

1000 Islands Tourism Business Survey

2020 REPORT AND SUMMARY

1000 Islands International Tourism Council
December, 2020

Survey Overview:

The survey was sent to businesses and organizations in the 1000 Islands International Tourism Council's database of local tourism organizations, attractions, lodging, and recreation businesses. Based on the answer to a survey question, the majority of those responding get more than 75 percent of their trade from tourists.

Those invited received either an e-mail invitation and postal mail invitation and could complete the survey online or by returning a paper form in a postage paid envelope. Survey invitations were mailed about October 15 and collected through November 16.

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, 154 surveys were returned, more than 25% less than in 2019.

Satisfaction with 2020 Business:

2020 produced the greatest disappointment recorded in the 22-year history. Businesses reported historic disappointment in both their own operations as well as their view of the region's performance. 2020 also set a historic record for optimism about both the regional outlook but also individual business performance in the future. While most operators underwent a historically poor year, businesses are collectively optimistic about the recovery of travel and tourism in the 1000 Islands region.

American vs. Canadian

New York operators reported more positive, and less negative, performance than their Ontario neighbors. The reopening of New York tourism business types before their Ontario counterparts can be seen in spring season feedback comparisons.

Winners and Losers

While more pronounced among New York responders, businesses had varying levels of satisfaction, with some reporting very strong seasons. Ontario was a bit more homogenized with very few reporting a successful season. Strongest performers were recreation, marine, camping and retail.

Factors Impacting Performance

While Covid-19 drew unfavorable marks, closure of the U.S.-Canadian border garnered more negative responses, demonstrating that the closure negatively impacted more businesses than Covid-19, which allowed some to prosper.

Covid-19 fallout

A majority of responders received some kind of assistance and the government response to Covid was categorized as more impactful than the virus' influence on visitor behavior. The question of whether more business was desired drew nearly an even split between those satisfied with their patronage given operating comfort levels and those who felt they could have serviced more.

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

Answer Options	Overall	Ontario	New York
Very Pleased	22%	4%	33%
Pleased	12%	2%	14%
Satisfied	20%	17%	22%
Disappointed	22%	28%	18%
Very Disappointed	24%	47%	12%

Answer Options	Attraction	Recreation & Sport	Lodging	Food	Retail	Events/ Entertainment	Marine	Camp-ground	Agriculture / Craft Beverage	Other
Very Pleased	26%	28%	21%	20%	44%	13%	33%	28%	25%	19%
Pleased	3%	17%	8%	10%	6%	7%	12%	14%	8%	19%
Satisfied	16%	21%	21%	25%	17%	7%	21%	43%	33%	31%
Disappointed	23%	17%	27%	25%	33%	27%	18%	14%	33%	25%
Very Disappointed	32%	17%	25%	20%	0%	47%	15%	0%	0%	6%

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

	Overall	Ontario	New York
Much Better	17%	0%	26%
Somewhat Better	16%	7%	20%
About the Same	10%	2%	13%
Somewhat Worse	19%	15%	21%
Much Worse	38%	76%	20%

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

	Overall	Ontario	New York
Improve Significantly	33%	27%	35%
Improve Slightly	47%	45%	47%
Be About the Same	11%	7%	13%
Decline Slightly	4%	7%	2%
Decline Significantly	5%	14%	1%

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

	Overall	Ontario	New York
Improve Significantly	28%	27%	30%
Improve Slightly	44%	44%	40%
Be About the Same	19%	16%	22%
Decline Slightly	5%	4%	6%
Decline Significantly	4%	9%	1%

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

Overall	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	4%	8%	11%	14%	64%
JUNE	9%	17%	13%	15%	47%
JULY	28%	15%	20%	13%	24%
AUGUST	33%	19%	18%	14%	16%
SEPT.	17%	25%	19%	13%	26%
OCT.	6%	18%	14%	21%	40%

New York	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	6%	10%	13%	16%	56%
JUNE	13%	20%	13%	19%	34%
JULY	38%	16%	20%	13%	12%
AUGUST	46%	18%	16%	8%	12%
SEPT.	21%	33%	17%	10%	19%
OCT.	9%	20%	17%	19%	36%

Ontario	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	2%	2%	7%	0%	88%
JUNE	2%	9%	7%	5%	77%
JULY	2%	15%	22%	13%	48%
AUGUST	4%	23%	21%	26%	26%
SEPT.	4%	11%	23%	21%	40%
OCT.	2%	11%	9%	27%	51%

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	37%	34%	28%	1%	0%
General economic conditions	7%	27%	24%	30%	13%
Canadian/US dollar exchange rate	0%	5%	75%	8%	13%
Ease of crossing the border	3%	2%	16%	14%	64%
Gas prices	2%	20%	56%	2%	0%
Water levels	14%	25%	54%	6%	2%
Marketing of the 1000 Islands	10%	47%	39%	4%	1%
Competition from other areas	2%	9%	76%	11%	2%
USA/Canada relations	3%	3%	39%	26%	29%
Opening of new attractions nearby	3%	15%	75%	5%	3%
Covid-19	13%	14%	5%	13%	55%

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

	Overall	Ontario	New York
Less than 10%	3%	2%	4%
10% to 25%	10%	9%	10%
26% to 50%	15%	17%	14%
51% to 75%	16%	17%	16%
More than 75%	55%	55%	56%

Which part of the Covid-19 outbreak had a greater impact on your business?

	Overall	Ontario	New York
Changes in traveler behavior such as decreased demand due to my business type.	38%	40%	36%
Government response measures such as border closure, capacity limits, quarantine requirements.	62%	60%	64%

Looking back at 2020, how would you rate your feelings about the season within the context of Covid-19?

