



GUAM VISITORS BUREAU

Taiwan Visitor Tracker Exit Profile

FY2014 Market Segmentation

3rd Qtr. (APR~JUN 2014)



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 **150** 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 **150** 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

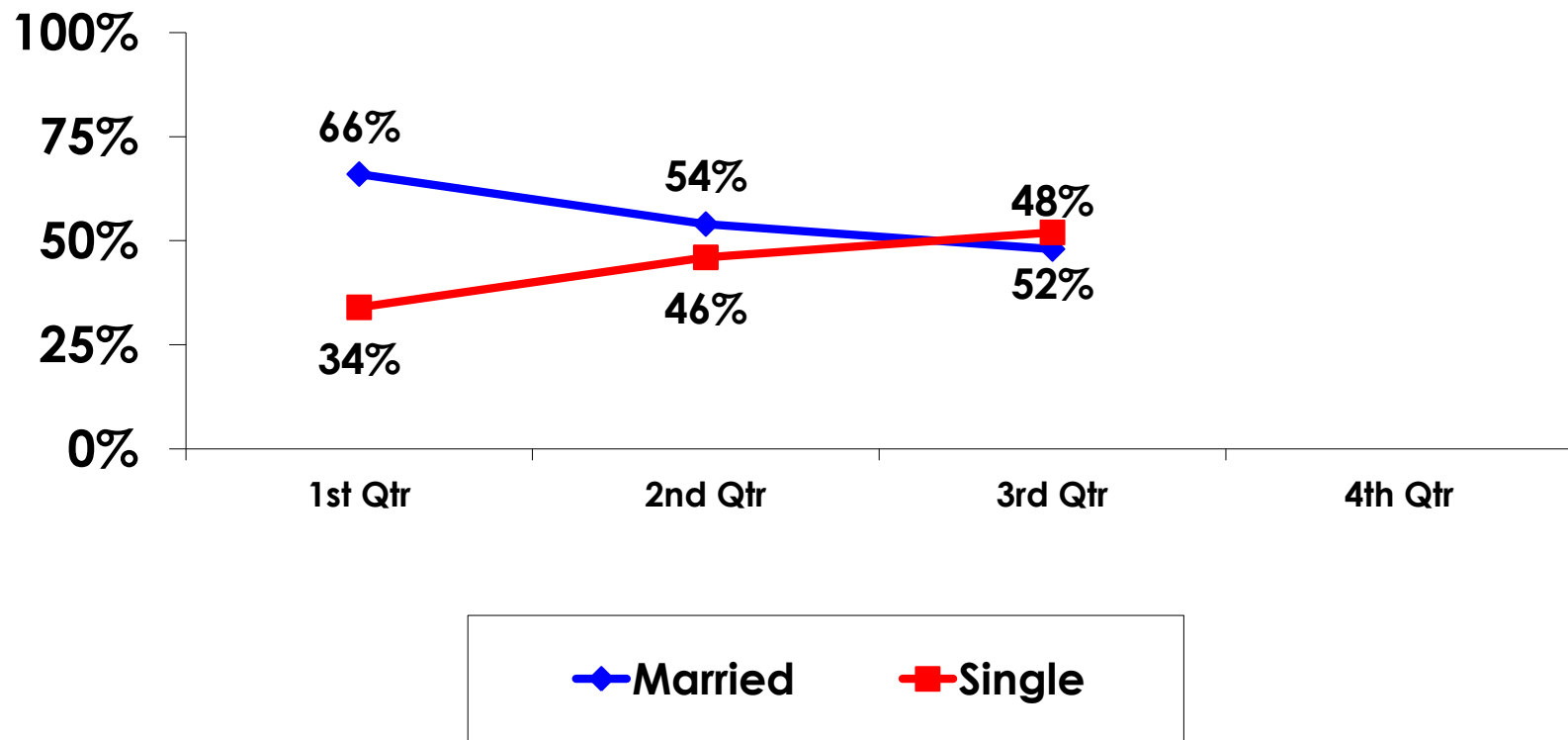
- General leisure group – Q.5A
- Family and/or Child – Q.6
- Special interest group – Q.18/Q7
- Incentive market – Q.5A/Q.7
- 20-40 year old – Q.F
- Mid-high level income – Q.26
- White-collar – Q.25
- W/child – Q.6
- Wedding/ Honeymoon – Q.5A/ Q.13
- Student –Q.25

Highlighted Segments

	1 st QTR	2 nd QTR	3 rd QTR	4 th QTR
General leisure group	27%	37%	41%	
Child	17%	9%	14%	
Incentive market	3%	6%	2%	
Male 20-40	43%	44%	35%	
Female 20-40	33%	41%	39%	
White collar	46%	51%	54%	
Wedding/ Honeymooner	5%	8%	8%	
Student	6%	4%	9%	
Mid-High income	45%	42%	39%	
TOTAL	150	150	150	

