

1000 Islands Tourism Business Survey

2016 REPORT AND SUMMARY

1000 Islands International Tourism Council
December, 2016

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 the 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's survey also included questions about use of social media, trends in overseas visitors and business climate perceptions.

Observations:

Satisfaction with 2016 Business:

The satisfaction level indicated on this year's survey was one of the best in two decades. The combination of good summer weather, reasonable gas prices and a decent economy worked to boost tourism in the 2016 season. With those factors aligned, efforts to market the region also worked well in attracting new and repeat visitors. Canadian responses were particularly positive, indicating excellent year-over-year improvements in business and a positive impact from the currency exchange rate.

Year to Year Performance

Compared to 2015, 62% categorized 2016 business as "much" or "somewhat" better. The greatest year-to-year improvement since 1999. Although the percentage of New York and Ontario operators rating the season as better was similar, Ontario operators were more likely to rate it as "much better" than New York operators. Recreation businesses indicated less improvement than other sectors.

Future Confidence

This year's survey had a big jump in those feeling that the region's business would "improve significantly" over the next five years. This year, 23% looked for significant future improvement (the highest in the last ten years had been 16%). However, the survey also showed that 5% anticipate a "significant" decline in their own business – the highest number in the life of the survey.

Factors Impacting Performance

Weather is the big standout as a positive impact on 2016 business, with 57% saying it had a “very positive” impact. That is, by far, the most positive rating for weather in the life of the survey (since 1999). The general economy and gas prices were also seen as having a positive impact by some of the highest numbers in the life of the survey.

Social Media

About two-thirds of those surveyed said they were using social media as part of their marketing. Of those, two thirds had increased the use of social media over the past year, while 8% had decreased the use of social media.

Overseas Customers

Overseas visitors appear to be increasing as 39% of those surveyed indicated some level of increase in overseas visitors, while 11% observed a decrease. Overseas visitors were not seen as a factor by 12% of those surveyed. There is a difference in responses between New York and Ontario, with more Ontarians seeing either a decrease or increase.

Business Climate

This year’s survey asked about a series of factors regarding the region’s business climate. The two most challenging factors were finding qualified employees and dealing with government regulations. Access to Internet and cell service was rated as good by the majority. The view on retaining employees was split three ways, with the “not a factor,” “good,” and “challenging” categories each getting about a third of the responses. Marketing for new customers had the fewest “not a factor” responses (10%) and more of those surveyed found it “challenging” rather than “good.”

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

Answer Options	Overall	Ontario	New York
Very Pleased	26.9%	29.3%	24.8%
Pleased	41.3%	48.3%	36.6%
Satisfied	19.8%	10.3%	26.7%
Disappointed	9.0%	5.2%	10.9%
Very Disappointed	3.0%	6.9%	1.0%

Answer Options	Attraction	Recreation	Lodging	Restaurant	Retailer	Entertainment	Marine	Campground
Very Pleased	36%	24%	25%	46%	29%	36%	32%	47%
Pleased	36%	35%	45%	31%	41%	36%	42%	29%
Satisfied	17%	19%	19%	15%	12%	17%	23%	24%
Disappointed	8%	11%	8%	8%	12%	8%	3%	0%
Very Disappointed	3%	11%	3%	0%	6%	3%	0%	0%

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	17.0%	26.3%	12.0%
Somewhat Better	44.8%	35.1%	49.0%
About the Same	26.1%	28.1%	26.0%
Somewhat Worse	10.3%	8.8%	12.0%
Much Worse	1.8%	1.8%	1.0%

	Attraction	Recreation	Lodging	Restaurant/Bar	Retailer	Entertainment	Marine	Campground
Much Better	25%	8%	17%	38%	13%	18%	21%	12%
Somewhat Better	50%	44%	44%	46%	38%	45%	48%	59%
About the Same	17%	22%	27%	8%	38%	27%	31%	29%
Somewhat Worse	8%	22%	9%	8%	6%	9%	0%	0%
Much Worse	0%	3%	3%	0%	6%	0%	0%	0%

