

1000 Islands Tourism Business Survey

2022 REPORT AND SUMMARY

1000 Islands International Tourism Council
December, 2022

Survey Overview:

The survey was sent to businesses and organizations in the 1000 Islands International Tourism Council's database of local tourism attractions, lodging, recreation and other sectors. 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. 11 through Oct. 31 and collected until Nov 7.

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, 127 surveys were returned, which is similar to 2020 and less than 2021.

Satisfaction with 2022 Business and Optimism for the Future

Operators again reported high satisfaction with the regional travel economy, with 90% of those responding reporting that they are positive about 2022. Optimism remains, with almost three-quarters of operators saying they anticipate that the local tourism industry will improve.

Rebalanced satisfaction rates among New York and Ontario

Satisfaction rates among Ontario operators rebounded significantly in 2022 compared to 2020 and 2021. Two-thirds of responders reported being pleased with 2022 while another third was satisfied. Operators attributed lower rates in 2021 and 2020 to the onset of the Covid-19 pandemic and government restrictions. Satisfaction rates among New York operators "rebounded" in 2021 following low reports in 2020. New York operators remained pleased but at a slightly lower rate than in 2021.

Sector-based Success

Lodging operators provided the most favorable reviews by sector of 2022, with 80 percent reporting to be pleased with the year and none registering negative feedback. Recreation & sports remained pleased while satisfaction rates from the events/entertainment sector rebounded from 2020 and 2021 levels.

Delivering value

Operational challenges were cited as the most significant hurdle to success in 2022. More than half of businesses said issues such as workforce, housing and supply chains were a greater challenge than consumer demand. A third of responders said operational capacity met demand. Less than 15 percent reported a lack of demand. Looking forward, operators cited fairly even concerns across all listed factors including water levels, workforce recruitment, delivering value and regulations on their operations. Lack of demand was ranked least concerning.

*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	28%	23%	31%
Pleased	40%	42%	37%
Satisfied	22%	31%	20%
Disappointed	7%	4%	8%
Very Disappointed	2%	0%	4%

Answer Options	Attractions	Recreation & Sports	Lodging	Food	Retail	Events/ Entertainment	Marine	Campgrounds	Agriculture/Craft Beverage	Other
Very Pleased	17%	27%	36%	13%	8%	23%	19%	0%	0%	16%
Pleased	38%	37%	44%	56%	58%	39%	37%	75%	50%	42%
Satisfied	33%	23%	21%	25%	17%	31%	37%	25%	33%	25%
Disappointed	13%	7%	0%	6%	8%	8%	7%	0%	0%	17%
Very Disappointed	0%	7%	0%	0%	8%	0%	0%	0%	17%	0%

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

	Overall	Ontario	New York
Much Better	25%	39%	18%
Somewhat Better	41%	50%	39%
About the Same	24%	8%	29%
Somewhat Worse	10%	4%	14%
Much Worse	1%	0%	1%

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

	Overall	Ontario	New York
Improve Significantly	25%	23%	22%
Improve Slightly	48%	50%	49%
Be About the Same	24%	23%	27%
Decline Slightly	2%	4%	1%
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	21%	27%	19%
Improve Slightly	50%	46%	49%
Be About the Same	24%	23%	27%
Decline Slightly	3%	4%	4%
Decline Significantly	1%	0%	1%

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

	Overall	Ontario	New York
More than 75%	41%	42%	40%
51% to 75%	17%	19%	15%
26% to 50%	21%	23%	20%
10% to 25%	16%	12%	20%
Less than 10%	5%	4%	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	25%	54%	14%	7%	0%
General economic conditions	5%	29%	20%	40%	7%
Canadian/US Dollar Exchange	3%	11%	66%	18%	3%
Ease of crossing border	4%	22%	32%	25%	17%
Gas prices	1%	4%	23%	43%	31%
Water levels	0%	11%	47%	29%	13%
Marketing of the 1000 Islands	11%	57%	31%	1%	0%
Competition from other areas	1%	11%	69%	19%	0%
US/Canadian relations	2%	15%	59%	23%	1%
Opening of new attractions nearby	4%	8%	48%	35%	4%
Covid-19	4%	8%	48%	35%	4%

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

Overall	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	6%	22%	40%	21%	11%
June	19%	34%	3%	10%	3%
July	52%	30%	14%	3%	2%
August	54%	27%	11%	6%	3%
September	20%	37%	23%	12%	8%
October	8%	16%	35%	18%	24%

New York	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	5%	23%	42%	18%	13%
June	19%	28%	37%	12%	4%
July	53%	33%	10%	3%	3%
August	54%	27%	10%	6%	4%
September	19%	33%	24%	14%	9%
October	4%	14%	36%	20%	26%

Ontario	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
May	8%	27%	31%	23%	12%
June	23%	39%	27%	8%	4%
July	46%	27%	23%	4%	0%
August	46%	35%	15%	4%	0%
September	19%	39%	31%	8%	4%
October	15%	23%	27%	15%	19%

Which factor was the most challenging to deal with in 2022?