SECTION 1 **PROFILE OF RESPONDENTS**

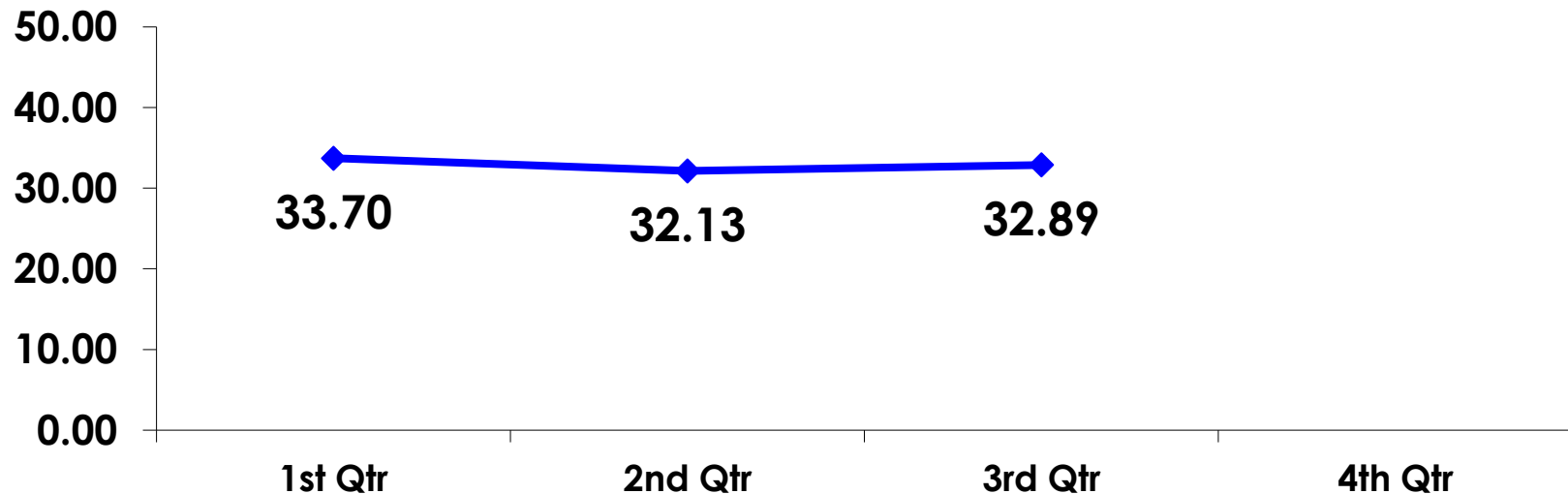
MARITAL STATUS - TRACKING



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	72	29	18	2	27	17	38	11	1	29
		Column N %	48%	47%	86%	67%	52%	29%	47%	92%	7%	49%
	Single	Count	78	33	3	1	25	42	43	1	13	30
		Column N %	52%	53%	14%	33%	48%	71%	53%	8%	93%	51%
	Total	Count	150	62	21	3	52	59	81	12	14	59

