

2008 Summer Tourism Season Business Confidence Survey Executive Report

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December 2008

Section One – Overview and Observations

The Survey

The intention of this survey was to gain a general picture of the condition of the tourism industry in the 1000 Islands for the summer season in 2008. It asked businesses to rate their satisfaction with the season's business and compare it to previous years. The survey also asked businesses about their perceptions of the region's tourism business climate looking into the past and future. It also asked opinions on the effect of a number of factors related to the tourism business. The survey was very similar to one that has been conducted since 1999.

The Details:

The charts included after the narrative detail the percentages of answers for every question. The charts also break out the responses from several types of business and from New York and Ontario.

Questionnaires were mailed in September to the TIITC's database of regional businesses of about 1000. Over 281 usable questionnaires were returned. The survey does not represent a scientific sample. It is based on the information voluntarily returned to the TIITC of those on the mailing list. It does reflect a broad cross-section of the 1000 Islands tourism community.

A few observations:

Canada and the United States:

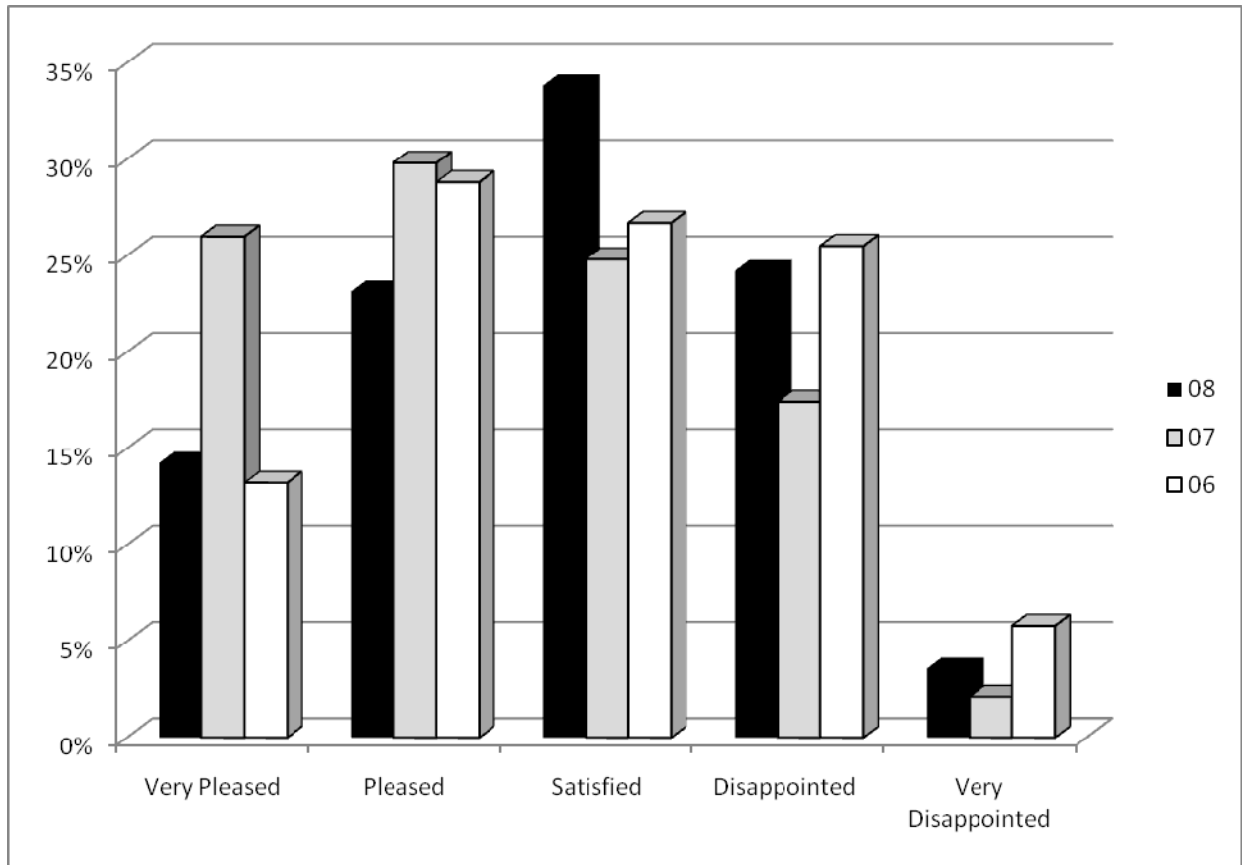
Early in this survey (begun in 1999), Canadian responses were consistently a bit more positive than USA responses. In recent years, the USA responses are slightly more positive. This was notable in this year's questions about the 2008 summer tourism season.

Considering your own business, how would you rate your feelings about this year's summer season?

	USA	Alexandria Bay Area	Cape Vincent Area	Clayton Area	Lakeshore Communities	Watertown Area	CANADA	Brockville- Prescott	Cornwall Seaway Valley	Gananoque & District	Kingston Area
<u>2008</u>											
Very Pleased	30%	19%	31%	32%	35%	36%	23%	17%	25%	15%	34%
Pleased	28%	42%	31%	24%	23%	21%	30%	35%	33%	38%	14%
Satisfied	26%	23%	31%	24%	27%	29%	23%	17%	25%	21%	29%
Disappointed	13%	8%	8%	20%	12%	14%	20%	22%	8%	23%	23%
Very Disappointed	2%	4%	0%	0%	4%	0%	2%	9%	0%	3%	0%
<u>2007</u>											
Very Pleased	17%	20%	8%	13%	12%	46%	15%	9%	21%	13%	13%
Pleased	27%	15%	25%	40%	20%	23%	21%	30%	14%	19%	23%
Satisfied	29%	20%	33%	20%	40%	31%	37%	30%	48%	34%	37%
Disappointed	22%	35%	8%	27%	24%	0%	26%	30%	14%	31%	27%
Very Disappointed	6%	10%	25%	0%	4%	0%	1%	0%	0%	3%	0%
<u>Year to Year Change:</u>											
Very Pleased	-13%	1%	-23%	-19%	-23%	10%	-8%	-8%	-4%	-3%	-21%
Pleased	-1%	-27%	-6%	16%	-3%	2%	-9%	-5%	-19%	-19%	9%
Satisfied	3%	-3%	2%	-4%	13%	2%	14%	13%	23%	13%	8%
Disappointed	9%	27%	0%	7%	12%	-14%	6%	8%	6%	8%	4%
Very Disappointed	-4%	-6%	-25%	0%	0%	0%	1%	9%	0%	0%	0%

Satisfaction with Business:

Both 2006 and 2008 saw relatively more dissatisfaction with business than 2007 or 2005. In 2008, there was a move toward the center "satisfied" response.

