

1000 Islands Tourism Business Survey

2017 REPORT AND SUMMARY

1000 Islands International Tourism Council
December, 2017

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. Those invited received both 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 November 1 and collected through December 1.

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, 177 surveys were returned.

Satisfaction with 2017 Business:

The satisfaction level indicated on this year's survey was one of the worst in two decades, a sharp contrast to last year's results. The combination of rainy early summer weather and resulting high water on the shores of Lake Ontario and the St. Lawrence River created difficult situations for many operators. While the May-June time period was particularly difficult, business later in the summer improved and the region appeared to have a strong fall.

Year to Year Performance

Compared to 2016, only 32% categorized 2017 business as "much" or "somewhat" better. Over half of Ontario operators rated it as "better" or "much better," while only 23% of the New York operators rated the season as better. It is likely that a larger percentage of the New York operators were directly impacted by the high water issues on Lake Ontario and the St. Lawrence River.

Future Confidence

Despite a gloomy evaluation of the 2017 season, those surveyed showed optimism for the future. Consistent with recent years, 72% forecast improvements in their own business in the next five years.

Factors Impacting Performance

Water Level is the big standout as a negative impact on 2017 business, with 69% saying it had a “negative” or “very negative” impact. Likewise, 2017 weather was seen as a negative. The general economy was seen slightly less positively this year than 2015 and 2016. The ease of crossing the border continued a trend in rising positives.

Types of Visitor Parties

This year’s survey asked about types of visitor parties. Couples were by far the most common type of visitors cited by those surveyed. Families were a smaller factor. About 10% of those surveyed indicated that groups (busses, weddings, meetings) were a significant part of their business.

Seasonality

This year’s survey asked about what percentage of business occurred in each season. Overall, those survey indicated two thirds of their business occurred in the summer.

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

Answer Options	Overall	Ontario	New York
Very Pleased	15.24%	23.08%	11.61%
Pleased	27.44%	36.54%	23.21%
Satisfied	24.39%	25.00%	24.11%
Disappointed	23.17%	11.54%	28.57%
Very Disappointed	9.76%	3.85%	12.50%

Answer Options	Attraction	Recreation	Lodging	Marine	Campground
Very Pleased	19.44%	8.11%	24.24%	7.50%	6.25%
Pleased	36.11%	18.92%	30.30%	15.00%	18.75%
Satisfied	13.89%	21.62%	28.79%	25.00%	31.25%
Disappointed	22.22%	43.24%	12.12%	35.00%	37.50%
Very Disappointed	8.33%	8.11%	4.55%	17.50%	6.25%

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

Answer Options	Overall	Ontario	New York
Much Better	11.66%	15.38%	9.91%
Somewhat Better	20.25%	36.54%	12.61%
About the Same	26.99%	25.00%	27.93%
Somewhat Worse	27.61%	19.23%	31.53%
Much Worse	13.50%	3.85%	18.02%

Answer Options	Attraction	Recreation	Lodging	Marine	Campground
Much Better	20.00%	2.63%	15.38%	10.00%	6.25%
Somewhat Better	17.14%	18.42%	30.77%	7.50%	18.75%
About the Same	22.86%	23.68%	29.23%	25.00%	25.00%
Somewhat Worse	31.43%	42.11%	15.38%	35.00%	37.50%
Much Worse	8.57%	13.16%	9.23%	22.50%	12.50%

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

	Overall	Ontario	New York
Much Better	3.87%	8.51%	1.85%
Somewhat Better	13.55%	29.79%	6.48%
About the Same	32.26%	40.43%	28.70%
Somewhat Worse	41.29%	21.28%	50.00%
Much Worse	9.03%	0.00%	12.96%

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

	Overall	Ontario	New York
Improve Significantly	20.50%	16.33%	22.32%
Improve Slightly	44.72%	46.94%	43.75%
Be About the Same	29.19%	34.69%	26.79%
Decline Slightly	4.97%	2.04%	6.25%
Decline Significantly	0.62%	0.00%	0.89%

