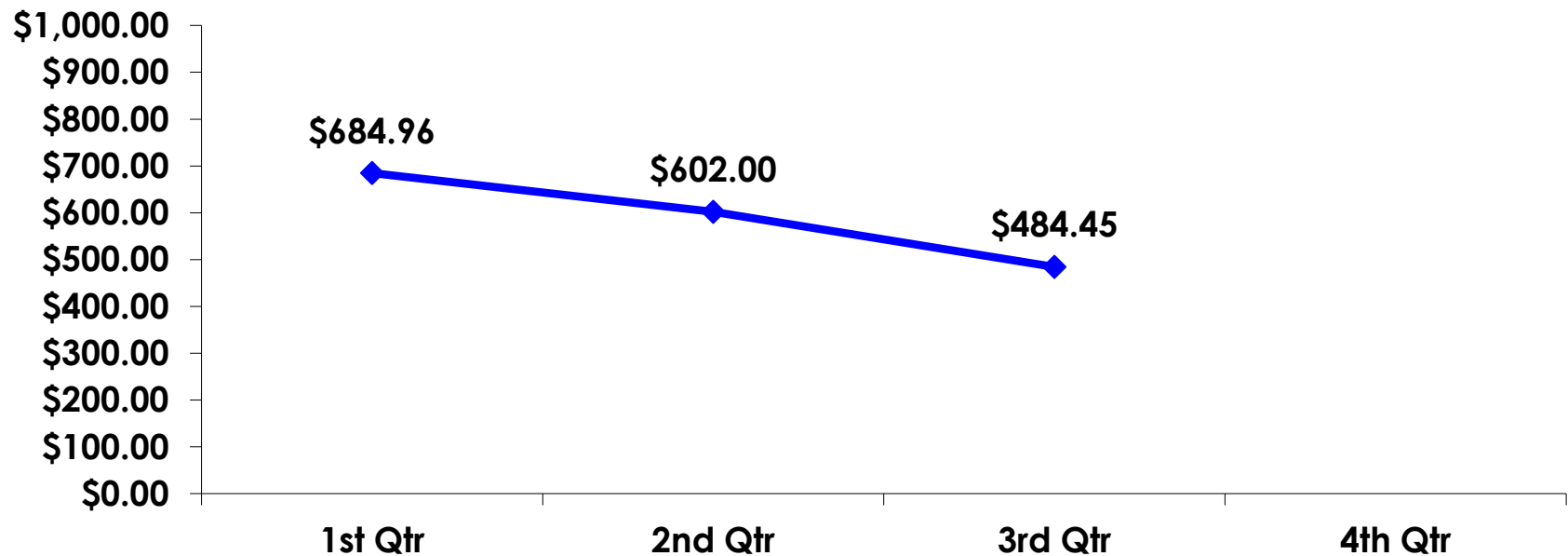
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$654.44	\$750.52	\$574.69	\$195.12	\$651.60	\$628.49	\$614.04	\$459.72	\$801.60	\$583.01
	Median	\$779	\$813	\$569	\$0	\$748	\$779	\$759	\$488	\$813	\$683
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,049	\$2,049	\$1,301	\$976	\$1,301	\$2,049	\$1,301	\$1,138	\$1,951	\$2,049

