

# 1000 Islands Tourism Business Survey

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2019 REPORT AND SUMMARY

1000 Islands International Tourism Council  
December, 2019

## **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 over half of their trade from tourists.

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 October 20 and collected through December 10. This is a later release and open period than previous years to glean responses on the fall tourism season.

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, 211 surveys were returned.

## **Satisfaction with 2019 Business:**

The satisfaction level indicated on this year's survey closely reflects responses from 2017, when the region experienced similar high water levels along Lake Ontario and the St. Lawrence River. Satisfaction levels are more negative than 2018, which demonstrated a rebound from 2017 with record-high satisfaction levels. Regardless, nearly three-quarters of responders reported being pleased or satisfied with 2019.

## **Year to Year Performance**

Asked to compare 2019 to last year, responders broke evenly among those reporting a better season, businesses seeing stable performance and operations reporting a loss. Performance reviews are more positive this year than in 2017, the last time the region was impacted by high water levels.

## **Future Confidence**

While overall business in the region is estimated to improve by more than half of responders, there's greater growth in those anticipating a more status quo future. 2019 and 2017 produced more tempered expectations, however both returned more favorable forecasts during 2008's recession.

## **Factors Impacting Performance**

Unsurprisingly, water levels drew the most negative responses, with similar results as 2017. Feelings about the general economy fell significantly since 2018 from positivity to more neutral.

## **Social Media**

Following up on last year's inquiry, this survey asked businesses to estimate how much of their marketing happens on digital and social media platforms. The average response was greater than 60% and more than half of responders estimated that their digital and social media marketing will grow in 2020.

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

<b>Answer Options</b>	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Very Pleased	14%	19%	13%
Pleased	30%	35%	27%
Satisfied	29%	25%	31%
Disappointed	20%	17%	20%
Very Disappointed	8%	4%	9%

<b>Answer Options</b>	<b>Attraction</b>	<b>Recreation &amp; Sport</b>	<b>Lodging</b>	<b>Food</b>	<b>Retail</b>	<b>Events/ Entertainment</b>	<b>Marine</b>	<b>Camp-ground</b>	<b>Agriculture / Craft Beverage</b>	<b>Other</b>
Very Pleased	19%	19%	11%	0%	21%	12%	9%	0%	10%	19%
Pleased	42%	27%	28%	45%	16%	24%	17%	23%	20%	25%
Satisfied	28%	33%	30%	30%	16%	41%	26%	46%	40%	19%
Disappointed	6%	13%	20%	25%	32%	12%	30%	23%	10%	31%
Very Disappointed	6%	8%	10%	0%	16%	12%	17%	7%	20%	6%

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

	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Much Better	2%	6%	2%
Somewhat Better	21%	33%	24%
About the Same	49%	25%	42%
Somewhat Worse	23%	29%	26%
Much Worse	6%	6%	7%

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

	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Improve Significantly	14%	9%	14%
Improve Slightly	45%	45%	45%
Be About the Same	36%	43%	34%
Decline Slightly	5%	2%	6%
Decline Significantly	2%	2%	1%

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

	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Improve Significantly	15%	15%	13%
Improve Slightly	53%	46%	56%
Be About the Same	26%	33%	24%
Decline Slightly	6%	6%	6%
Decline Significantly	0%	0%	1%

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

<b>Overall</b>	<b>Very Strong</b>	<b>Fairly Strong</b>	<b>Moderate</b>	<b>Somewhat Weak</b>	<b>Very Weak</b>
MAY	5%	12%	27%	26%	32%
JUNE	9%	20%	31%	23%	18%
JULY	29%	35%	20%	11%	5%
AUGUST	35%	37%	16%	10%	2%
SEPT.	15%	29%	36%	16%	5%
OCT.	5%	17%	32%	27%	19%

<b>New York</b>	<b>Very Strong</b>	<b>Fairly Strong</b>	<b>Moderate</b>	<b>Somewhat Weak</b>	<b>Very Weak</b>
MAY	4%	11%	26%	20%	40%
JUNE	6%	21%	30%	22%	22%
JULY	24%	34%	19%	11%	2%
AUGUST	30%	37%	19%	11%	2%
SEPT.	13%	30%	35%	17%	6%
OCT.	4%	17%	34%	25%	20%