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

	Overall	Ontario	New York
Improve Significantly	19.02%	16.33%	20.18%
Improve Slightly	53.37%	57.14%	51.75%
Be About the Same	21.47%	20.41%	21.93%
Decline Slightly	5.52%	6.12%	5.26%
Decline Significantly	0.61%	0.00%	0.88%

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

Overall	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	3.01%	7.83%	25.90%	24.10%	33.13%
JUNE	6.63%	18.67%	27.11%	23.49%	21.08%
JULY	28.31%	30.12%	16.27%	14.46%	8.43%
AUGUST	35.54%	30.12%	21.69%	8.43%	3.01%
SEPT.	13.25%	33.13%	30.12%	13.86%	7.23%
OCT.	4.82%	17.47%	24.70%	19.88%	19.88%

New York	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	1.87%	5.61%	26.17%	26.17%	40.19%
JUNE	5.36%	17.86%	27.68%	23.21%	25.89%
JULY	24.78%	29.20%	17.70%	19.47%	8.85%
AUGUST	30.97%	30.09%	23.01%	12.39%	3.54%
SEPT.	9.09%	33.64%	30.91%	17.27%	9.09%
OCT.	2.08%	16.67%	30.21%	25.00%	26.04%

Ontario	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	6.12%	14.29%	30.61%	24.49%	24.49%
JUNE	10.20%	22.45%	28.57%	26.53%	12.24%
JULY	38.78%	34.69%	14.29%	4.08%	8.16%
AUGUST	47.06%	31.37%	19.61%	0.00%	1.96%
SEPT.	23.08%	34.62%	30.77%	7.69%	3.85%
OCT.	12.50%	27.08%	25.00%	18.75%	16.67%

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	7.83%	22.89%	12.65%	33.73%	19.28%
General economic conditions	4.82%	35.54%	39.16%	16.27%	1.81%
Canadian/US dollar exchange rate	4.82%	22.29%	50.00%	19.28%	0.60%
Ease of crossing border	3.61%	21.08%	52.41%	16.27%	2.41%
Gas prices	5.42%	25.30%	50.00%	15.66%	1.81%
Water levels	1.81%	9.64%	18.07%	28.92%	39.76%
Marketing of the 1000 Islands	9.04%	54.82%	28.92%	3.01%	0.60%
Competition from other areas	0.60%	12.65%	63.25%	15.06%	3.61%
Opening of new attractions nearby	3.01%	33.73%	53.61%	4.22%	1.20%

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

Ontario	Very Positive	Positive	No Effect	Negative	Very Negative
Summer weather	6.00%	16.00%	26.00%	32.00%	20.00%
General economic conditions	2.00%	38.00%	44.00%	12.00%	4.00%
Canadian/US dollar exchange rate	12.00%	44.00%	30.00%	14.00%	0.00%
Ease of crossing border	2.04%	30.61%	42.86%	18.37%	6.12%
Gas prices	5.88%	9.80%	47.06%	33.33%	3.92%
Water levels	2.04%	6.12%	30.61%	24.49%	36.73%
Marketing of the 1000 Islands	2.17%	58.70%	34.78%	4.35%	0.00%
Competition from other areas	0.00%	6.67%	64.44%	24.44%	4.44%
Opening of new attractions nearby	8.16%	40.82%	44.90%	4.08%	2.04%

New York	Very Positive	Positive	No Effect	Negative	Very Negative
Summer weather	9.09%	27.27%	7.27%	36.36%	20.00%
General economic conditions	6.25%	35.71%	38.39%	18.75%	0.89%
Canadian/US dollar exchange rate	1.80%	13.51%	61.26%	22.52%	0.90%
Ease of crossing border	4.55%	18.18%	60.00%	16.36%	0.91%
Gas prices	5.36%	33.04%	52.68%	8.04%	0.89%
Water levels	1.75%	11.40%	13.16%	31.58%	42.11%
Marketing of the 1000 Islands	12.28%	56.14%	28.07%	2.63%	0.88%
Competition from other areas	0.88%	15.93%	67.26%	12.39%	3.54%
Opening of new attractions nearby	0.91%	32.73%	60.91%	4.55%	0.91%

Considering your current business, how would you estimate the percentage of the following types of visitor parties?