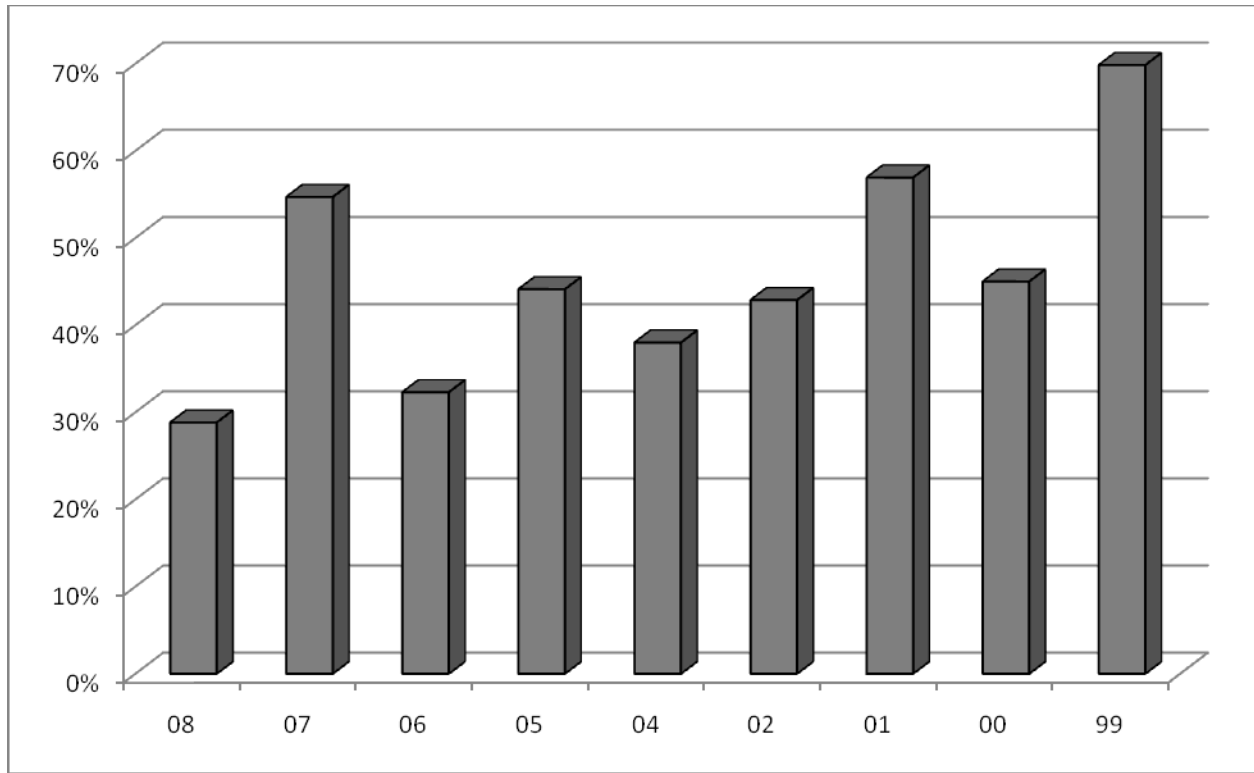


Considering your own business, how would you rate your feelings about this year's summer season?

	08	07	06	05	04	02	01	00	99
Very Pleased	14%	26%	13%	21%	13%	23%	28%	22%	33%
Pleased	23%	30%	29%	34%	28%	27%	31%	23%	43%
Satisfied	34%	25%	27%	26%	29%	31%	26%	31%	13%
Disappointed	24%	17%	26%	17%	28%	17%	12%	25%	10%
Very Disappointed	4%	2%	6%	2%	2%	1%	1%	0%	2%

Improvements from last year:

While businesses reported decent levels of satisfaction, 2008 was described as either flat or weaker than 2007 by most respondents. Only 29% of those responding saw an improvement in 2008 over 2007; the lowest number in the history of the survey.

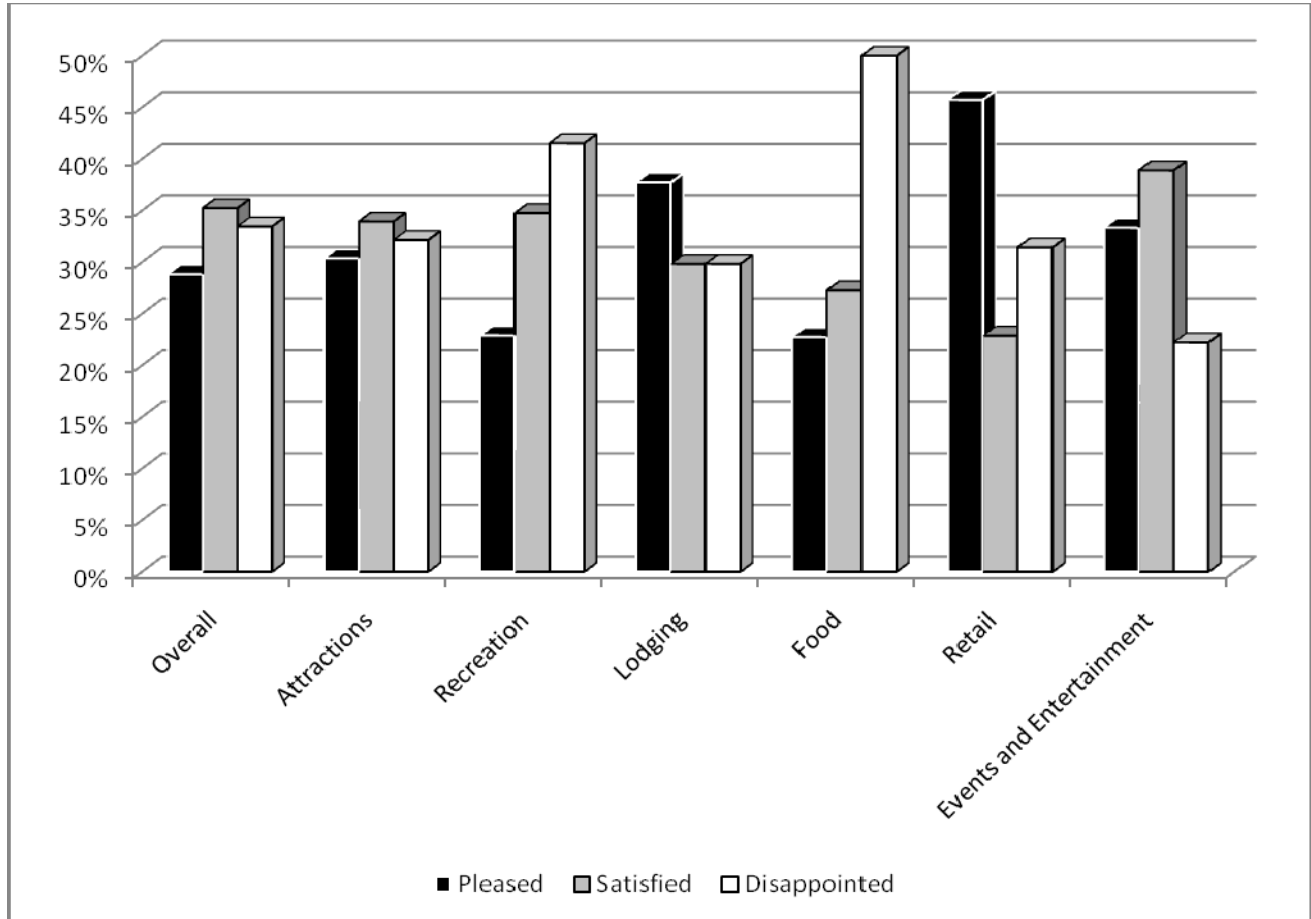


Total of "much better" and "somewhat better" answers:

08	07	06	05	04	02	01	00	99
29%	55%	32%	44%	38%	43%	57%	45%	70%

1000 Islands Tourism Business Confidence Survey - Summer 2008

The survey showed some difference in business based on the type of operation. Overall, more lodging establishments and retailers reported having better business than restaurants, recreation-based business or attractions.

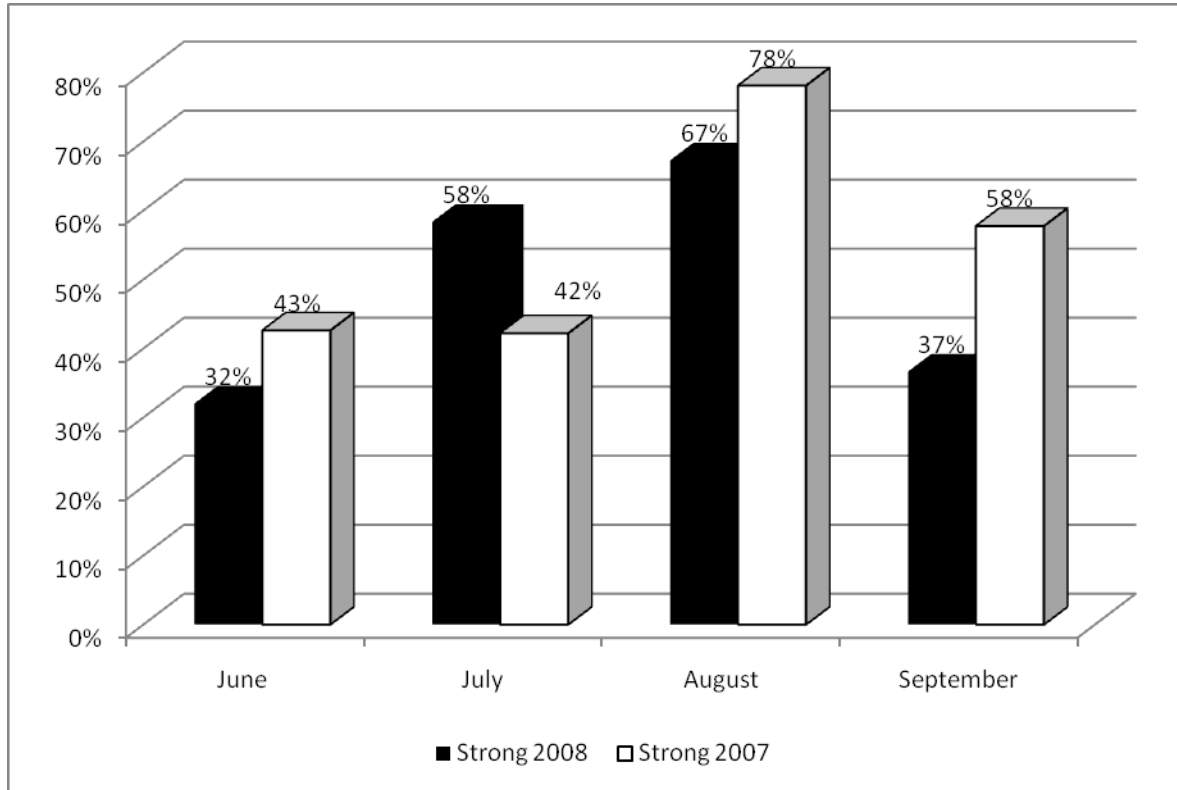


Compared to last year, how would you describe your own business for this year's summer season:

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Much Better	8%	7%	9%	9%	5%	11%	7%	11%	11%
Somewhat Better	21%	26%	23%	21%	18%	27%	16%	34%	22%
About the Same	35%	38%	30%	34%	35%	30%	27%	23%	39%
Somewhat Worse	28%	26%	31%	30%	36%	25%	41%	31%	11%
Much Worse	5%	2%	7%	2%	5%	4%	9%	0%	11%

Summer Months

The survey asked about the variances in business from month to month. As usual, business got stronger as the summer progressed. Like 2007, September got more strong ratings than June. As compared to 2007, few respondents saw June and August as strong, while more felt that July was a strong month.