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

	Overall	Ontario	New York
Much Better	16.0%	20.8%	12.7%
Somewhat Better	47.2%	39.6%	51.0%
About the Same	27.6%	28.3%	29.4%
Somewhat Worse	8.6%	9.4%	6.9%
Much Worse	0.6%	1.9%	0.0%

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

	Overall	Ontario	New York
Improve Significantly	20.8%	22.2%	19.8%
Improve Slightly	39.6%	33.3%	42.6%
Be About the Same	34.6%	35.2%	35.6%
Decline Slightly	3.8%	5.6%	2.0%
Decline Significantly	1.3%	3.7%	0.0%

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

	Overall	Ontario	New York
Improve Significantly	19.6%	19.6%	18.4%
Improve Slightly	46.6%	35.7%	53.4%
Be About the Same	24.5%	28.6%	23.3%
Decline Slightly	4.3%	5.4%	2.9%
Decline Significantly	4.9%	10.7%	1.9%

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

Overall	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	6.1%	19.0%	42.9%	21.1%	10.9%
JUNE	11.6%	34.2%	32.3%	20.0%	1.9%
JULY	46.0%	35.4%	14.9%	2.5%	1.2%
AUGUST	45.7%	35.4%	10.4%	6.1%	2.4%
SEPTEMBER	17.1%	32.3%	30.4%	15.8%	4.4%
OCTOBER	4.9%	16.2%	28.9%	25.4%	24.6%

New York	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	3.2%	19.4%	46.2%	17.2%	14.0%
JUNE	7.3%	35.4%	33.3%	21.9%	2.1%
JULY	42.4%	36.4%	17.2%	4.0%	0.0%
AUGUST	41.0%	39.0%	11.0%	7.0%	2.0%
SEPTEMBER	11.1%	31.3%	34.3%	17.2%	6.1%
OCTOBER	3.5%	11.8%	29.4%	27.1%	28.2%

Ontario	Very Strong	Fairly Strong	Moderate	Somewhat Weak	Very Weak
MAY	10.4%	18.8%	39.6%	27.1%	4.2%
JUNE	17.0%	35.8%	28.3%	18.9%	0.0%
JULY	51.8%	33.9%	12.5%	0.0%	1.8%
AUGUST	55.2%	27.6%	10.3%	5.2%	1.7%
SEPTEMBER	30.2%	32.1%	24.5%	13.2%	0.0%
OCTOBER	7.8%	21.6%	31.4%	21.6%	17.6%

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	55.5%	31.7%	6.7%	1.8%	4.3%
General economic conditions	9.5%	49.4%	22.8%	15.2%	3.2%
Canadian/US dollar exchange rate	7.4%	18.4%	41.1%	25.2%	8.0%
Ease of crossing border	2.5%	22.8%	49.4%	21.6%	3.7%
Gas prices	11.7%	56.2%	25.3%	6.2%	0.6%
Water levels	4.4%	18.9%	52.2%	15.7%	8.8%
Marketing of the 1000 Islands	14.2%	60.5%	22.8%	1.9%	0.6%
Competition from other areas	0.6%	15.6%	61.3%	20.6%	1.9%
Opening of new attractions nearby	7.5%	32.9%	55.3%	3.7%	0.6%

New York	Very Positive	Positive	No Effect	Negative	Very Negative
Summer weather	58.3%	31.1%	5.8%	1.9%	2.9%
General economic conditions	11.2%	50.0%	20.4%	14.3%	4.1%
Canadian/US dollar exchange rate	1.0%	6.9%	45.1%	36.3%	10.8%
Ease of crossing border	1.0%	15.8%	53.5%	24.8%	5.0%
Gas prices	13.7%	67.6%	15.7%	2.9%	0.0%
Water levels	5.0%	22.0%	43.0%	17.0%	13.0%
Marketing of the 1000 Islands	15.0%	60.0%	21.0%	3.0%	1.0%
Competition from other areas	0.0%	16.8%	61.4%	18.8%	3.0%
Opening of new attractions nearby	4.0%	37.6%	55.4%	2.0%	1.0%