Type of Visitor Party	Not a part of my business (0%)	A small part of my business (<15%)	A good part of my business (16% - 35%)	A large part of my business (36% - 55%)	The biggest part of my business (Over 55%)
Single visitors	18.75%	63.75%	11.88%	4.38%	1.25%
Working age couples (ages 20-65)	1.85%	9.26%	38.27%	37.65%	12.96%
Retirement age couples (ages 65+)	2.99%	21.56%	31.14%	34.73%	9.58%
Families with school age children	9.76%	35.98%	28.66%	17.07%	8.54%
Small groups (friends traveling together)	9.43%	36.48%	32.08%	17.61%	4.40%
Large groups (buses, weddings, etc.)	50.00%	30.86%	8.64%	8.64%	1.85%
Extended families (parents, adult children, grandchildren)	12.27%	50.92%	27.61%	6.75%	2.45%

About what percentage of your business occurs in each of the seasons?

Answer Choices	Average Percentage
Spring (March - May)	12%
Summer (June - August)	67%
Fall (September - November)	18%
Winter (December - February)	4%

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

Answer Choices	Responses
Less than 10%	6.98%
10% to 25%	13.37%
26% to 50%	6.98%
51% to 75%	18.60%
More than 75%	54.07%

Respondents: Total of 177 responses

Country	
USA	68.67%
Canada	31.33%

Type of business (could check multiple):	
Attraction	21.56%
Recreation	22.75%
Lodging	40.12%
Restaurant/Bar	5.99%
Retailer	9.58%
Entertainment	6.59%
Marine	23.35%
Campground	9.58%
Craft Beverage / Ag Producer	5.99%
Attraction	21.56%

Business satisfaction and perception questions

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

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Pleased	15%	27%	23%	15%	16%	19%	19%	19%	15%	14%	26%	13%	21%	13%	23%	28%	22%	33%
Pleased	27%	41%	35%	25%	28%	31%	29%	36%	22%	23%	30%	29%	34%	28%	27%	31%	23%	43%
Satisfied	24%	20%	26%	37%	29%	30%	32%	31%	33%	34%	25%	27%	26%	29%	31%	26%	31%	13%
Disappointed	23%	9%	14%	22%	22%	20%	17%	13%	22%	24%	17%	26%	17%	28%	17%	12%	25%	10%
Very Disappointed	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:

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Much Better	12%	17%	15%	10%	8%	12%	7%	13%	9%	8%	15%	5%	14%	11%	6%	15%	13%	25%
Somewhat Better	20%	45%	39%	26%	27%	34%	30%	35%	23%	21%	40%	28%	31%	27%	37%	42%	32%	44%
About the Same	27%	26%	26%	34%	33%	31%	35%	30%	34%	35%	28%	35%	36%	35%	30%	26%	22%	23%
Somewhat Worse	28%	10%	18%	26%	25%	21%	24%	20%	26%	28%	15%	25%	18%	22%	19%	15%	31%	5%
Much Worse	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:

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Much Better	4%	16%	8%	6%	5%	7%	5%	11%	2%	1%	8%	0%	3%	5%	6%	4%	5%	20%
Somewhat Better	14%	47%	38%	23%	18%	31%	18%	34%	8%	11%	26%	12%	27%	19%	24%	33%	16%	49%
About the Same	32%	28%	38%	41%	45%	44%	49%	38%	48%	42%	44%	44%	48%	42%	40%	38%	37%	23%
Somewhat Worse	41%	9%	16%	26%	27%	16%	26%	15%	37%	35%	20%	40%	20%	30%	26%	15%	41%	7%
Much Worse	9%	1%	2%	4%	4%	1%	2%	2%	6%	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:

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Improve Significantly	21%	21%	15%	12%	16%	10%	12%	14%	11%	4%	16%	10%	14%	21%	16%	20%	18%	30%
Improve Slightly	45%	40%	47%	47%	43%	55%	41%	56%	48%	33%	42%	44%	38%	45%	57%	46%	52%	38%
Be About the Same	29%	35%	30%	29%	29%	27%	36%	22%	29%	32%	27%	28%	30%	24%	20%	22%	19%	17%
Decline Slightly	5%	4%	8%	10%	11%	7%	10%	9%	10%	21%	15%	15%	18%	5%	5%	7%	9%	10%
Decline Significantly	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:

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Improve Significantly	19%	20%	19%	20%	15%	14%	16%	16%	19%	12%	26%	19%	18%	25%	22%	31%	27%	35%
Improve Slightly	53%	47%	47%	49%	53%	53%	42%	54%	51%	43%	41%	46%	46%	50%	56%	44%	52%	43%
Be About the Same	21%	25%	26%	24%	24%	26%	35%	22%	21%	25%	25%	29%	25%	17%	13%	18%	16%	17%
Decline Slightly	6%	4%	8%	6%	6%	6%	5%	7%	6%	14%	7%	6%	11%	6%	7%	3%	4%	4%
Decline Significantly	1%	5%	1%	1%	2%	1%	2%	1%	2%	2%	1%	0%	0%	1%	2%	2%	2%	1%

Monthly trend questions:

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

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Strong	7%	12%	7%	4%	6%	12%	6%	12%	10%	11%	12%	8%	8%	7%	7%	12%	8%	
Fairly Strong	19%	34%	25%	25%	18%	30%	20%	21%	24%	21%	30%	15%	26%	18%	19%	23%	24%	
Moderate	27%	32%	42%	36%	34%	32%	41%	36%	25%	35%	32%	35%	37%	36%	28%	35%	33%	
Somewhat Weak	23%	20%	20%	26%	31%	18%	25%	22%	29%	19%	17%	29%	22%	26%	32%	20%	24%	
Very Weak	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)

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Strong	28%	46%	39%	32%	27%	29%	28%	32%	28%	25%	13%	24%	34%	19%	28%	35%	25%	
Fairly Strong	30%	35%	38%	34%	33%	36%	35%	33%	23%	33%	30%	30%	33%	36%	34%	29%	33%	
Moderate	16%	15%	16%	19%	24%	22%	25%	24%	27%	24%	32%	25%	23%	27%	24%	20%	19%	
Somewhat Weak	14%	2%	6%	12%	11%	11%	9%	8%	15%	11%	18%	16%	8%	12%	11%	12%	20%	
Very Weak	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)

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Strong	36%	46%	39%	35%	33%	30%	30%	37%	29%	34%	46%	29%	34%	25%	37%	36%	33%	
Fairly Strong	30%	35%	39%	36%	41%	40%	36%	36%	35%	33%	32%	32%	37%	38%	37%	34%	36%	
Moderate	22%	10%	12%	21%	15%	18%	23%	21%	20%	20%	14%	25%	18%	24%	20%	25%	19%	
Somewhat Weak	8%	6%	9%	8%	8%	10%	8%	4%	11%	7%	7%	12%	10%	9%	4%	4%	8%	
Very Weak	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)

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Strong	13%	17%	13%	13%	12%	17%	9%	13%	10%	15%	21%							
Fairly Strong	33%	32%	35%	26%	26%	25%	23%	25%	28%	22%	29%							
Moderate	30%	30%	27%	31%	31%	34%	35%	36%	38%	31%	26%							
Somewhat Weak	14%	16%	19%	21%	19%	13%	27%	16%	13%	18%	14%							
Very Weak	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

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	8%	55%	33%	12%	14%	46%	31%	43%	9%	8%	36%	9%	51%	11%	42%	42%	2%	31%
Positive	23%	32%	44%	33%	29%	31%	43%	37%	17%	21%	42%	33%	29%	14%	36%	35%	14%	45%
No Effect	13%	7%	14%	18%	20%	13%	15%	13%	21%	17%	12%	22%	11%	20%	10%	7%	17%	15%
Negative	34%	2%	7%	32%	27%	8%	10%	6%	36%	38%	8%	29%	8%	39%	10%	14%	45%	9%
Very Negative	19%	4%	1%	5%	9%	2%	2%	1%	18%	12%	1%	7%	1%	12%	1%	0%	22%	0%