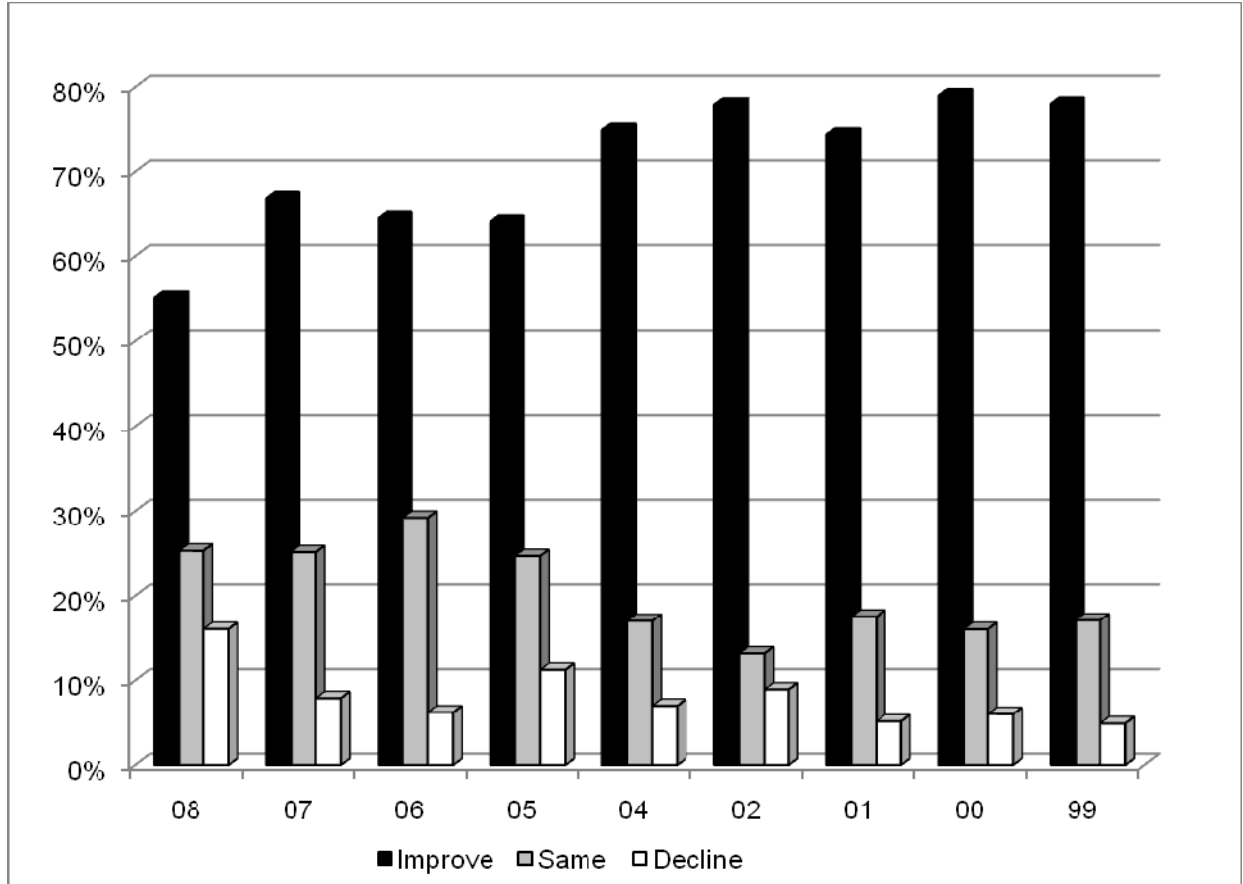


What best describes your business in each summer month this year?

	May	June	July	August	September
Very Strong	6%	11%	25%	34%	15%
Fairly Strong	16%	21%	33%	33%	22%
Moderate	31%	35%	24%	20%	31%
Somewhat Weak	26%	19%	11%	7%	18%
Very Weak	15%	11%	5%	2%	9%

The Past & Future

Most businesses continue to see a long-term, continuing improvement in their own business. However, this survey reported fewer businesses seeing improvements and more seeing either a status quo or a decline in business. The general level of confidence in the future is at the lowest point in the history of the survey.



Thinking about the next five years, do you believe your own business will:

	08	07	06	05	04	02	01	00	99
Improve Significantly	12%	26%	19%	18%	25%	22%	31%	27%	35%
Improve Slightly	43%	41%	46%	46%	50%	56%	44%	52%	43%
Be About the Same	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	14%	7%	6%	11%	6%	7%	3%	4%	4%
Decline Significantly	2%	1%	0%	0%	1%	2%	2%	2%	1%

Positive and Negative Effect of Various Factors

Weather

Half of those surveyed said that the weather was a negative factor in 2008. Wet weekends during the summer seem to have put a damper on business.

US/Canada Dollar Exchange Rate

The perception of the impact of exchange rates shows a mirrored opinion between American and Canadian responses, with about 43% of Canadians judging as a negative and 44% of Americans judging it as a positive.

	Overall	Canada	USA
Very Positive	4%	2%	8%
Positive	21%	11%	36%
No Effect	43%	43%	43%
Negative	22%	30%	9%
Very Negative	6%	13%	1%

Border Security

The number of respondents seeing border security as a negative has declined from 55% in 2006, to 49% in 2007, to 39% in 2008. However, the overall numbers are skewed by the fact that near-border communities are much more sensitive to this issue than those a bit further away. For instance, only 8% of Watertown respondents ranked the issue as a negative, while 61% of Brockville respondents ranked it as a negative.

Gas Prices

The record-high gas prices of summer 2008 were seen as a negative by 72% of those surveyed. Only 10% saw the prices as a positive. It appears that most businesses did not feel that the region benefited from tourists looking for a closer-to-home driving destination.

Water Levels

The 2008 responses show that water levels were a more positive factor overall than in recent years.

General Economic Conditions

This question has gotten fairly similar responses in the years it has been asked. More operators feel the economy is a negative factor than those citing it as a positive factor. Even given that tradition of judging the economy negatively, 2008 had the most negative response of the years the questions was asked.

1000 Islands Tourism Business Confidence Survey - Summer 2008

Summer Tourism Business Confidence Survey: Trends 1999 - 2008

Result tables in percentages

percentages have been rounded to whole numbers - totals may not add to 100% due to rounding or "no answer" responses

Business satisfaction and perception questions

Considering your own business, how would you rate your feelings about this year's summer season ?

	08	07	06	05	04	02	01	00	99
Very Pleased	14%	26%	13%	21%	13%	23%	28%	22%	33%
Pleased	23%	30%	29%	34%	28%	27%	31%	23%	43%
Satisfied	34%	25%	27%	26%	29%	31%	26%	31%	13%
Disappointed	24%	17%	26%	17%	28%	17%	12%	25%	10%
Very Disappointed	4%	2%	6%	2%	2%	1%	1%	0%	2%

Compared to last year, how would you describe your own business for this year's summer season:

	08	07	06	05	04	02	01	00	99
Much Better	8%	15%	5%	14%	11%	6%	15%	13%	25%
Somewhat Better	21%	40%	28%	31%	27%	37%	42%	32%	44%
About the Same	35%	28%	35%	36%	35%	30%	26%	22%	23%
Somewhat Worse	28%	15%	25%	18%	22%	19%	15%	31%	5%
Much Worse	5%	2%	8%	2%	4%	3%	3%	2%	2%

Compared to last year, how would you describe overall 1000 Islands tourism for this year's summer season:

	08	07	06	05	04	02	01	00	99
Much Better	1%	8%	0%	3%	5%	6%	4%	5%	20%
Somewhat Better	11%	26%	12%	27%	19%	24%	33%	16%	49%
About the Same	42%	44%	44%	48%	42%	40%	38%	37%	23%
Somewhat Worse	35%	20%	40%	20%	30%	26%	15%	41%	7%
Much Worse	5%	3%	5%	2%	4%	4%	3%	1%	1%

Business confidence questions

Thinking about the next five years, do you believe overall tourism business in the 1000 Islands will:

	08	07	06	05	04	02	01	00	99
Improve Significantly	4%	16%	10%	14%	21%	16%	20%	18%	30%
Improve Slightly	33%	42%	44%	38%	45%	57%	46%	52%	38%
Be About the Same	32%	27%	28%	30%	24%	20%	22%	19%	17%
Decline Slightly	21%	15%	15%	18%	5%	5%	7%	9%	10%
Decline Significantly	4%	1%	2%	0%	1%	2%	1%	2%	5%