AVERAGE AGE - TRACKING



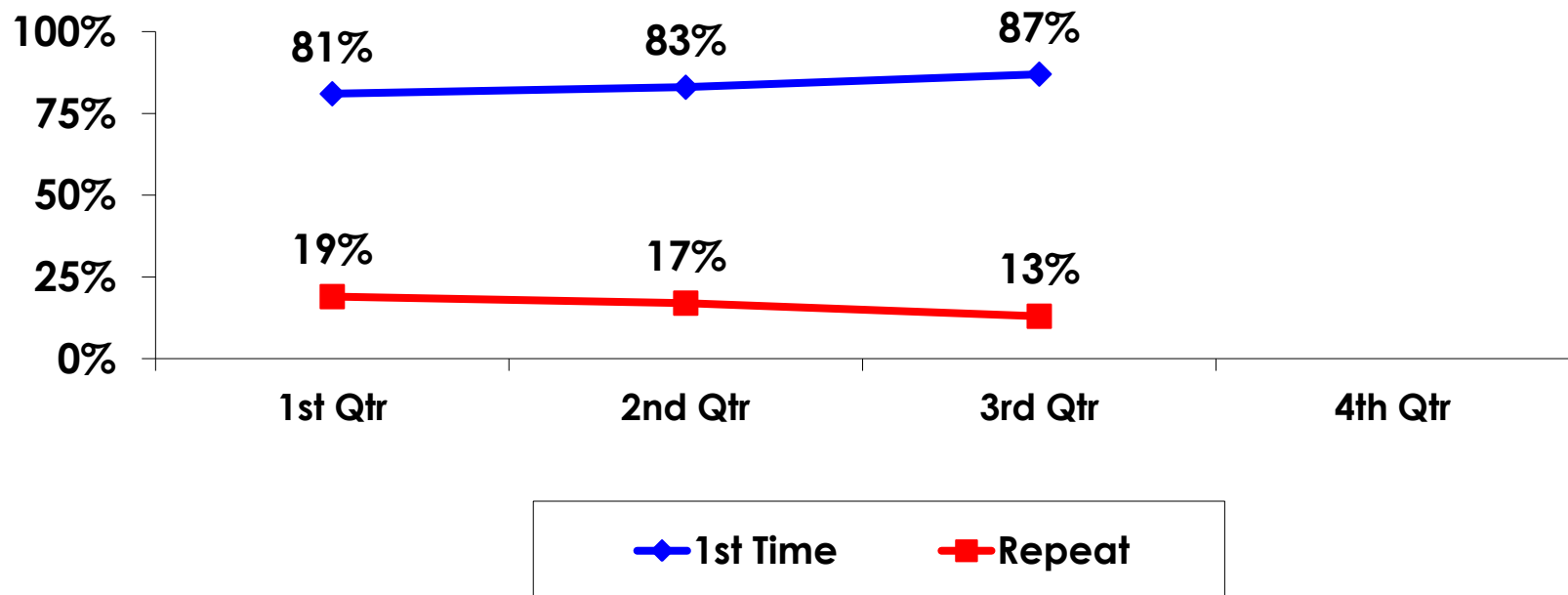
AGE- SEGMENTATION

			TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
			-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	26	12	3	0	4	14	7	1	12	5
		Column N %	17%	19%	14%	0%	8%	24%	9%	8%	86%	8%
	25-34	Count	75	33	3	0	35	40	46	10	1	39
		Column N %	50%	53%	14%	0%	67%	68%	57%	83%	7%	66%
	35-49	Count	39	13	12	3	13	5	25	1	0	14
		Column N %	26%	21%	57%	100%	25%	8%	31%	8%	0%	24%
	50+	Count	10	4	3	0	0	0	3	0	1	1
		Column N %	7%	6%	14%	0%	0%	0%	4%	0%	7%	2%
	Total	Count	150	62	21	3	52	59	81	12	14	59
QF	Mean		32.89	31.82	38.76	40.00	31.15	28.32	33.25	28.67	22.14	32.22
	Median		31	30	39	40	32	29	32	29	19	31

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	12	5	0	1	5	6	8	1	1	0
		Column N %	9%	9%	0%	33%	11%	11%	10%	9%	8%	0%
	NT160K-NT200K	Count	11	5	0	0	2	9	4	1	3	0
		Column N %	9%	9%	0%	0%	4%	16%	5%	9%	25%	0%
	NT200K-NT400K	Count	12	6	3	0	4	6	9	1	1	0
		Column N %	9%	11%	15%	0%	9%	11%	12%	9%	8%	0%
	NT400K-NT600K	Count	32	13	2	1	17	14	18	2	1	32
		Column N %	25%	23%	10%	33%	38%	25%	23%	18%	8%	54%
	NT600K-NT800K	Count	27	10	5	1	9	13	17	4	0	27
		Column N %	21%	18%	25%	33%	20%	24%	22%	36%	0%	46%
	NT800K-NT1.0M	Count	16	8	4	0	5	5	12	2	0	0
		Column N %	13%	14%	20%	0%	11%	9%	15%	18%	0%	0%
	NT1.0M+	Count	13	7	5	0	3	0	9	0	2	0
		Column N %	10%	13%	25%	0%	7%	0%	12%	0%	17%	0%
	No Income	Count	5	2	1	0	0	2	1	0	4	0
		Column N %	4%	4%	5%	0%	0%	4%	1%	0%	33%	0%
	Total	Count	128	56	20	3	45	55	78	11	12	59