	Overall	Ontario	New York
We had too many customers considering the operating and safety concerns for our business, community and patrons.	10%	14%	8%
We had the right amount of customers for how we had to operate safely for all involved.	40%	27%	46%
We could have serviced more customers and still been comfortable operationally and with regard to safety protocols.	50%	59%	46%

Did your business receive the following types of Covid-19 assistance? Check all that apply.

	Overall	Ontario	New York
Federal loans/grants	51%	68%	42%
Provincial or state loans/grants	7%	19%	0%
Local (counties level) loans/grants	6%	9%	4%
Private (for example, non-profit) loans/grants	2%	4%	1%
No assistance received	46%	24%	56%

If you received assistance, please categorize the funding type. Check all that apply.

	Overall	Ontario	New York
Grants	37%	53%	25%
Loans, including forgiveness lending	80%	68%	90%

Respondents: Total of 154 responses

Country	
USA	66%
Canada	34%

Type of Business	
Attractions	31
Recreation & Sport	29
Lodging	53
Food	20
Retail	18
Events/Entertainment	15
Marine	33
Campgrounds	7
Agricultural / Craft Beverage	12
Other	17

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

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

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

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

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Improve Significantly	33%	14%	19%	21%	21%	15%	12%	16%	10%	12%	14%	11%	4%	16%	10%	14%	21%	16%	20%	18%	30%
Improve Slightly	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	11%	36%	20%	29%	35%	30%	29%	29%	27%	36%	22%	29%	32%	27%	28%	30%	24%	20%	22%	19%	17%
Decline Slightly	4%	5%	3%	5%	4%	8%	10%	11%	7%	10%	9%	10%	21%	15%	15%	18%	5%	5%	7%	9%	10%
Decline Significantly	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:

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Improve Significantly	28%	15%	22%	19%	20%	19%	20%	15%	14%	16%	16%	19%	12%	26%	19%	18%	25%	22%	31%	27%	35%
Improve Slightly	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	19%	26%	25%	21%	25%	26%	24%	24%	26%	35%	22%	21%	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	5%	6%	2%	6%	4%	8%	6%	6%	6%	5%	7%	6%	14%	7%	6%	11%	6%	7%	3%	4%	4%
Decline Significantly	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)

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Strong	9%	9%	15%	7%	12%	7%	4%	6%	12%	6%	12%	10%	11%	12%	8%	8%	7%	7%	12%	8%	
Fairly Strong	17%	20%	42%	19%	34%	25%	25%	18%	30%	20%	21%	24%	21%	30%	15%	26%	18%	19%	23%	24%	
Moderate	13%	31%	24%	27%	32%	42%	36%	34%	32%	41%	36%	25%	35%	32%	35%	37%	36%	28%	35%	33%	
Somewhat Weak	15%	23%	14%	23%	20%	20%	26%	31%	18%	25%	22%	29%	19%	17%	29%	22%	26%	32%	20%	24%	
Very Weak	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)

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Strong	28%	29%	55%	28%	46%	39%	32%	27%	29%	28%	32%	28%	25%	13%	24%	34%	19%	28%	35%	25%	
Fairly Strong	15%	35%	27%	30%	35%	38%	34%	33%	36%	35%	33%	23%	33%	30%	30%	33%	36%	34%	29%	33%	
Moderate	20%	20%	13%	16%	15%	16%	19%	24%	22%	25%	24%	27%	24%	32%	25%	23%	27%	24%	20%	19%	
Somewhat Weak	13%	11%	2%	14%	2%	6%	12%	11%	11%	9%	8%	15%	11%	18%	16%	8%	12%	11%	12%	20%	
Very Weak	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)

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Strong	33%	35%	54%	36%	46%	39%	35%	33%	30%	30%	37%	29%	34%	46%	29%	34%	25%	37%	36%	33%	
Fairly Strong	19%	37%	30%	30%	35%	39%	36%	41%	40%	36%	36%	35%	33%	32%	32%	37%	38%	37%	34%	36%	
Moderate	18%	16%	13%	22%	10%	12%	21%	15%	18%	23%	21%	20%	20%	14%	25%	18%	24%	20%	25%	19%	
Somewhat Weak	14%	10%	2%	8%	6%	9%	8%	8%	10%	8%	4%	11%	7%	7%	12%	10%	9%	4%	4%	8%	
Very Weak	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 each summer month this year? (SEPTEMBER)

	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6
Very Strong	17%	15%	21%	13%	17%	13%	13%	12%	17%	9%	13%	10%	15%	21%	
Fairly Strong	25%	29%	39%	33%	32%	35%	26%	26%	25%	23%	25%	28%	22%	29%	
Moderate	19%	36%	21%	30%	30%	27%	31%	31%	34%	35%	36%	38%	31%	26%	
Somewhat Weak	13%	16%	15%	14%	16%	19%	21%	19%	13%	27%	16%	13%	18%	14%	
Very Weak	26%	5%	5%	7%	4%	6%	9%	12%	11%	7%	11%	11%	9%	9%	

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

Summer weather

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

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

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

Gas prices

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

General Economy

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

Lake/River Water Levels

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

Competition from other areas

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

Awareness of the 1000 Islands as a destination

	20	19	18	17	16	15	14	13
Very Positive	10%	12%	17%	9%	14%	14%	7%	9%
Positive	47%	57%	72%	55%	60%	57%	56%	56%
No Effect	39%	29%	9%	29%	23%	23%	27%	25%
Negative	4%	3%	3%	3%	2%	6%	9%	9%
Very Negative	1%	0%	0%	1%	1%	1%	1%	1%