Thinking about the next five years, do you believe your own business will:

	08	07	06	05	04	02	01	00	99
Improve Significantly	12%	26%	19%	18%	25%	22%	31%	27%	35%
Improve Slightly	43%	41%	46%	46%	50%	56%	44%	52%	43%
Be About the Same	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	14%	7%	6%	11%	6%	7%	3%	4%	4%
Decline Significantly	2%	1%	0%	0%	1%	2%	2%	2%	1%

Summer Tourism Business Confidence Survey: Trends 1999 - 2008

Result tables in percentages

percentages have been rounded to whole numbers - totals may not add to 100% due to rounding or "no answer" responses

Monthly trend questions:

What best describes your business in each summer month this year? (MAY)

	08
Very Strong	6%
Fairly Strong	16%
Moderate	31%
Somewhat Weak	26%
Very Weak	15%

What best describes your business in each summer month this year? (JUNE)

	08	07	06	05	04	02	01	00	99
Very Strong	11%	12%	8%	8%	7%	7%	12%	8%	
Fairly Strong	21%	30%	15%	26%	18%	19%	23%	24%	
Moderate	35%	32%	35%	37%	36%	28%	35%	33%	
Somewhat Weak	19%	17%	29%	22%	26%	32%	20%	24%	
Very Weak	11%	8%	14%	7%	12%	14%	9%	12%	

What best describes your business in each summer month this year? (JULY)

	08	07	06	05	04	02	01	00	99
Very Strong	25%	13%	24%	34%	19%	28%	35%	25%	
Fairly Strong	33%	30%	30%	33%	36%	34%	29%	33%	
Moderate	24%	32%	25%	23%	27%	24%	20%	19%	
Somewhat Weak	11%	18%	16%	8%	12%	11%	12%	20%	
Very Weak	5%	9%	5%	2%	5%	3%	3%	3%	

What best describes your business in each summer month this year? (AUGUST)

	08	07	06	05	04	02	01	00	99
Very Strong	34%	46%	29%	34%	25%	37%	36%	33%	
Fairly Strong	33%	32%	32%	37%	38%	37%	34%	36%	
Moderate	20%	14%	25%	18%	24%	20%	25%	19%	
Somewhat Weak	7%	7%	12%	10%	9%	4%	4%	8%	
Very Weak	2%	8%	2%	2%	3%	2%	1%	4%	

What best describes your business in each summer month this year? (SEPTEMBER)

	08	07	06	05	04	02	01	00	99
Very Strong	15%	21%							
Fairly Strong	22%	29%							
Moderate	31%	26%							
Somewhat Weak	18%	14%							
Very Weak	9%	9%							

1000 Islands Tourism Business Confidence Survey - Summer 2008

Summer Tourism Business Confidence Survey: Trends 1999 - 2008

Result tables in percentages

percentages have been rounded to whole numbers - totals may not add to 100% due to rounding or "no answer" responses

What kind of effect have the following factors had on your business this year?

Summer weather

	08	07	06	05	04	02	01	00	99
Very Positive	8%	36%	9%	51%	11%	42%	42%	2%	31%
Positive	21%	42%	33%	29%	14%	36%	35%	14%	45%
No Effect	17%	12%	22%	11%	20%	10%	7%	17%	15%
Negative	38%	8%	29%	8%	39%	10%	14%	45%	9%
Very Negative	12%	1%	7%	1%	12%	1%	0%	22%	0%

Canadian/US dollar exchange rate

	08	07	06	05	04	02	01	00	99
Very Positive	4%	9%	7%	3%	3%	6%	14%	7%	14%
Positive	21%	22%	21%	20%	14%	28%	16%	28%	15%
No Effect	43%	36%	38%	50%	52%	35%	39%	29%	23%
Negative	22%	22%	26%	25%	27%	21%	19%	23%	25%
Very Negative	6%	10%	6%	1%	0%	10%	11%	13%	22%

Border Security

	08	07	06	05	04	02	01	00	99
Very Positive	2%	1%	3%	2%	3%				
Positive	9%	10%	8%	6%	3%				
No Effect	44%	38%	33%	41%	41%				
Negative	29%	36%	42%	34%	37%				
Very Negative	10%	13%	13%	16%	10%				

Gas prices

	08	07	06	05	04	02	01	00	99
Very Positive	5%	2%	6%	3%	3%		3%		
Positive	5%	8%	6%	7%	8%		7%		
No Effect	11%	29%	15%	20%	23%		47%		
Negative	44%	46%	45%	48%	47%		36%		
Very Negative	28%	15%	24%	20%	15%		7%		

General Economy

	08	07	06	05	04	02	01	00	99
Very Positive	5%	2%			4%	3%	1%		
Positive	7%	24%			14%	21%	17%		
No Effect	21%	35%			24%	29%	34%		
Negative	51%	35%			47%	41%	41%		
Very Negative	10%	4%			6%	6%	5%		

Lake/River Water Levels

	08	07	06	05	04	02	01	00	99
Very Positive	5%	2%	2%	1%					
Positive	21%	8%	6%	13%					
No Effect	56%	48%	68%	58%					
Negative	9%	29%	20%	16%					
Very Negative	4%	10%	3%	7%					

Summer Tourism Business Confidence Survey: Summaries - By Country & Business Categories
Result tables in percentages

percentages have been rounded to whole numbers - totals may not add to 100% due to rounding or "no answer" responses

Business satisfaction and perception questions

Considering your own business, how would you rate your feelings about this year's summer season ?

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Pleased	14%	15%	17%	11%	9%	21%	7%	9%	17%
Pleased	23%	21%	27%	27%	26%	22%	27%	34%	33%
Satisfied	34%	37%	29%	41%	29%	33%	30%	37%	22%
Disappointed	24%	26%	22%	20%	33%	19%	25%	20%	17%
Very Disappointed	4%	1%	6%	2%	2%	4%	11%	0%	11%

Compared to last year, how would you describe your own business for this year's summer season:

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Much Better	8%	7%	9%	9%	5%	11%	7%	11%	11%
Somewhat Better	21%	26%	23%	21%	18%	27%	16%	34%	22%
About the Same	35%	38%	30%	34%	35%	30%	27%	23%	39%
Somewhat Worse	28%	26%	31%	30%	36%	25%	41%	31%	11%
Much Worse	5%	2%	7%	2%	5%	4%	9%	0%	11%

Compared to last year, how would you describe overall 1000 Islands tourism for this year's summer season:

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Much Better	1%	2%	1%	4%	1%	1%	2%	0%	6%
Somewhat Better	11%	8%	14%	9%	10%	11%	16%	11%	17%
About the Same	42%	46%	41%	54%	41%	40%	25%	46%	44%
Somewhat Worse	35%	37%	31%	25%	39%	33%	45%	34%	17%
Much Worse	5%	3%	8%	4%	5%	6%	11%	3%	6%