<b>Ontario</b>	<b>Very Strong</b>	<b>Fairly Strong</b>	<b>Moderate</b>	<b>Somewhat Weak</b>	<b>Very Weak</b>
MAY	11%	11%	28%	37%	13%
JUNE	19%	21%	31%	23%	6%
JULY	46%	33%	10%	8%	2%
AUGUST	50%	38%	14%	6%	2%
SEPT.	23%	25%	34%	13%	4%
OCT.	11%	16%	27%	31%	16%

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

<b>Overall</b>	<b>Very Positive</b>	<b>Positive</b>	<b>No Effect</b>	<b>Negative</b>	<b>Very Negative</b>
Summer weather	19%	44%	14%	19%	4%
General economic conditions	8%	39%	33%	19%	2%
Canadian/US dollar exchange rate	2%	19%	58%	18%	4%
Ease of crossing border	2%	20%	56%	21%	2%
Gas prices	2%	20%	56%	22%	1%
Water levels	2%	6%	26%	29%	38%
Marketing of the 1000 Islands	12%	57%	29%	3%	0%
Competition from other areas	1%	13%	61%	24%	2%
USA/Canada Relations	2%	18%	70%	10%	1%
Opening of new attractions nearby	5%	25%	66%	3%	18%

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

	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Less than 10%	9%	6%	11%
10% to 25%	13%	13%	14%
26% to 50%	13%	15%	13%
51% to 75%	20%	17%	20%
More than 75%	44%	50%	41%

**Thinking about the past three years, approximately what percentage of your marketing is done on digital or social networks?**

<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
62%	57%	63%

**Thinking about 2020, do you expect your digital or social marketing to ...**

	<b>Overall</b>	<b>Ontario</b>	<b>New York</b>
Increase	53%	47%	55%
Remain about the same	47%	51%	45%
Decrease	<1%	2%	0%

**Respondents: Total of 211 responses**

<b>Country</b>	
USA	67%
Canada	23%

<b>Type of Business</b>	
Attractions	36
Recreation & Sport	48
Lodging	80
Food	20
Retail	19
Events/Entertainment	17
Marine	46
Campgrounds	13
Agricultural / Craft Beverage	10
Other	16

**Business satisfaction and perception questions**

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

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

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

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

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

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

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

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

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

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

**Summer weather**

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

**Canadian/US dollar exchange**

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

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

**Gas prices**

	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Positive	2%	6%	5%	12%	15%	4%	6%	3%	5%	2%	9%	5%	2%	6%	3%	3%		3%		
Positive	20%	22%	25%	56%	53%	17%	11%	7%	10%	16%	12%	5%	8%	6%	7%	8%		7%		
No Effect	55%	47%	50%	25%	22%	25%	25%	15%	19%	38%	46%	11%	29%	15%	20%	23%		47%		
Negative	22%	24%	16%	6%	8%	45%	51%	58%	51%	36%	27%	44%	46%	45%	48%	47%		36%		
Very Negative	1%	2%	2%	1%	1%	8%	7%	17%	14%	8%	5%	28%	15%	24%	20%	15%		7%		

**General Economy**

	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99	
Very Positive	8%	19%	5%	9%	10%	4%	7%	2%	5%	3%	6%	5%	2%			4%	3%	1%		
Positive	39%	59%	36%	49%	40%	27%	20%	20%	14%	17%	12%	7%	24%			14%	21%	17%		
No Effect	33%	11%	39%	23%	18%	18%	19%	24%	19%	25%	23%	21%	35%			24%	29%	34%		
Negative	19%	10%	16%	15%	29%	43%	48%	46%	52%	46%	45%	51%	35%			47%	41%	41%		
Very Negative	2%	1%	2%	3%	2%	8%	6%	9%	11%	9%	14%	10%	4%			6%	6%	5%		

**Lake/River Water Levels**

	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	2	1	0	99
Very Positive	2%	17%	2%	4%	6%	3%	7%	1%	4%	5%	4%	5%	2%	2%	1%					
Positive	6%	35%	10%	19%	29%	22%	19%	1%	14%	6%	14%	21%	8%	6%	13%					
No Effect	26%	38%	18%	52%	53%	57%	47%	35%	62%	57%	63%	56%	48%	68%	58%					
Negative	29%	9%	29%	16%	9%	14%	23%	42%	12%	22%	15%	9%	29%	20%	16%					
Very Negative	38%	1%	40%	9%	3%	4%	3%	21%	6%	11%	4%	4%	10%	3%	7%					

**Competition from other areas**

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

**Awareness of the 1000 Islands as a destination**

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