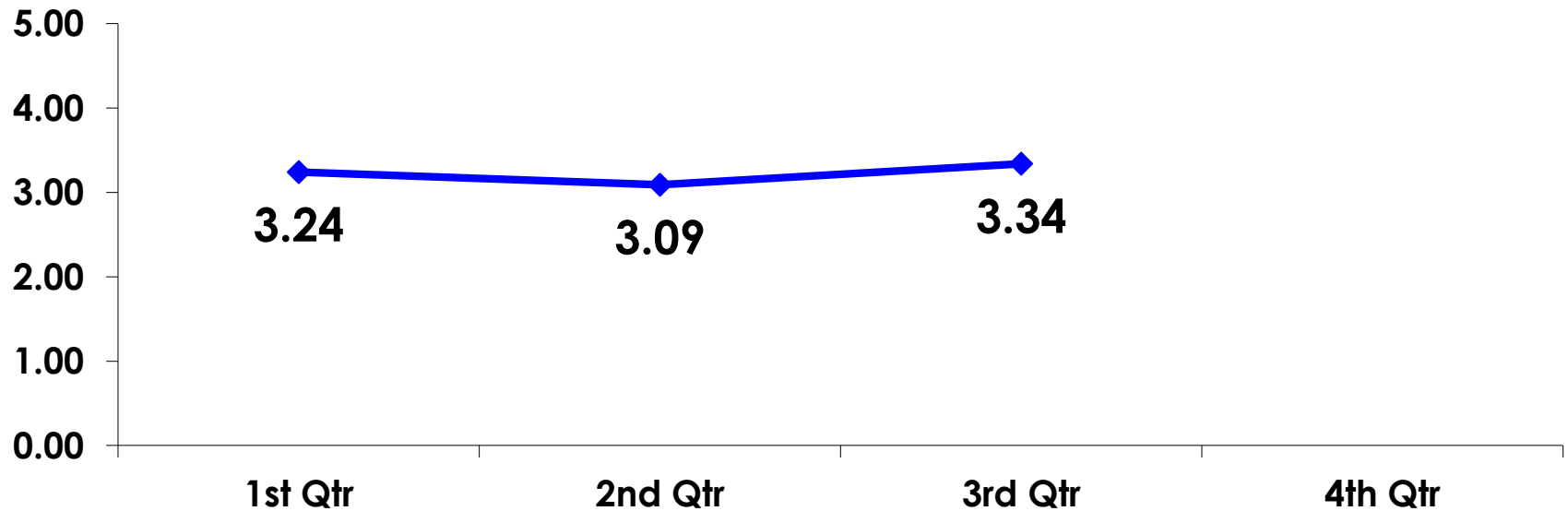
PRIOR TRIPS TO GUAM - TRACKING



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	130	57	17	2	43	55	76	11	11	50
		Column N %	87%	92%	81%	67%	83%	95%	94%	92%	85%	85%
	No	Count	19	5	4	1	9	3	5	1	2	9
		Column N %	13%	8%	19%	33%	17%	5%	6%	8%	15%	15%
	Total	Count	149	62	21	3	52	58	81	12	13	59

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	3.34	3.36	3.57	3.00	3.29	3.25	3.35	3.09	3.57	3.29
	Median	3	3	4	3	3	3	3	3	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	39	20	6	0	16	12	24	6	6	9
		Column N %	27%	33%	30%	0%	31%	20%	30%	50%	43%	16%
	Free-time package tour	Count	74	30	9	0	26	31	39	5	7	31
		Column N %	50%	49%	45%	0%	51%	53%	49%	42%	50%	55%
	Individually arranged travel (FIT)	Count	32	11	5	1	8	16	14	1	1	15
		Column N %	22%	18%	25%	33%	16%	27%	18%	8%	7%	27%
	Company paid travel	Count	2	0	0	2	1	0	2	0	0	1
		Column N %	1%	0%	0%	67%	2%	0%	3%	0%	0%	2%
	Total	Count	147	61	20	3	51	59	79	12	14	56