Business confidence questions

Thinking about the next five years, do you believe overall tourism business in the 1000 Islands will:

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Improve Significantly	4%	3%	5%	9%	1%	5%	7%	3%	11%
Improve Slightly	33%	31%	38%	34%	31%	30%	30%	40%	17%
Be About the Same	32%	41%	24%	32%	35%	33%	27%	34%	33%
Decline Slightly	21%	15%	27%	18%	25%	23%	20%	17%	28%
Decline Significantly	4%	2%	5%	2%	4%	3%	7%	3%	6%

Thinking about the next five years, do you believe your own business will:

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Improve Significantly	12%	9%	17%	20%	5%	11%	16%	20%	22%
Improve Slightly	43%	54%	35%	43%	47%	48%	41%	46%	33%
Be About the Same	25%	30%	24%	25%	29%	25%	18%	20%	17%
Decline Slightly	14%	6%	17%	11%	15%	13%	18%	11%	28%
Decline Significantly	2%	0%	5%	0%	3%	2%	2%	0%	0%

Monthly trend questions:

What best describes your business in each summer month this year? (MAY)

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Strong	6%	9%	4%	7%	8%	9%	14%	14%	6%
Fairly Strong	16%	17%	17%	9%	15%	21%	16%	11%	22%
Moderate	31%	36%	29%	39%	25%	28%	27%	43%	33%
Somewhat Weak	26%	25%	26%	23%	36%	20%	20%	17%	22%
Very Weak	15%	9%	19%	11%	14%	20%	20%	11%	0%

What best describes your business in each summer month this year? (JUNE)

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Strong	11%	14%	9%	13%	11%	12%	20%	20%	28%
Fairly Strong	21%	19%	24%	18%	19%	27%	11%	29%	11%
Moderate	35%	42%	29%	38%	35%	29%	30%	31%	44%
Somewhat Weak	19%	15%	24%	21%	26%	14%	25%	14%	17%
Very Weak	11%	7%	14%	5%	8%	15%	14%	3%	0%

What best describes your business in each summer month this year? (JULY)

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Strong	25%	26%	30%	32%	18%	29%	25%	26%	44%
Fairly Strong	33%	41%	31%	30%	37%	37%	27%	49%	39%
Moderate	24%	18%	22%	25%	27%	20%	23%	20%	11%
Somewhat Weak	11%	10%	11%	7%	14%	10%	18%	6%	0%
Very Weak	5%	4%	6%	2%	3%	4%	7%	0%	6%

What best describes your business in each summer month this year? (AUGUST)

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Strong	34%	37%	36%	36%	25%	44%	39%	49%	56%
Fairly Strong	33%	36%	36%	36%	35%	34%	23%	26%	33%
Moderate	20%	17%	18%	16%	25%	16%	23%	17%	0%
Somewhat Weak	7%	7%	7%	5%	12%	4%	9%	9%	6%
Very Weak	2%	2%	3%	2%	2%	0%	5%	0%	6%

What best describes your business in each summer month this year? (SEPTEMBER)

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Strong	15%	20%	13%	9%	8%	22%	11%	3%	28%
Fairly Strong	22%	26%	21%	30%	19%	28%	32%	29%	39%
Moderate	31%	32%	30%	20%	38%	25%	39%	43%	0%
Somewhat Weak	18%	17%	18%	20%	22%	15%	7%	17%	11%
Very Weak	9%	2%	15%	13%	12%	8%	9%	9%	11%

What kind of effect have the following factors had on your business this year?

Summer Weather

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	8%	4%	10%	11%	9%	6%	7%	3%	11%
Positive	21%	14%	26%	20%	18%	16%	11%	17%	33%
No Effect	17%	16%	21%	14%	14%	22%	9%	11%	11%
Negative	38%	45%	36%	41%	38%	42%	50%	51%	28%
Very Negative	12%	19%	5%	11%	19%	12%	20%	17%	17%

Canadian/US Dollar Exchange Rate

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	4%	2%	8%	2%	5%	3%	5%	9%	0%
Positive	21%	11%	36%	21%	17%	18%	16%	23%	33%
No Effect	43%	43%	43%	45%	47%	46%	32%	40%	22%
Negative	22%	30%	9%	23%	23%	23%	34%	23%	39%
Very Negative	6%	13%	1%	4%	7%	9%	11%	3%	0%

Border Security

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	2%	0%	3%	2%	2%	2%	2%	0%	0%
Positive	9%	7%	10%	4%	7%	10%	5%	6%	11%
No Effect	44%	43%	49%	39%	49%	39%	39%	49%	33%
Negative	29%	31%	27%	34%	27%	27%	34%	23%	39%
Very Negative	10%	14%	6%	14%	12%	18%	20%	23%	11%

Gas Prices

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	5%	2%	6%	2%	4%	3%	5%	0%	6%
Positive	5%	4%	6%	7%	6%	3%	5%	3%	11%
No Effect	11%	14%	10%	14%	7%	14%	7%	9%	0%
Negative	44%	45%	49%	48%	44%	44%	36%	43%	56%
Very Negative	28%	28%	28%	27%	35%	32%	45%	37%	28%

General Economy

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	5%	2%	6%	4%	5%	2%	5%	6%	11%
Positive	7%	7%	9%	13%	5%	6%	7%	9%	11%
No Effect	21%	27%	13%	20%	18%	27%	16%	20%	22%
Negative	51%	53%	53%	48%	54%	47%	43%	49%	39%
Very Negative	10%	4%	14%	11%	13%	13%	27%	11%	17%

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Lake/River Water Levels

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	5%	2%	6%	4%	8%	3%	0%	3%	0%
Positive	21%	10%	31%	11%	28%	16%	16%	26%	17%
No Effect	56%	66%	48%	70%	47%	62%	64%	49%	50%
Negative	9%	11%	9%	11%	11%	9%	16%	17%	22%
Very Negative	4%	6%	4%	2%	5%	7%	2%	6%	0%

Condition of Local Community

	Overall	Canada	USA	Attractions	Recreation	Lodging	Food	Retail	Events and Entertainment
Very Positive	6%	2%	12%	4%	4%	8%	2%	6%	0%
Positive	27%	24%	30%	29%	22%	27%	27%	23%	33%
No Effect	40%	50%	31%	45%	45%	38%	32%	34%	44%
Negative	19%	20%	21%	16%	24%	19%	30%	23%	17%
Very Negative	3%	2%	1%	4%	3%	4%	7%	11%	0%

Summer Tourism Business Confidence Survey: Community Cross-Tabulation (General Areas)

Result tables in percentages

percentages have been rounded to whole numbers - totals may not add to 100% due to rounding or "no answer" responses

Business satisfaction and perception questions

Considering your own business, how would you rate your feelings about this year's summer season ?