	Overall	Ontario	New York
External challenges to operations, i.e. finding/retaining workforce, housing/daycare availability, supply chain/product supply delays and shortfalls, etc.	55%	64%	50%
Lack of demand. Not enough customers.	14%	12%	15%
No major challenges. Operational capacity met consumer demand.	32%	24%	35%

Thinking about 2023, rank the following based on your level of concern, with 5 being the most concerning and 1 being the least.

	1	2	3	4	5
Fluctuating water levels on the St. Lawrence River and Lake Ontario	21%	17%	13%	12%	37%
Ability to find workers	19%	19%	12%	21%	29%
Delivering value to customers despite rising costs of doing business	18%	5%	31%	27%	19%
Lack of interest in our region and what my operation(s) offer	26%	25%	29%	10%	11%
Government regulations such as border restrictions, forced closures and operations	14%	26%	18%	28%	16%

Which of the following best matches your 2022 marketing plans?

I will invest more resources into marketing to sustain and build demand.	20%
I will invest less into marketing because of scarcity of resources/other expenses.	7%
I will invest about the same in 2022 as I did in 2021 when it comes to marketing.	73%

Respondents: Total of 107 responses

Country	
USA	81
Canada	26

Respondents: Total of 108 responses

Type of Business:	
Attractions	24
Recreation & Sport	30
Lodging	39
Food	16
Retail	12
Events/Entertainment	13
Marine	27
Campgrounds	4
Agriculture/Craft Beverage	6
Other	12

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

	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	28%	29%	22%	14%	32%	15%	27%	23%	15%	16%	19%	19%	19%	15%	14%	26%	13%	21%	13%	23%	28%	22%	33%
Pleased	40%	34%	12%	30%	41%	27%	41%	35%	25%	28%	31%	29%	36%	22%	23%	30%	29%	34%	28%	27%	31%	23%	43%
Satisfied	22%	19%	20%	29%	18%	24%	20%	26%	37%	29%	30%	32%	31%	33%	34%	25%	27%	26%	29%	31%	26%	31%	13%
Disappointed	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	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:

	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	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	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	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	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	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:

	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	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	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	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	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	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:

	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	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	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%	10%	11%	36%	20%	29%	35%	30%	29%	29%	27%	36%	22%	29%	32%	27%	28%	30%	24%	20%	22%	19%	17%
Decline Slightly	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	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:

	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	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	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%	15%	19%	26%	25%	21%	25%	26%	24%	24%	26%	35%	22%	21%	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	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%	4%	0%	2%	1%	5%	1%	1%	2%	1%	2%	1%	2%	2%	1%	0%	0%	1%	2%	2%	2%	1%

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

Summer weather

	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	25%	18%	37%	19%	51%	8%	55%	33%	12%	14%	46%	31%	43%	9%	8%	36%	9%	51%	11%	42%	42%	2%	31%
Positive	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	14%	18%	28%	14%	6%	13%	7%	14%	18%	20%	13%	15%	13%	21%	17%	12%	22%	11%	20%	10%	7%	17%	15%
Negative	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	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

	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%	2%	0%	2%	4%	5%	7%	8%	1%	3%	3%	5%	3%	5%	4%	9%	7%	3%	3%	6%	14%	7%	14%
Positive	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	66%	78%	75%	58%	53%	50%	41%	35%	53%	53%	48%	47%	48%	51%	43%	36%	38%	50%	52%	35%	39%	29%	23%
Negative	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	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

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

Gas prices

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

General Economy

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

Lake/River Water Levels

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

Competition from other areas

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

Marketing of the 1000 Islands

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

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

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

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

	22	21	20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0
Very Strong	54%	54%	33%	35%	54%	36%	46%	39%	35%	33%	30%	30%	37%	29%	34%	46%	29%	34%	25%	37%	36%	33%
Fairly Strong	27%	24%	19%	37%	30%	30%	35%	39%	36%	41%	40%	36%	36%	35%	33%	32%	32%	37%	38%	37%	34%	36%
Moderate	11%	15%	18%	16%	13%	22%	10%	12%	21%	15%	18%	23%	21%	20%	20%	14%	25%	18%	24%	20%	25%	19%
Somewhat Weak	6%	4%	14%	10%	2%	8%	6%	9%	8%	8%	10%	8%	4%	11%	7%	7%	12%	10%	9%	4%	4%	8%
Very Weak	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 each summer month this year? (SEPTEMBER)

	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Very Strong	20%	22%	17%	15%	21%	13%	17%	13%	13%	12%	17%	9%	13%	10%	15%
Fairly Strong	37%	36%	25%	29%	39%	33%	32%	35%	26%	26%	25%	23%	25%	28%	22%
Moderate	24%	26%	19%	36%	21%	30%	30%	27%	31%	31%	34%	35%	36%	38%	31%
Somewhat Weak	12%	8%	13%	16%	15%	14%	16%	19%	21%	19%	13%	27%	16%	13%	18%
Very Weak	8%	8%	26%	5%	5%	7%	4%	6%	9%	12%	11%	7%	11%	11%	9%