TRAVEL MOTIVATION - SEGMENTATION

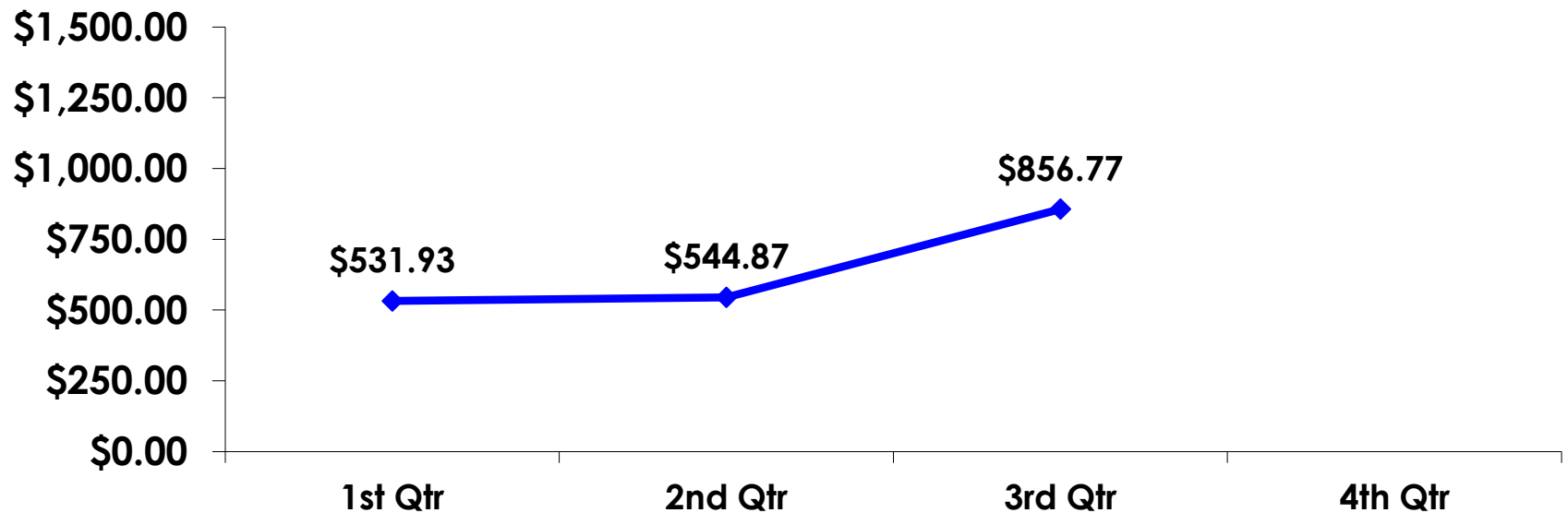
		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME	
		-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	8%	5%	19%	0%	13%	2%	3%	8%	7%	9%	
	Price	13%	18%	19%	0%	15%	12%	20%	17%	7%	12%	
	Visit friends/ Relatives	2%	3%	5%	0%	4%	0%	0%	8%	7%	3%	
	Recomm- friend/family/trvl agnt	23%	23%	29%	0%	21%	25%	28%	25%	50%	16%	
	Scuba	24%	24%	29%	0%	27%	24%	28%	25%	36%	19%	
	Water sports	21%	31%	29%	0%	25%	14%	24%	17%	29%	14%	
	Short travel time	7%	13%	5%	0%	4%	14%	8%	8%	14%	7%	
	Golf	1%	2%	5%	0%	0%	0%	1%	0%	0%	2%	
	Relax	36%	87%	24%	0%	37%	36%	34%	50%	36%	34%	
	Company/ Business Trip	1%	0%	0%	0%	2%	0%	0%	0%	0%	2%	
	Company Sponsored	1%	0%	0%	33%	2%	0%	0%	0%	0%	2%	
	Convention/ Trade/ Conference	3%	0%	0%	33%	0%	3%	4%	0%	0%	5%	
	Safe	21%	32%	33%	0%	23%	22%	21%	25%	21%	21%	
	Natural beauty	68%	69%	67%	67%	67%	71%	76%	75%	71%	53%	
	Shopping	29%	27%	14%	0%	25%	39%	29%	42%	29%	29%	
	Career Cert/ Testing	4%	2%	0%	0%	4%	7%	4%	8%	14%	7%	
	Married/ Attn wedding	2%	2%	5%	0%	2%	3%	1%	25%	0%	3%	
	Honeymoon	7%	10%	0%	0%	13%	7%	8%	92%	0%	9%	
	Pleasure	9%	23%	10%	0%	10%	8%	8%	8%	29%	7%	
	Organized sports	1%	2%	0%	0%	0%	2%	0%	0%	0%	0%	
	No Visa requirement	22%	26%	33%	0%	21%	20%	24%	8%	7%	19%	
	Other	3%	2%	5%	0%	2%	3%	3%	0%	7%	0%	
	Total	Count	149	62	21	3	52	59	80	12	14	58

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	52%	55%	48%	50%	53%	63%	56%	42%	43%	53%	
	Friend/ Relative	34%	40%	67%	0%	35%	27%	39%	42%	50%	22%	
	Travel Agent Brochure	23%	31%	29%	0%	18%	32%	25%	25%	29%	22%	
	TV	23%	27%	33%	0%	20%	19%	21%	25%	21%	19%	
	Travel Guidebook- Bookstore	16%	19%	10%	0%	12%	22%	14%	8%	29%	17%	
	Co-Worker/ Company Trvl Dept	11%	8%	10%	50%	8%	14%	9%	0%	0%	10%	
	Prior Trip	10%	8%	14%	50%	16%	5%	4%	8%	14%	10%	
	Travel Trade Show	9%	10%	19%	0%	8%	10%	13%	25%	7%	8%	
	Magazine (Consumer)	9%	10%	14%	0%	10%	7%	11%	8%	14%	8%	
	GVB Promo	8%	10%	5%	50%	12%	3%	9%	0%	0%	8%	
	Consumer Trvl Show	7%	6%	14%	0%	12%	5%	13%	17%	0%	7%	
	Newspaper	4%	2%	5%	50%	4%	2%	5%	0%	0%	3%	
	GVB Office	3%	5%	0%	0%	0%	2%	3%	0%	7%	0%	
	Theater Ad	1%	2%	5%	0%	0%	2%	1%	0%	0%	0%	
	Radio	1%	0%	0%	0%	2%	2%	3%	0%	0%	2%	
	Other	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
	Total	Count	149	62	21	2	51	59	80	12	14	59