PREPAID EXPENDITURES

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
AIR & HOTEL	Mean	\$1,024.09	\$1,076.56	\$1,557.07		\$1,059.68	\$976.95	\$1,005.91	\$1,140.53	\$818.97	\$1,068.72
	Minimum	\$407	\$667	\$420		\$407	\$420	\$407	\$667	\$566	\$520
	Maximum	\$3,252	\$2,276	\$3,252		\$3,252	\$2,276	\$2,276	\$2,276	\$1,073	\$2,276
AIR/ HOTEL/ MEAL	Mean	\$1,060.48	\$1,006.67	\$1,892.68	\$975.61	\$970.32	\$997.36	\$1,110.57	\$1,181.57	\$900.28	\$1,027.82
	Minimum	\$566	\$569	\$976	\$976	\$566	\$569	\$615	\$748	\$650	\$566
	Maximum	\$3,902	\$2,055	\$3,902	\$976	\$1,984	\$2,055	\$3,902	\$1,984	\$1,255	\$2,055
AIR ONLY	Mean	\$1,219.51	\$1,626.02	\$1,626.02		\$1,626.02	\$813.01	\$1,626.02		\$813.01	\$813.01
	Minimum	\$813	\$1,626	\$1,626		\$1,626	\$813	\$1,626		\$813	\$813
	Maximum	\$1,626	\$1,626	\$1,626		\$1,626	\$813	\$1,626		\$813	\$813
HOTEL ONLY	Mean	.	.	.		.	.	.	.	.	.
	Minimum	.	.	.		.	.	.	.	.	.
	Maximum	.	.	.		.	.	.	.	.	.
HOTEL & MEAL	Mean	.	.	.		.	.	.	.	.	.
	Minimum	.	.	.		.	.	.	.	.	.
	Maximum	.	.	.		.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.		.	.	.	.	.	.
	Minimum	.	.	.		.	.	.	.	.	.
	Maximum	.	.	.		.	.	.	.	.	.
TRANS- TAIWAN	Mean	\$36.18	\$40.33			\$37.79	\$16.04	\$38.26	\$65.04	\$46.50	\$24.07
	Minimum	\$10	\$10			\$10	\$16	\$10	\$65	\$15	\$15
	Maximum	\$98	\$78			\$98	\$16	\$98	\$65	\$78	\$33
TRANS- GUAM	Mean	.	.	.		.	.	.	.	.	.
	Minimum	.	.	.		.	.	.	.	.	.
	Maximum	.	.	.		.	.	.	.	.	.
OPT TOURS	Mean	\$373.98				\$487.80	\$260.16	\$260.16			\$373.98
	Minimum	\$260				\$488	\$260	\$260			\$260
	Maximum	\$488				\$488	\$260	\$260			\$488
OTHER	Mean	\$566.78	\$495.93			\$601.63	\$536.59	\$455.28	\$162.60	\$617.89	\$975.61
	Minimum	\$163	\$195			\$195	\$163	\$163	\$163	\$618	\$976
	Maximum	\$1,008	\$976			\$1,008	\$976	\$1,008	\$163	\$618	\$976
TOTAL	Mean	\$865.07	\$926.21	\$1,451.91	\$195.12	\$879.56	\$784.72	\$849.02	\$695.49	\$817.49	\$746.73
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,902	\$2,589	\$3,902	\$976	\$3,252	\$2,276	\$3,902	\$2,276	\$1,951	\$2,276

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$590.00

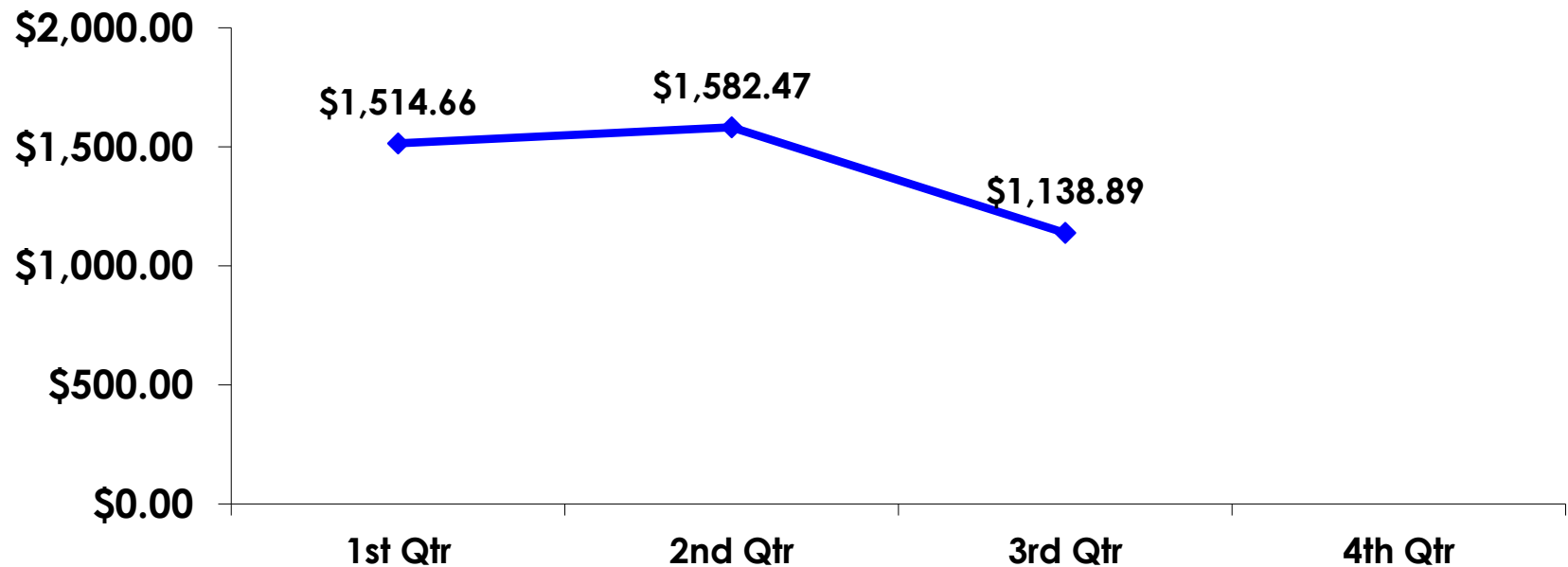
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$484.45	\$457.11	\$376.24	\$542.40	\$529.31	\$448.67	\$471.94	\$351.00	\$613.40	\$453.89
	Median	\$384	\$400	\$378	\$112	\$465	\$327	\$300	\$159	\$500	\$378
	Minimum	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,650	\$2,300	\$667	\$2,300	\$2,300	\$2,453	\$2,650	\$2,113	\$1,730	\$2,453