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Pleased	20%	8%	13%	12%	46%	9%	21%	13%	13%
Pleased	15%	25%	40%	20%	23%	30%	14%	19%	23%
Satisfied	20%	33%	20%	40%	31%	30%	48%	34%	37%
Disappointed	35%	8%	27%	24%	0%	30%	14%	31%	27%
Very Disappointed	10%	25%	0%	4%	0%	0%	0%	3%	0%

Compared to last year, how would you describe your own business for this year's summer season:

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Much Better	10%	8%	7%	0%	15%	13%	3%	6%	7%
Somewhat Better	15%	25%	27%	20%	31%	30%	34%	19%	27%
About the Same	15%	17%	30%	44%	38%	35%	52%	28%	33%
Somewhat Worse	40%	25%	37%	32%	15%	17%	10%	41%	33%
Much Worse	20%	17%	0%	4%	0%	4%	0%	3%	0%

Compared to last year, how would you describe overall 1000 Islands tourism for this year's summer season:

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Much Better	0%	8%	0%	0%	0%	0%	3%	0%	7%
Somewhat Better	5%	8%	23%	8%	15%	13%	10%	9%	0%
About the Same	20%	25%	40%	52%	77%	52%	62%	22%	47%
Somewhat Worse	45%	25%	37%	32%	0%	26%	17%	63%	43%
Much Worse	20%	25%	0%	4%	0%	4%	3%	6%	0%

Business confidence questions

Thinking about the next five years, do you believe overall tourism business in the 1000 Islands will:

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Improve Significantly	10%	8%	0%	0%	8%	4%	3%	6%	0%
Improve Slightly	35%	25%	47%	40%	31%	26%	31%	25%	43%
Be About the Same	15%	0%	30%	28%	31%	52%	41%	41%	27%
Decline Slightly	35%	42%	20%	24%	31%	9%	14%	22%	17%
Decline Significantly	5%	17%	3%	4%	0%	4%	0%	3%	3%

Thinking about the next five years, do you believe your own business will:

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Improve Significantly	20%	17%	13%	4%	31%	4%	10%	9%	13%
Improve Slightly	35%	25%	40%	44%	31%	57%	52%	66%	43%
Be About the Same	25%	17%	27%	24%	15%	39%	28%	16%	37%
Decline Slightly	15%	25%	17%	16%	23%	0%	7%	9%	3%
Decline Significantly	5%	8%	3%	8%	0%	0%	0%	0%	0%

1000 Islands Tourism Business Confidence Survey - Summer 2008

Monthly trend questions:

What best describes your business in each summer month this year? (MAY)

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Strong	0%	0%	7%	4%	8%	13%	7%	6%	10%
Fairly Strong	10%	8%	13%	24%	23%	13%	17%	13%	30%
Moderate	30%	17%	27%	20%	54%	30%	41%	44%	30%
Somewhat Weak	45%	17%	23%	28%	15%	39%	17%	22%	23%
Very Weak	15%	42%	20%	20%	0%	0%	10%	16%	7%

What best describes your business in each summer month this year? (JUNE)

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Strong	5%	0%	10%	4%	15%	9%	28%	6%	10%
Fairly Strong	15%	17%	23%	20%	46%	22%	14%	25%	20%
Moderate	35%	33%	30%	36%	8%	48%	41%	31%	53%
Somewhat Weak	35%	17%	17%	24%	31%	9%	10%	28%	10%
Very Weak	10%	33%	17%	16%	0%	9%	3%	9%	7%

What best describes your business in each summer month this year? (JULY)

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Strong	35%	33%	23%	24%	38%	35%	24%	19%	23%
Fairly Strong	20%	17%	33%	44%	31%	43%	45%	41%	47%
Moderate	15%	25%	33%	20%	15%	13%	21%	19%	17%
Somewhat Weak	10%	8%	10%	12%	15%	4%	7%	22%	7%
Very Weak	20%	17%	0%	0%	0%	4%	3%	0%	7%

What best describes your business in each summer month this year? (AUGUST)

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Strong	40%	25%	33%	32%	54%	52%	28%	31%	40%
Fairly Strong	25%	33%	43%	44%	23%	26%	52%	38%	27%
Moderate	20%	17%	17%	16%	23%	4%	21%	19%	20%
Somewhat Weak	5%	17%	7%	8%	0%	4%	0%	13%	10%
Very Weak	10%	8%	0%	0%	0%	4%	0%	0%	3%

What best describes your business in each summer month this year? (SEPTEMBER)

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Strong	5%	0%	7%	16%	46%	9%	14%	16%	37%
Fairly Strong	30%	8%	17%	24%	23%	30%	38%	19%	20%
Moderate	25%	33%	43%	24%	8%	26%	45%	47%	13%
Somewhat Weak	30%	25%	20%	8%	8%	30%	3%	16%	23%
Very Weak	10%	33%	10%	20%	15%	4%	0%	3%	0%

What kind of effect have the following factors had on your business this year?

Summer Weather

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	0%	17%	13%	12%	15%	4%	7%	3%	0%
Positive	25%	25%	37%	16%	15%	9%	17%	9%	23%
No Effect	20%	33%	7%	20%	46%	22%	14%	13%	10%
Negative	45%	17%	40%	48%	15%	39%	48%	44%	50%
Very Negative	10%	0%	3%	0%	8%	22%	10%	31%	17%

Canadian/US Dollar Exchange Rate

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	15%	8%	10%	0%	8%	0%	3%	3%	0%
Positive	35%	25%	37%	32%	62%	13%	17%	3%	13%
No Effect	40%	67%	40%	44%	31%	52%	45%	31%	40%
Negative	10%	0%	10%	12%	0%	22%	21%	41%	37%
Very Negative	0%	0%	3%	0%	0%	9%	10%	22%	10%

Border Security

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	0%	8%	3%	0%	8%	0%	0%	0%	0%
Positive	5%	0%	13%	8%	23%	13%	7%	9%	0%
No Effect	45%	33%	37%	60%	62%	22%	55%	25%	63%
Negative	35%	33%	37%	16%	8%	39%	24%	38%	30%
Very Negative	10%	17%	7%	0%	0%	22%	10%	19%	7%

Gas Prices

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	0%	0%	3%	16%	8%	4%	0%	3%	0%
Positive	0%	0%	10%	4%	15%	4%	14%	0%	0%
No Effect	15%	8%	10%	8%	8%	9%	3%	19%	17%
Negative	40%	58%	43%	40%	62%	48%	52%	31%	53%
Very Negative	40%	33%	27%	32%	8%	30%	24%	41%	20%