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING

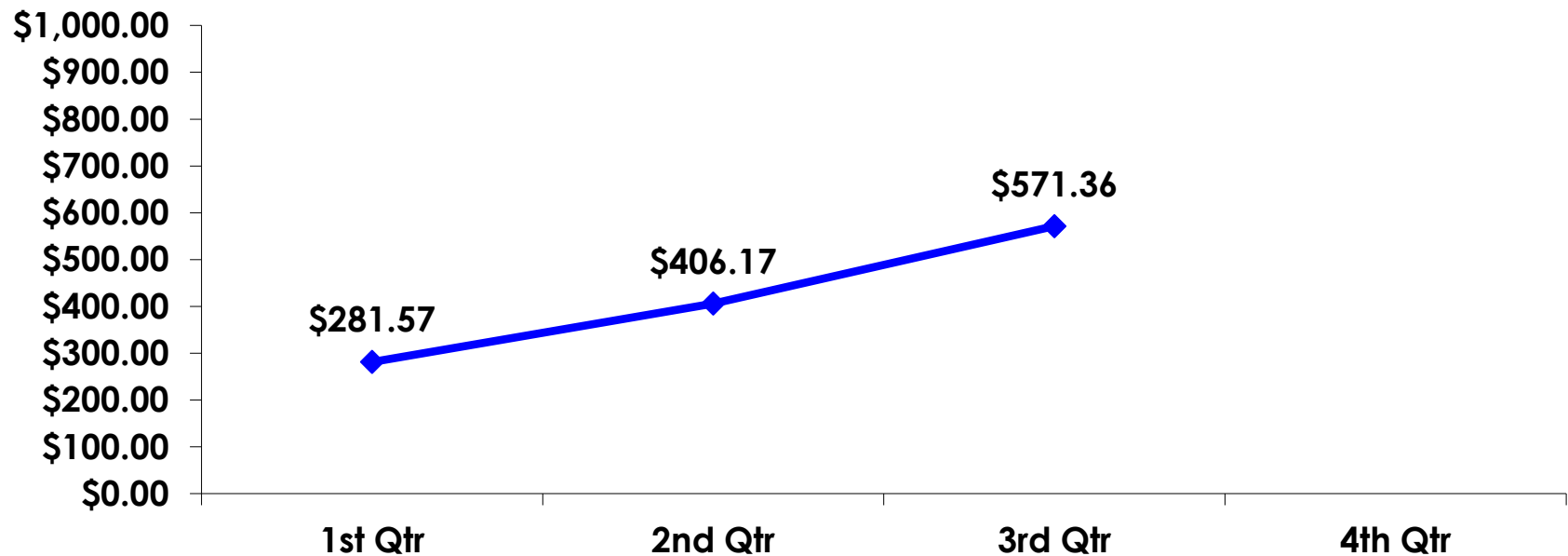


YTD=\$644.52

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	\$856.77	\$861.80	\$713.34	\$444.59	\$1,106.98	\$766.75	\$783.81	\$1,715.16	\$1,028.87	\$1,071.10
	Median	\$825	\$899	\$834	\$0	\$865	\$787	\$897	\$900	\$634	\$722
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,970	\$10,970	\$1,667	\$1,334	\$10,970	\$7,002	\$2,167	\$10,970	\$7,002	\$10,970

