1000 Islands Tourism Business Survey

2023 REPORT AND SUMMARY

1000 Islands International Tourism Council
December, 2023

Survey Overview:
The survey was sent to businesses and organizations in the 1000 Islands International Tourism Council's database of tourism attractions, lodging, recreation and other sectors located in Jefferson County, NY, and Leeds-Grenville, Ontario as well as its incorporated municipalities and those in Frontenac and Glengarry counties. Based on the answer to a survey question, the majority of those responding get more than 50 percent of their trade from tourists.

Those invited received an email invitation(s) and could complete the survey online. Survey invitations were mailed about Oct. 20 through Nov. 6 and collected until Nov. 13.

The survey contains a core set of questions that have been asked in similar surveys conducted since 1999. The results are tracked against previous years to illustrate shifts in business performance and confidence. This year, 110 surveys were returned, which continues a trend of marginal decreases in replies. The longtime viability of the survey as an effective tool should be examined before fall 2024.

Leveling of satisfaction and optimism
Feelings about the 2023 season and future outlook closely match pre-2017 feedback. From 2017 through 2022, satisfaction rates swung greatly year to year, coinciding with significant impacts on the industry including record-high water levels (2017 and 2019) and the outbreak of the Covid-19 pandemic and subsequent imposed operating restrictions and relief.

More balanced satisfaction rates among New York and Ontario
Similarly, satisfaction rates between New York and Ontario businesses ran closer than during the 2017-2022 period, with Canadian operators having a slightly more favorable review of 2023 and outlook for the years ahead.

Economy and discretionary spending
Nearly half of responders gave poor marks to the impact of general economic conditions on business. Retail sector businesses had some of the lowest satisfaction rates, potentially owing to less spending while in the destination.

Destination Development
Tourism's role in community development and the quality of residents' lives has become more widely recognized since the pandemic outbreak. This year's survey asked operators to pick the areas they most want to see investment to improve their destination. Critical infrastructure and quality-of-life improvements such as roads, bridges, benches and walkable downtowns were most popular. This type of feedback is useful when engaging policymakers.

*some chart columns equal +/-1 of 100% due to rounding to nearest whole percentage

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

	Overall	Ontario	New York
Very Pleased	19%	15%	23%
Pleased	36%	42%	36%
Satisfied	23%	19%	21%
Disappointed	17%	23%	15%
Very Disappointed	5%	0%	6%

Answer Options	Attractions	Recreation & Sports	Lodging	Food	Retail	Events/ Entertainment	Marine	Campgrounds	Agriculture/Craft Beverage	Other
Very Pleased	19%	26%	24%	17%	0%	25%	21%	40%	13%	0%
Pleased	48%	39%	36%	50%	33%	42%	36%	20%	13%	50%
Satisfied	14%	7%	27%	8%	33%	38%	14%	40%	50%	50%
Disappointed	14%	29%	6%	8%	33%	17%	29%	0%	13%	0%
Very Disappointed	5%	0%	6%	17%	0%	8%	0%	0%	13%	0%

Compared to last year, how would you describe overall 1000 Islands tourism for the summer season?

	Overall	Ontario	New York
Much Better	13%	8%	15%
Somewhat Better	27%	35%	22%
About the Same	41%	42%	44%
Somewhat Worse	16%	12%	17%
Much Worse	4%	4%	1%

*some operators did not identify their business location, so Overall percentages will occasionally not reflect average of New York and Ontario responses.

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

	Overall	Ontario	New York
Improve Significantly	16%	4%	19%
Improve Slightly	52%	77%	43%
Be About the Same	24%	12%	30%
Decline Slightly	7%	8%	7%
Decline Significantly	1%	0%	1%

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

	Overall	Ontario	New York
Improve Significantly	14%	12%	13%
Improve Slightly	53%	62%	51%
Be About the Same	24%	23%	27%
Decline Slightly	9%	4%	10%
Decline Significantly	0%	0%	0%

What is your estimate of the percentage of your business that comes from tourists?