ON-ISLAND EXPENSE- BREAKDOWN

	TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
	-	-	-	-	-	-	-	-	-	-
	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean	Mean
F&B HOTEL	\$7.72	\$8.73	\$53.08	\$0.00	\$12.80	\$3.21	\$13.24	\$4.55	\$2.58	\$4.57
F&B FF/STORE	\$34.04	\$18.63	\$34.54	\$5.00	\$48.90	\$24.65	\$45.17	\$52.36	\$7.38	\$28.25
F&B RESTRNT	\$43.24	\$24.24	\$85.69	\$1.00	\$56.18	\$22.14	\$50.86	\$65.91	\$28.46	\$19.57
OPT TOUR	\$70.86	\$63.25	\$54.62	\$0.00	\$61.11	\$72.85	\$64.72	\$32.73	\$72.04	\$57.43
GIFT- SELF	\$105.30	\$105.49	\$119.62	\$16.00	\$106.52	\$109.97	\$89.76	\$100.45	\$96.92	\$75.66
GIFT- OTHER	\$88.24	\$96.22	\$142.38	\$248.00	\$89.46	\$92.06	\$116.71	\$37.27	\$130.00	\$58.11
TRANS	\$24.41	\$23.41	\$62.38	\$0.40	\$32.59	\$17.11	\$28.21	\$17.64	\$7.73	\$20.54
OTHER	\$209.98	\$213.92	\$181.08	\$272.00	\$260.90	\$162.44	\$174.68	\$97.00	\$321.23	\$237.43
TOTAL	\$584.57	\$553.08	\$754.15	\$542.40	\$666.84	\$508.64	\$581.96	\$407.91	\$664.04	\$506.11

TOTAL EXPENDITURES – TRACKING



YTD=\$1,410.80

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,138.89	\$1,207.63	\$950.93	\$737.52	\$1,180.92	\$1,077.17	\$1,085.98	\$810.72	\$1,415.00	\$1,036.90
	Median	\$1,128	\$1,215	\$976	\$200	\$1,169	\$1,027	\$1,050	\$643	\$1,266	\$1,020
	Minimum	\$0	\$0	\$200	\$50	\$0	\$0	\$0	\$0	\$580	\$0
	Maximum	\$3,505	\$3,049	\$1,801	\$2,300	\$2,959	\$3,458	\$3,505	\$2,959	\$2,911	\$3,458

SECTION 4 **ADVANCED STATISTICS**

ANALYSIS TECHNIQUE

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, 1st,2nd,3rd Qtr and Overall 1-3 Qtr 2015

	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2015
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around			4	8
Safety walking around at night				
Quality of daytime tours		1		1
Variety of daytime tours			5	
Quality of nighttime tours				
Variety of nighttime tours	4			7
Quality of shopping				
Variety of shopping				
Price of things on Guam			3	5
Quality of hotel accommodations	2	2		2
Quality/cleanliness of air, sky	3			6
Quality/cleanliness of parks			1	
Quality of landscape in Tumon				
Quality of landscape in Guam				4
Quality of ground handler	1			
Quality/cleanliness of transportation vehicles		3	2	3
% of Per Person On Island Expenditures Accounted For	51.6%	55.7%	50.6%	53.6%
NOTE: Only significant drivers are included.				

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by five significant factors in the Third Quarter 2015 Period. By rank order they are:
 - **Quality/cleanliness of parks,**
 - **Quality/cleanliness of transportation vehicles,**
 - **Price of things on Guam,**
 - **Ease of getting around, and**
 - **Variety of daytime tours.**
- With these five factors the overall r^2 is .506 meaning that **50.6% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd Qtrs 2015, and Overall 1-3rd Qtrs 2015				
	1st Qtr	2nd Qtr	3rd Qtr	Combin ed 1-3 Qtr 2015
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around				
Safety walking around at night	1			3
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				4
Variety of nighttime tours				
Quality of shopping				
Variety of shopping		2	2	1
Price of things on Guam				
Quality of hotel accommodations				
Quality/cleanliness of air, sky			1	
Quality/cleanliness of parks				
Quality of landscape in Tumon		1		2
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	4.8%	10.3%	6.0%	6.8%
NOTE: Only significant drivers are included.				

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Taiwan visitors on Guam is driven by two significant factors in the Third Quarter 2015 Period. By rank order, they are:
 - **Quality/cleanliness of air, sky, and**
 - **Variety of shopping.**
- With these two factors the overall r^2 is .060 meaning that **6.0% of per person on island expenditure is accounted for by these factors.**