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$419.70

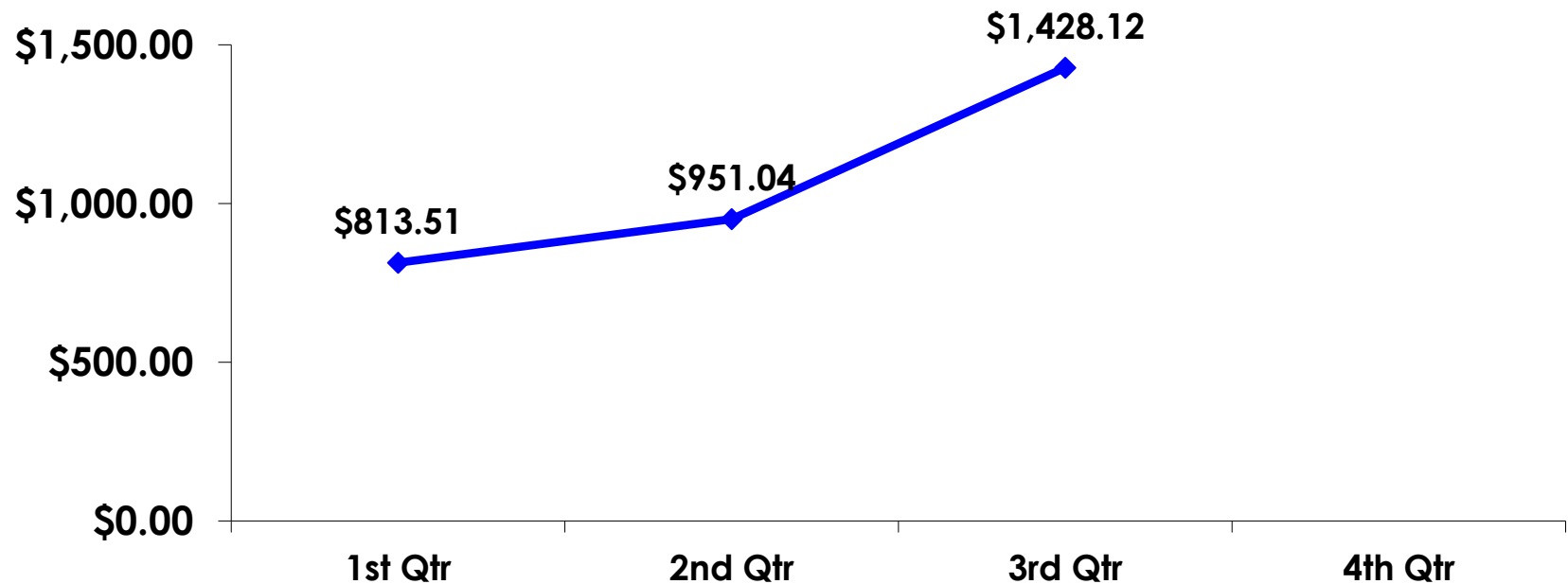
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$571.36	\$571.73	\$364.37	\$333.33	\$708.65	\$594.88	\$771.05	\$345.53	\$138.36	\$530.47
	Median	\$334	\$325	\$267	\$500	\$342	\$397	\$404	\$334	\$98	\$333
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$8,000	\$8,000	\$1,333	\$500	\$8,000	\$6,000	\$8,000	\$1,001	\$500	\$6,000