	Overall	Ontario	New York
More than 75%	41%	58%	36%
51% to 75%	17%	15%	17%
26% to 50%	20%	8%	25%
10% to 25%	17%	19%	17%
Less than 10%	6%	0%	6%

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

Overall	Very Positive	Positive	No Effect	Negative	Very Negative
Summer weather	13%	39%	19%	27%	1%
General economic conditions	4%	24%	28%	34%	11%
Canadian/US Dollar Exchange	3%	19%	59%	14%	5%
Ease of crossing border	7%	40%	43%	8%	2%
Gas prices	3%	7%	28%	51%	11%
Water levels	6%	26%	59%	8%	1%
Marketing of the 1000 Islands	9%	62%	28%	1%	0%
Competition from other areas	2%	16%	65%	16%	1%
US/Canadian relations	5%	34%	52%	7%	2%
Opening of new attractions nearby	4%	27%	64%	4%	0%

What best describes your business in each spring through fall month this year?

Overall	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	13%	17%	34%	22%	14%
June	19%	33%	24%	16%	8%
July	46%	26%	18%	6%	5%
August	43%	31%	13%	9%	4%
September	17%	34%	26%	12%	12%
October	10%	10%	35%	21%	23%

New York	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	15%	15%	37%	21%	13%
June	23%	30%	25%	16%	7%
July	48%	25%	16%	4%	7%
August	44%	28%	11%	11%	6%
September	17%	33%	24%	16%	10%
October	9%	11%	34%	23%	22%

Ontario	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	8%	21%	33%	21%	17%
June	12%	40%	24%	20%	4%
July	43%	27%	19%	12%	0%
August	42%	35%	15%	8%	0%
September	19%	36%	28%	4%	16%
October	13%	4%	42%	17%	25%

Having visitor-friendly communities is a goal of all destinations. What areas would you most like to see improved in your community to strengthen it as a visitor destination?

	Overall	Ontario	New York
Critical infrastructure such as roads, bridges, water/sewer, sidewalks, docks and parking.	32%	28%	35%
Quality-of-life/experiential infrastructure such as benches, trails, wayfinding signs, downtown walkability, etc.	25%	28%	23%
Aesthetic projects such as gardening and ornamental lighting.	7%	0%	9%
Governmental services such as trash removal, law enforcement assistance and emergency services help at events, festivals, etc.	7%	4%	9%
Regulatory needs such as easier access to permits, modernizing codes, etc.	12%	16%	10%
None. I think my community is properly developed to be a destination.	17%	24%	15%

Which of the following best matches your 2024 marketing plans?

I will invest more resources into marketing to sustain and build demand.	21%
I will invest less into marketing because of scarcity of resources/other expenses.	8%
I will invest about the same in 2022 as I did in 2021 when it comes to marketing.	70%

Respondents: Total of 99 responses

Country	
USA	73
Canada	26

Respondents: Total of 99 responses

Type of Business:	
Attractions	21
Recreation & Sport	31
Lodging	33
Food	12
Retail	9
Events/Entertainment	12
Marine	28
Campgrounds	5
Agriculture/Craft Beverage	8
Other	2

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Pleased	19%	28%	29%	22%	14%	32%	15%	27%	23%	15%	16%	19%	19%	19%	15%	14%	26%	13%	21%	13%	23%	28%	22%	33%
Pleased	36%	40%	34%	12%	30%	41%	27%	41%	35%	25%	28%	31%	29%	36%	22%	23%	30%	29%	34%	28%	27%	31%	23%	43%
Satisfied	23%	22%	19%	20%	29%	18%	24%	20%	26%	37%	29%	30%	32%	31%	33%	34%	25%	27%	26%	29%	31%	26%	31%	13%
Disappointed	17%	7%	13%	22%	20%	7%	23%	9%	14%	22%	22%	20%	17%	13%	22%	24%	17%	26%	17%	28%	17%	12%	25%	10%
Very Disappointed	5%	2%	5%	24%	8%	1%	10%	3%	1%	2%	6%	1%	3%	2%	7%	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:

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Much Better	12%	26%	31%	17%	6%	23%	12%	17%	15%	10%	8%	12%	7%	13%	9%	8%	15%	5%	14%	11%	6%	15%	13%	25%
Somewhat Better	29%	31%	35%	16%	29%	43%	20%	45%	39%	26%	27%	34%	30%	35%	23%	21%	40%	28%	31%	27%	37%	42%	32%	44%
About the Same	34%	33%	24%	10%	31%	23%	27%	26%	26%	34%	33%	31%	35%	30%	34%	35%	28%	35%	36%	35%	30%	26%	22%	23%
Somewhat Worse	19%	9%	6%	19%	26%	11%	28%	10%	18%	26%	25%	21%	24%	20%	26%	28%	15%	25%	18%	22%	19%	15%	31%	5%
Much Worse	6%	1%	4%	38%	8%	1%	14%	2%	1%	4%	7%	2%	4%	2%	8%	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:

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Much Better	13%	25%	29%	11%	2%	20%	4%	16%	8%	6%	5%	7%	5%	11%	2%	1%	8%	0%	3%	5%	6%	4%	5%	20%
Somewhat Better	27%	41%	39%	15%	21%	43%	14%	47%	38%	23%	18%	31%	18%	34%	8%	11%	26%	12%	27%	19%	24%	33%	16%	49%
About the Same	41%	24%	25%	10%	49%	30%	32%	28%	38%	41%	45%	44%	49%	38%	48%	42%	44%	44%	48%	42%	40%	38%	37%	23%
Somewhat Worse	16%	10%	5%	29%	23%	6%	41%	9%	16%	26%	27%	16%	26%	15%	37%	35%	20%	40%	20%	30%	26%	15%	41%	7%
Much Worse	3%	1%	2%	36%	6%	1%	9%	1%	2%	4%	4%	1%	2%	2%	6%	5%	3%	5%	2%	4%	4%	3%	1%	1%

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Improve Significantly	14%	21%	34%	33%	14%	19%	21%	21%	15%	12%	16%	10%	12%	14%	11%	4%	16%	10%	14%	21%	16%	20%	18%	30%
Improve Slightly	53%	50%	54%	48%	45%	58%	45%	40%	47%	47%	43%	55%	41%	56%	48%	33%	42%	44%	38%	45%	57%	46%	52%	38%
Be About the Same	24%	24%	10%	11%	36%	20%	29%	35%	30%	29%	29%	27%	36%	22%	29%	32%	27%	28%	30%	24%	20%	22%	19%	17%
Decline Slightly	9%	3%	2%	4%	5%	3%	5%	4%	8%	10%	11%	7%	10%	9%	10%	21%	15%	15%	18%	5%	5%	7%	9%	10%
Decline Significantly	0%	1%	0%	5%	2%	1%	1%	1%	1%	1%	2%	1%	2%	0%	2%	4%	1%	2%	0%	1%	2%	1%	2%	5%

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Improve Significantly	16%	25%	30%	28%	15%	22%	19%	20%	19%	20%	15%	14%	16%	16%	19%	12%	26%	19%	18%	25%	22%	31%	27%	35%
Improve Slightly	52%	49%	52%	44%	53%	50%	53%	47%	47%	49%	53%	53%	42%	54%	51%	43%	41%	46%	46%	50%	56%	44%	52%	43%
Be About the Same	24%	24%	15%	19%	26%	25%	21%	25%	26%	24%	24%	26%	35%	22%	21%	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	8%	2%	2%	5%	6%	2%	6%	4%	8%	6%	6%	6%	5%	7%	6%	14%	7%	6%	11%	6%	7%	3%	4%	4%
Decline Significantly	1%	1%	1%	4%	0%	2%	1%	5%	1%	1%	2%	1%	2%	1%	2%	2%	1%	0%	0%	1%	2%	2%	2%	1%

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Strong	19%	19%	17%	9%	9%	15%	7%	12%	7%	4%	6%	12%	6%	12%	10%	11%	12%	8%	8%	7%	7%	12%	8%
Fairly Strong	33%	34%	34%	17%	20%	42%	19%	34%	25%	25%	18%	30%	20%	21%	24%	21%	30%	15%	26%	18%	19%	23%	24%
Moderate	24%	34%	28%	13%	31%	24%	27%	32%	42%	36%	34%	32%	41%	36%	25%	35%	32%	35%	37%	36%	28%	35%	33%
Somewhat Weak	16%	10%	10%	15%	23%	14%	23%	20%	20%	26%	31%	18%	25%	22%	29%	19%	17%	29%	22%	26%	32%	20%	24%
Very Weak	8%	3%	12%	47%	18%	5%	21%	2%	6%	10%	12%	9%	8%	10%	13%	11%	8%	14%	7%	12%	14%	9%	12%

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Strong	46%	52%	52%	28%	29%	55%	28%	46%	39%	32%	27%	29%	28%	32%	28%	25%	13%	24%	34%	19%	28%	35%	25%
Fairly Strong	26%	30%	25%	15%	35%	27%	30%	35%	38%	34%	33%	36%	35%	33%	23%	33%	30%	30%	33%	36%	34%	29%	33%
Moderate	18%	14%	13%	20%	20%	13%	16%	15%	16%	19%	24%	22%	25%	24%	27%	24%	32%	25%	23%	27%	24%	20%	19%
Somewhat Weak	6%	3%	8%	13%	11%	2%	14%	2%	6%	12%	11%	11%	9%	8%	15%	11%	18%	16%	8%	12%	11%	12%	20%
Very Weak	5%	2%	2%	24%	5%	2%	8%	1%	1%	2%	5%	1%	3%	3%	6%	5%	9%	5%	2%	5%	3%	3%	3%