Ontario	Very Positive	Positive	No Effect	Negative	Very Negative
Summer weather	50.9%	33.3%	7.0%	1.8%	7.0%
General economic conditions	7.1%	46.4%	28.6%	17.9%	0.0%
Canadian/US dollar exchange rate	17.5%	40.4%	35.1%	5.3%	1.8%
Ease of crossing border	5.3%	31.6%	43.9%	17.5%	1.8%
Gas prices	7.1%	33.9%	44.6%	12.5%	1.8%
Water levels	3.6%	10.9%	69.1%	14.5%	1.8%
Marketing of the 1000 Islands	8.6%	63.8%	27.6%	0.0%	0.0%
Competition from other areas	1.8%	14.5%	60.0%	23.6%	0.0%
Opening of new attractions nearby	12.5%	23.2%	57.1%	7.1%	0.0%

Considering your own experience, how would you rate the local business climate on following factors?

Overall	Very Good	Somewhat Good	Somewhat Challenging	Very Challenging	Not a factor
Finding qualified employees	3.7%	10.6%	34.8%	24.8%	26.1%
Retaining employees	13.2%	22.6%	22.0%	13.2%	28.9%
Obtaining business financing	5.1%	15.8%	10.1%	13.3%	55.7%
Marketing for new customers	4.3%	35.4%	37.9%	10.6%	11.8%
Obtaining government services	2.0%	9.2%	14.4%	21.6%	52.9%
Dealing with government regulations	2.6%	5.2%	31.6%	34.2%	26.5%
Partnering with other businesses	8.3%	33.3%	19.2%	5.1%	34.0%
Access to Internet and cell service	25.9%	36.7%	16.5%	7.6%	13.3%

New York	Very Good	Somewhat Good	Somewhat Challenging	Very Challenging	Not a factor
Finding qualified employees	2.9%	8.7%	35.0%	25.2%	28.2%
Retaining employees	10.7%	23.3%	21.4%	12.6%	32.0%
Obtaining business financing	8.0%	14.0%	11.0%	14.0%	53.0%
Marketing for new customers	3.9%	34.3%	45.1%	6.9%	9.8%
Obtaining government services	1.0%	6.2%	14.4%	20.6%	57.7%
Dealing with government regulations	2.0%	3.1%	26.5%	39.8%	28.6%
Partnering with other businesses	9.0%	26.0%	22.0%	7.0%	36.0%
Access to Internet and cell service	21.8%	35.6%	15.8%	9.9%	16.8%

Do you use social media to market your business? (Facebook, Twitter, Instagram, etc.)

Yes	66.3%
No	33.7%

If yes, how would you describe your use of social media over the past year?

Stayed the same	21.6%
Increased somewhat	48.6%
Increased significantly	21.6%
Decreased somewhat	8.1%
Decreased significantly	0.0%

How would you describe the number of overseas visitors you see in your business?

Overall	
Not applicable	11.8%
Increasing significantly	15.7%
Increasing slightly	22.8%
About the same	38.6%
Decreasing slightly	7.1%
Decreasing significantly	3.9%

New York	
Not applicable	15.4%
Increasing significantly	10.3%
Increasing slightly	21.8%
About the same	47.4%
Decreasing slightly	2.6%
Decreasing significantly	2.6%

Ontario	
Not applicable	6.4%
Increasing significantly	25.5%
Increasing slightly	23.4%
About the same	25.5%
Decreasing slightly	12.8%
Decreasing significantly	6.4%

Respondents: Total of 172 responses

Country	Response Percent
USA	64%
Canada	36%

Type of business (could check multiple):	
Answer Options	Response Percent
Attraction	22.6%
Recreation	24.5%
Lodging	42.8%
Restaurant/Bar	8.2%
Retailer	11.3%
Entertainment	6.9%
Marine	20.1%
Campground	10.7%
Other	11.9%

What is your estimate of the percentage of your business that comes from tourists?	
Answer Options	Response Percent
Less than 10%	5.5%
10% to 25%	12.7%
26% to 50%	17.0%
51% to 75%	21.2%
More than 75%	43.6%

Business satisfaction and perception questions

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

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

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

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

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

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

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

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

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

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

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

Canadian/US dollar exchange rate

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

Ease of crossing the border

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

Gas prices

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

General Economy

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

Lake/River Water Levels

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

Competition from other areas

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

Awareness of the 1000 Islands as a destination

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

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