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	GEN LEISURE GRP	CHILD	INCENTIVE MKT	MALE 20-40	FEMALE 20-40	WHITE COLLAR	WEDDING/ HNYMOON	STUDENT	MID INCOME
		-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$1,253.34	\$1,203.73	\$8,336.11	\$833.61	\$904.91	\$1,060.23	\$1,029.87	\$766.92	\$1,100.37	\$936.59
	Median	\$850	\$1,000	\$8,336	\$834	\$784	\$834	\$834	\$767	\$1,000	\$834
	Minimum	\$486	\$597	\$8,336	\$834	\$486	\$584	\$486	\$767	\$967	\$486
	Maximum	\$8,336	\$1,934	\$8,336	\$834	\$1,801	\$1,934	\$1,801	\$767	\$1,334	\$1,801
AIR/ HOTEL/ MEAL	Mean	\$1,897.73	\$1,977.22	\$2,914.86	.	\$1,857.70	\$1,545.30	\$1,708.83	\$2,787.60	\$3,081.03	\$1,921.06
	Median	\$1,300	\$1,334	\$2,984	.	\$1,334	\$1,144	\$1,300	\$1,334	\$1,334	\$1,234
	Minimum	\$600	\$617	\$1,000	.	\$600	\$767	\$617	\$967	\$600	\$697
	Maximum	\$10,870	\$10,870	\$6,002	.	\$10,870	\$6,335	\$5,002	\$10,870	\$6,335	\$10,870
AIR ONLY	Mean	\$1,975.66	.	\$1,975.66	.	.	\$1,975.66	\$2,000.67	\$2,000.67	.	\$1,975.66
	Median	\$1,976	.	\$1,976	.	.	\$1,976	\$2,001	\$2,001	.	\$1,976
	Minimum	\$1,951	.	\$1,951	.	.	\$1,951	\$2,001	\$2,001	.	\$1,951
	Maximum	\$2,001	.	\$2,001	.	.	\$2,001	\$2,001	\$2,001	.	\$2,001
HOTEL ONLY	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.
	Minimum	.	.	.	.	.	.	.	.	.	.
	Maximum	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	\$100.70	\$100.03	\$42.01	.	.	\$101.03	\$130.04	.	.	\$42.01
	Median	\$100	\$100	\$42	.	.	\$101	\$130	.	.	\$42
	Minimum	\$42	\$100	\$42	.	.	\$42	\$100	.	.	\$42
	Maximum	\$160	\$100	\$42	.	.	\$160	\$160	.	.	\$42
TRANS- TAIWAN	Mean	\$30.59	\$22.26	\$66.69	.	\$39.28	\$24.39	\$17.77	\$26.68	\$32.68	\$45.35
	Median	\$22	\$21	\$67	.	\$43	\$17	\$17	\$27	\$33	\$67
	Minimum	\$3	\$3	\$67	.	\$3	\$8	\$3	\$27	\$33	\$10
	Maximum	\$67	\$43	\$67	.	\$67	\$67	\$43	\$27	\$33	\$67
TRANS- GUAM	Mean	\$54.02	\$47.02	\$33.34	.	\$77.36	\$37.35	\$48.59	\$100.03	\$100.03	\$56.91
	Median	\$33	\$40	\$33	.	\$67	\$32	\$32	\$100	\$100	\$50
	Minimum	\$8	\$8	\$33	.	\$20	\$8	\$8	\$100	\$100	\$8
	Maximum	\$167	\$100	\$33	.	\$167	\$100	\$167	\$100	\$100	\$100
OPT TOURS	Mean	\$378.48	\$473.03	\$700.23	.	\$467.19	\$121.48	\$408.39	\$751.36	\$133.38	\$509.07
	Median	\$200	\$225	\$700	.	\$250	\$113	\$200	\$333	\$133	\$250
	Minimum	\$100	\$100	\$700	.	\$133	\$100	\$100	\$253	\$133	\$100
	Maximum	\$1,667	\$1,667	\$700	.	\$1,667	\$170	\$1,667	\$1,667	\$133	\$1,667
OTHER	Mean	\$580.00	\$330.92	\$250.08	\$500.17	\$556.89	\$597.79	\$735.12	\$687.56	\$300.10	\$576.06
	Median	\$500	\$224	\$250	\$500	\$312	\$567	\$747	\$747	\$300	\$450
	Minimum	\$10	\$13	\$100	\$500	\$13	\$10	\$200	\$10	\$33	\$100
	Maximum	\$1,667	\$800	\$400	\$500	\$1,667	\$1,667	\$1,667	\$1,667	\$567	\$1,667
TOTAL	Mean	\$1,338.30	\$1,262.58	\$2,317.85	\$444.59	\$1,444.05	\$1,035.31	\$1,272.62	\$2,341.61	\$1,398.04	\$1,350.75
	Median	\$1,000	\$1,077	\$2,159	\$0	\$1,077	\$900	\$1,067	\$1,731	\$784	\$1,000
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$10,970	\$10,970	\$8,336	\$1,334	\$10,970	\$7,002	\$5,002	\$10,970	\$7,002	\$10,970

TOTAL EXPENDITURES – TRACKING



YTD=\$1,064.22

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	\$1,428.12	\$1,433.53	\$1,077.70	\$777.93	\$1,815.63	\$1,361.62	\$1,554.86	\$2,060.68	\$1,167.22	\$1,601.57
	Median	\$1,233	\$1,234	\$1,167	\$500	\$1,320	\$1,232	\$1,334	\$1,350	\$815	\$1,050
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$11,287	\$11,287	\$2,967	\$1,834	\$11,287	\$7,112	\$9,134	\$11,287	\$7,112	\$11,287

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 2014				
	1st Qtr	2nd Qtr	3rd Qtr	Combined 1-3 Qtr 2014
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	3		
Ease of getting around				
Safety walking around at night				
Quality of daytime tours	3		3	
Variety of daytime tours		1	2	
Quality of nighttime tours				
Variety of nighttime tours				3
Quality of shopping	2		1	1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations	1	2		2
Quality/cleanliness of air, sky				
Quality/cleanliness of parks		4		
Quality of landscape in Tumon				
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	37.0%	43.9%	29.3%	31.8%
NOTE: Only significant drivers are included.				

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Taiwan visitor's experience on Guam is driven by three significant factors in the Third Quarter 2014 Period. By rank order they are:
 - **Variety of shopping,**
 - **Variety of daytime tours, and**
 - **Quality of daytime tours.**
- With these three factors the overall r^2 is .293 meaning that **29.3% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, 1st,2nd,3rd Qtrs 2014, and Overall 1-3rd Qtrs 2014				
	1st Qtr	2nd Qtr	3rd Qtr	Combined 1-3 Qtr 2014
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around				
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				3
Quality of shopping				
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
Quality/cleanliness of air, sky	1	1		1
Quality/cleanliness of parks				
Quality of landscape in Tumon				
Quality of landscape in Guam				
Quality of ground handler			1	2
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	6.9%	14.3%	3.3%	8.3%

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 one significant factor in the Third Quarter 2014 Period. It is:
 - **Quality of ground handler.**
- With this factor the overall r^2 is .033 meaning that **3.3% of per person on island expenditure is accounted for by this factors.**