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

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Strong	43%	54%	54%	33%	35%	54%	36%	46%	39%	35%	33%	30%	30%	37%	29%	34%	46%	29%	34%	25%	37%	36%	33%
Fairly Strong	31%	27%	24%	19%	37%	30%	30%	35%	39%	36%	41%	40%	36%	36%	35%	33%	32%	32%	37%	38%	37%	34%	36%
Moderate	13%	11%	15%	18%	16%	13%	22%	10%	12%	21%	15%	18%	23%	21%	20%	20%	14%	25%	18%	24%	20%	25%	19%
Somewhat Weak	9%	6%	4%	14%	10%	2%	8%	6%	9%	8%	8%	10%	8%	4%	11%	7%	7%	12%	10%	9%	4%	4%	8%
Very Weak	4%	3%	4%	16%	2%	1%	3%	2%	1%	1%	3%	1%	4%	3%	4%	2%	8%	2%	2%	3%	2%	1%	4%

What best describes your business in <u>each summer month</u> this year? (SEPTEMBER)

	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Very Strong	17%	20%	22%	17%	15%	21%	13%	17%	13%	13%	12%	17%	9%	13%	10%
Fairly Strong	34%	37%	36%	25%	29%	39%	33%	32%	35%	26%	26%	25%	23%	25%	28%
Moderate	26%	24%	26%	19%	36%	21%	30%	30%	27%	31%	31%	34%	35%	36%	38%
Somewhat Weak	12%	12%	8%	13%	16%	15%	14%	16%	19%	21%	19%	13%	27%	16%	13%
Very Weak	12%	8%	8%	26%	5%	5%	7%	4%	6%	9%	12%	11%	7%	11%	11%

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

Summer weather

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Positive	13%	25%	18%	37%	19%	51%	8%	55%	33%	12%	14%	46%	31%	43%	9%	8%	36%	9%	51%	11%	42%	42%	2%	31%
Positive	39%	54%	56%	34%	43%	38%	23%	32%	44%	33%	29%	31%	43%	37%	17%	21%	42%	33%	29%	14%	36%	35%	14%	45%
No Effect	19%	14%	18%	28%	14%	6%	13%	7%	14%	18%	20%	13%	15%	13%	21%	17%	12%	22%	11%	20%	10%	7%	17%	15%
Negative	27%	7%	7%	1%	19%	4%	34%	2%	7%	32%	27%	8%	10%	6%	36%	38%	8%	29%	8%	39%	10%	14%	45%	9%
Very Negative	1%	0%	1%	0%	4%	1%	19%	4%	1%	5%	9%	2%	2%	1%	18%	12%	1%	7%	1%	12%	1%	0%	22%	0%

Canadian/US dollar exchange rate

	23		21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Positive	3%	3%	2%	0%	2%	4%	5%	7%	8%	1%	3%	3%	5%	3%	5%	4%	9%	7%	3%	3%	6%	14%	7%	14%
Positive	19%	11%	8%	5%	19%	24%	22%	18%	20%	21%	26%	27%	20%	21%	15%	21%	22%	21%	20%	14%	28%	16%	28%	15%
No Effect	59%	66%	78%	75%	58%	53%	50%	41%	35%	53%	53%	48%	47%	48%	51%	43%	36%	38%	50%	52%	35%	39%	29%	23%
Negative	14%	18%	8%	8%	18%	16%	19%	25%	27%	20%	17%	17%	22%	23%	24%	22%	22%	26%	25%	27%	21%	19%	23%	25%
Very Negative	5%	3%	4%	13%	4%	3%	1%	8%	10%	5%	1%	4%	5%	5%	4%	6%	10%	6%	1%	0%	10%	11%	13%	22%