General Economy

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	0%	0%	3%	16%	0%	4%	0%	3%	0%
Positive	0%	8%	20%	0%	8%	9%	10%	0%	7%
No Effect	15%	8%	13%	4%	38%	13%	24%	28%	33%
Negative	55%	42%	40%	76%	46%	61%	48%	53%	57%
Very Negative	20%	33%	20%	0%	8%	0%	7%	9%	0%

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Lake/River Water Levels

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	5%	17%	3%	8%	0%	0%	0%	3%	7%
Positive	30%	17%	50%	28%	8%	9%	7%	13%	10%
No Effect	40%	58%	40%	40%	77%	61%	66%	66%	73%
Negative	20%	8%	7%	4%	8%	17%	10%	13%	7%
Very Negative	5%	0%	0%	8%	8%	9%	7%	3%	0%

Condition of Local Community

	Alexandria Bay	Cape Vincent	Clayton	Lakeshore	Watertown	Brockville	Cornwall	Gananoque	Kingston
Very Positive	0%	8%	20%	16%	8%	9%	0%	0%	3%
Positive	20%	33%	43%	16%	38%	17%	31%	25%	23%
No Effect	25%	42%	30%	36%	31%	48%	45%	41%	60%
Negative	45%	17%	3%	24%	23%	17%	21%	31%	13%
Very Negative	5%	0%	0%	0%	0%	4%	0%	3%	0%

Comments:

Because of increased gas prices our campground filled up w/seasonals.

Best year yet.

Border & Passport issues very negative.

Business in the next five years will improve slightly especially in Clayton. Many hassles in crossing the border negative for tourism.

Farm Tours Up 80%, B & B down 30%, Retail-Greenhouse & Market Garden Down 40%, Retail Other UP - 10%. We had people visit our farm from China, Taiwan, France, Netherlands, England, USA and all parts of Canada. Many of these people would have stopped in the Thousand Islands region if it was not for our farm. There is very little for anyone to see other than the Thousand Islands.

Negative Factor: Fishing-Evasive Species

Foreign Tourists - Negative

Fort drum has had an increase on our business

Gas price negative issue

Geese, cormorants invasive species a problem.

I believe that the financial crisis in America has been going on for the past 5 years - This year it really showed up though, in many ways. Yes we saw lots of bodies around, but a decline in spending. In general, I have chosen to not continue and try and be successful in this declining business arena. Though we love and do business in "Paradise" there is and has been a shift in America concerning tourism. Thank you for all the work that the Tourism Council has done over the years keep up the good work.

I'm hoping that the 2009-10 advertising budget for the TI Council and other area Chambers of Commerce will be used in areas near the 100 Islands. ON the Canadian side, Toronto - Ottawa - Montreal. The American side; New York along the Thruway - Buffalo-Syracuse-Albany. I feel we received many more visitors from these mentioned areas and am opting for more first time visitors for years to come, gas prices being what they area . . .

Located in the country, but easy access to US border Gananoque & Brockville. We are popular with many travelers. We provide very reasonable rates and healthy and plentiful breakfasts each day-hence many repeat guests. Within an hour's radius traveling time, there is so much to offer-Upper Canada Playhouse, Fort Henry, Prescott, fairs, concerts, great restaurants, we are so fortunate to live in such a great area. Despite the wet weather and high gas prices, we continued to have a brisk and steady B & B experience this season and even now into October.

Military very positive on business.

More Local Visitors

Negative Factor: - Passport issue

Next five years by my own choice-can't get much busier. I'm getting more off season guests. People come but don't spend extra-want to picnic here instead of eating out. My personal website is very successful. Many people find it through your website. Thank You. Attention to dietary needs is becoming a niche for me-aging population.

Next five years of tourism depends on economy and gas prices.

Not being downtown with the bars and souvenir shops was a negative factor on business. People need to be educated on how to take a relaxing vacation if they are not our regulars.

Nothing for children to do at Alexandria Bay.

October Moderate, First and second weeks of October were solid. Who knows about tourism in the next five years economics factors, are significant. Early summer weather bad, later excellent. Lack of community initiatives to bring Iroquois on into the 21st century. We were pleasantly surprised at our final "seasonal" visits. We expect to match 2007. In fact, we did best in November, compared to in our existence.

Overzealous border guards "attacking" fisherman have successfully driven several customers away for good! When I phoned MP's office about this I was told there was nothing that could be done.

Rain had a very negative effect this year. I believe the border crossings are going to be a major hurdle for 2009. With passports being mandatory, the price is too expensive for an average family to invest in, thus limiting travel.

Regarding gas prices....it did not influence cars significantly but we did see a decrease in "boater's" support and traffic.

Positive Factor: Renovations and Promotion

Sorry, but with free admission and only one staff member it is impossible to track visitation to the museum. I don't think that estimating numbers would help your statistics, so I didn't fill out the survey.

The early arrival of Memorial Day seemed to impact us in a negative way. The late June business and early July were slow because families were still in school. It took a while for things to catch up.

The effect of gas prices seemed to be more positive than expected. Many of our visitors were from the region rather than far away. (As people stayed closer to home).

Too much rain! Canadian traffic down, more local/regional consumers with gas prices, overseas visitors down significantly.

Tourism improving over the next 5 years depends on government and local intervention. It has the potential to improve.

Negative Factor: US financial & political, and world Instability.

Village board could do more to support local business, put in sidewalk for our B & B, fix town up - they could care less. We are thinking of moving our COC & Village to not help small business, we have asked continually for sidewalks -but blown off - would improve our curb appeal. Village board does not care to help to improve town. Our B & B has won many awards for our gardens. We have improved our lot so the Village would have something to be proud of - they could care less. Help in getting us sidewalks for safety & curb appeal would be appreciated. We may move due to lack of support for local business.

Water levels very negative, especially in the fall.

We had a lot of rain this year - that didn't help. Also, the gas prices and food prices are a big factor for people not doing as much recreation & sports, etc.

We had less visitors traveling great distance but made an increase in visitors nearby, Ottawa, Brockville, Kingston, and Montreal. We save a great deal of Europeans, in rental motorhomes.

1000 Islands Tourism Business Confidence Survey - Summer 2008

We had very few American tourists; the majority of our guests were from Toronto, Ottawa & Montreal. We also had a dentist (fill in) for most of May which shows us as having a strong showing in that month. We had guests from Germany, Spain & Israel as well. The gas price certainly didn't bother them because it was more expensive in their countries. Gas prices were, high but in our case, I think it encouraged local guests to not travel as far from home and visit us instead of going further afield. I think all the marketing of the 1000 Islands is working especially in Ottawa, Toronto and Montreal. The border crossing and change in is needed (i.e. Passport) will initially slow business but hopefully it will become just a fact of life as it is in Europe.

We have lost 3 motels in the Bay and people are having a hard time finding places to stay. Especially on busy event weekends. The Fisherman's Wharf, Pine Tree Point and Sir Robert Peel all either closed or changed to apartments.