Canadian/US dollar exchange rate

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	5%	7%	8%	1%	3%	3%	5%	3%	5%	4%	9%	7%	3%	3%	6%	14%	7%	14%
Positive	22%	18%	20%	21%	26%	27%	20%	21%	15%	21%	22%	21%	20%	14%	28%	16%	28%	15%
No Effect	50%	41%	35%	53%	53%	48%	47%	48%	51%	43%	36%	38%	50%	52%	35%	39%	29%	23%
Negative	19%	25%	27%	20%	17%	17%	22%	23%	24%	22%	22%	26%	25%	27%	21%	19%	23%	25%
Very Negative	1%	8%	10%	5%	1%	4%	5%	5%	4%	6%	10%	6%	1%	0%	10%	11%	13%	22%

Ease of crossing the border

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	4%	2%	2%	1%	6%	2%	4%	2%	7%	2%	1%	3%	2%	3%				
Positive	21%	23%	23%	21%	20%	15%	15%	13%	9%	9%	10%	8%	6%	3%				
No Effect	52%	49%	47%	53%	42%	50%	41%	42%	33%	44%	38%	33%	41%	41%				
Negative	16%	22%	22%	20%	28%	28%	28%	29%	32%	29%	36%	42%	34%	37%				
Very Negative	2%	4%	5%	5%	5%	5%	12%	14%	18%	10%	13%	13%	16%	10%				

Gas prices

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	5%	12%	15%	4%	6%	3%	5%	2%	9%	5%	2%	6%	3%	3%		3%		
Positive	25%	56%	53%	17%	11%	7%	10%	16%	12%	5%	8%	6%	7%	8%		7%		
No Effect	50%	25%	22%	25%	25%	15%	19%	38%	46%	11%	29%	15%	20%	23%		47%		
Negative	16%	6%	8%	45%	51%	58%	51%	36%	27%	44%	46%	45%	48%	47%		36%		
Very Negative	2%	1%	1%	8%	7%	17%	14%	8%	5%	28%	15%	24%	20%	15%		7%		

General Economy

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	5%	9%	10%	4%	7%	2%	5%	3%	6%	5%	2%			4%	3%	1%		
Positive	36%	49%	40%	27%	20%	20%	14%	17%	12%	7%	24%			14%	21%	17%		
No Effect	39%	23%	18%	18%	19%	24%	19%	25%	23%	21%	35%			24%	29%	34%		
Negative	16%	15%	29%	43%	48%	46%	52%	46%	45%	51%	35%			47%	41%	41%		
Very Negative	2%	3%	2%	8%	6%	9%	11%	9%	14%	10%	4%			6%	6%	5%		

Lake/River Water Levels

	17	16	15	14	13	12	11	10	09	08	07	06	05	04	02	01	00	99
Very Positive	2%	4%	6%	3%	7%	1%	4%	5%	4%	5%	2%	2%	1%					
Positive	10%	19%	29%	22%	19%	1%	14%	6%	14%	21%	8%	6%	13%					
No Effect	18%	52%	53%	57%	47%	35%	62%	57%	63%	56%	48%	68%	58%					
Negative	29%	16%	9%	14%	23%	42%	12%	22%	15%	9%	29%	20%	16%					
Very Negative	40%	9%	3%	4%	3%	21%	6%	11%	4%	4%	10%	3%	7%					

Competition from other areas

	17	16	15	14	13
Very Positive	1%	1%	3%	3%	2%
Positive	13%	16%	14%	14%	10%
No Effect	63%	61%	55%	57%	56%
Negative	15%	21%	26%	23%	28%
Very Negative	4%	2%	3%	3%	3%

Awareness of the 1000 Islands as a destination

	17	16	15	14	13
Very Positive	9%	14%	14%	7%	9%
Positive	55%	60%	57%	56%	56%
No Effect	29%	23%	23%	27%	25%
Negative	3%	2%	6%	9%	9%
Very Negative	1%	1%	1%	1%	1%

Prepared by:

Thousand Islands International Tourism Council

In USA:

43373 Collins Landing, Alexandria Bay, NY 13607

In Canada:

Box 69, Lansdowne, ON K0E 1L0

Online:

www.TICouncil.com for business information

www.Visit1000Islands.com for consumer website