Ease of crossing the border

	23		21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Positive	7%	4%	6%	3%	2%	6%	4%	2%	2%	1%	6%	2%	4%	2%	7%	2%	1%	3%	2%	3%				
Positive	40%	22%	6%	2%	20%	25%	21%	23%	23%	21%	20%	15%	15%	13%	9%	9%	10%	8%	6%	3%				
No Effect	43%	32%	27%	16%	55%	52%	52%	49%	47%	53%	42%	50%	41%	42%	33%	44%	38%	33%	41%	41%				
Negative	8%	25%	28%	14%	22%	14%	16%	22%	22%	20%	28%	28%	28%	29%	32%	29%	36%	42%	34%	37%				
Very Negative	2%	17%	33%	64%	1%	3%	2%	4%	5%	5%	5%	5%	12%	14%	18%	10%	13%	13%	16%	10%				

Gas prices

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Positive	3%	1%	5%	5%	2%	6%	5%	12%	15%	4%	6%	3%	5%	2%	9%	5%	2%	6%	3%	3%		3%	
Positive	7%	4%	10%	24%	20%	22%	25%	56%	53%	17%	11%	7%	10%	16%	12%	5%	8%	6%	7%	8%		7%	
No Effect	28%	23%	46%	68%	55%	47%	50%	25%	22%	25%	25%	15%	19%	38%	46%	11%	29%	15%	20%	23%		47%	
Negative	51%	43%	32%	2%	22%	24%	16%	6%	8%	45%	51%	58%	51%	36%	27%	44%	46%	45%	48%	47%		36%	
Very Negative	11%	31%	7%	0%	1%	2%	2%	1%	1%	8%	7%	17%	14%	8%	5%	28%	15%	24%	20%	15%		7%	

General Economy

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Positive	4%	5%	6%	7%	8%	19%	5%	9%	10%	4%	7%	2%	5%	3%	6%	5%	2%			4%	3%	1%	
Positive	24%	29%	49%	27%	39%	59%	36%	49%	40%	27%	20%	20%	14%	17%	12%	7%	24%			14%	21%	17%	
No Effect	28%	20%	21%	24%	33%	11%	39%	23%	18%	18%	19%	24%	19%	25%	23%	21%	35%			24%	29%	34%	
Negative	34%	40%	19%	30%	19%	10%	16%	15%	29%	43%	48%	46%	52%	46%	45%	51%	35%			47%	41%	41%	
Very Negative	11%	7%	5%	13%	2%	1%	2%	3%	2%	8%	6%	9%	11%	9%	14%	10%	4%			6%	6%	5%	

Lake/River Water Levels

	23	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Positive	6%	0%	4%	14%	2%	17%	2%	4%	6%	3%	7%	1%	4%	5%	4%	5%	2%	2%	1%				
Positive	26%	11%	13%	25%	6%	35%	10%	19%	29%	22%	19%	1%	14%	6%	14%	21%	8%	6%	13%				
No Effect	59%	47%	54%	54%	26%	38%	18%	52%	53%	57%	47%	35%	62%	57%	63%	56%	48%	68%	58%				
Negative	8%	29%	23%	6%	29%	9%	29%	16%	9%	14%	23%	42%	12%	22%	15%	9%	29%	20%	16%				
Very Negative	1%	13%	6%	2%	38%	1%	40%	9%	3%	4%	3%	21%	6%	11%	4%	4%	10%	3%	7%				

Competition from other areas

	23	22	21	20	19	18	17	16	15	14	13
Very Positive	2%	1%	2%	2%	1%	3%	1%	1%	3%	3%	2%
Positive	16%	11%	11%	9%	13%	18%	13%	16%	14%	14%	10%
No Effect	65%	69%	64%	76%	61%	57%	63%	61%	55%	57%	56%
Negative	16%	19%	22%	11%	24%	20%	15%	21%	26%	23%	28%
Very Negative	1%	0%	1%	2%	2%	3%	4%	2%	3%	3%	3%

Marketing of the 1000 Islands

	23	22	21	20	19	18	17	16	15	14	13
Very Positive	9%	11%	8%	10%	12%	17%	9%	14%	14%	7%	9%
Positive	62%	57%	59%	47%	57%	72%	55%	60%	57%	56%	56%
No Effect	28%	31%	30%	39%	29%	9%	29%	23%	23%	27%	25%
Negative	1%	1%	2%	4%	3%	3%	3%	2%	6%	9%	9%
Very Negative	0%	0%	1%	1%	0%	0%	1%	1%	1%	1%	1%

Covid-19

	22	21	20
Very Positive	4%	4%	19%
Positive	8%	20%	19%
No Effect	48%	16%	6%
Negative	35%	32%	16%
Very Negative	4%	28%	41%