



Outdoor Ministries Connection

2020 Director Survey

Full Data Report

Participating Organizations:

United Methodist Camp and Retreat Ministries

Lutheran Outdoor Ministries

Presbyterian Church Camp and Conference Association

Episcopal Camps and Conference Centers

Outdoor Ministry Association of the United Church of Christ

United Church of Canada Outdoor Ministries

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January 2021



SACRED PLAYGROUNDS

Supporting camps and congregations through research and training

About this Report:

The founders of Outdoor Ministries Connection (OMC) committed themselves to research as one of several ministry priorities. The first director survey was conducted in 2014 as part of a grant-funded research initiative called The Confirmation Project. Focused almost exclusively on summer camp ministries, this survey included four OMC member organizations. Following the success of this initial survey and hoping to establish a benchmark survey of Mainline Christian camp and retreat ministries, OMC funded follow-up surveys in 2016 and 2018, including all of its member organizations and expanding the survey to include items related to conferences and retreats. The 2020 survey represents the fourth bi-annual survey of Mainline camp and retreat ministries. With data from 4 surveys over a span of 7 years, we can observe trends in the data.

The 2020 survey took place in the midst of the COVID-19 pandemic. As such, it was highly modified from previous years to include data specific to the pandemic. It typically took a director 30 minutes to complete and had a completion rate of 91%. Participating organizations comprise nearly 700 individual ministry centers, and 376 were represented in the 321 survey responses, for a response rate of approximately 54%.

This report is divided into 6 parts, with parts 2 and 3 focused on new items directly related to the COVID-19 pandemic. In some cases, survey items were combined to provide a more concise picture of certain aspects of camp and retreat ministries. These indices and other survey items include written interpretation and comparison with previous years of the survey in order to observe trends.

How to use this Report:

Share survey findings with your organization's camp directors...

Discuss key survey findings with your ministry center's staff or board of directors...

Compare your site's philosophy and statistical data with the larger camping network...

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Report Highlights and Findings Summary

The below findings are not meant to be exhaustive but, rather, to highlight some of the survey findings that the researcher considered interesting or remarkable.

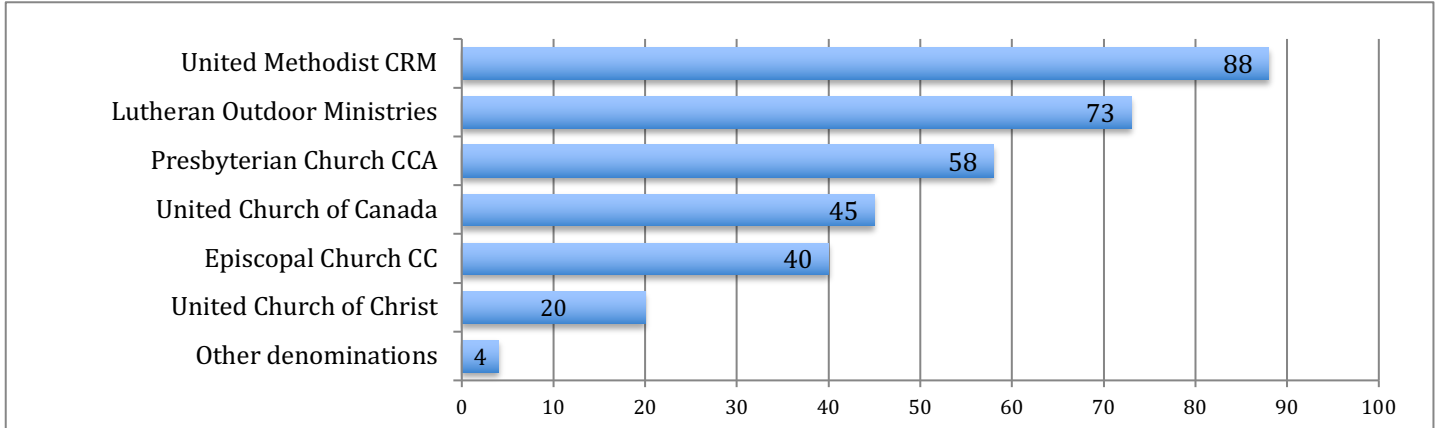
1. The 2020 survey changed the method of data collection from previous years, allowing for one response per organization rather than one from each site. The number of responses (321) is the highest since 2014, and the number of individual sites represented (376) is the highest ever, making this the **broadest ever representation of Mainline Christian outdoor ministries**.
2. **The COVID-19 pandemic** dominated director attention in 2020, impacting nearly every aspect of outdoor ministry operations. Most significantly, guest numbers plummeted in both summer camp and retreat/conference operations (Tables 2, 9, and 10). 82% of summer camps had their lowest enrollment in at least the last 5 years, and 86% of retreat operations indicated the same. Extrapolating the numbers in comparison with 2019, 330,000 overnight campers, 30,000 day campers, and 13,000 summer staff missed out on summer camp in 2020 across the 700+ outdoor ministry sites of OMC.
3. **Prior to the pandemic**, outdoor ministry operations were steadily growing in terms of summer campers and retreat guests, continuing the trend from the preceding years (Tables 9 and 10). These trends coincided with steadily rising summer camp fees and staff salaries (Fig. 19), both of which rose more than the rate of inflation from 2014-2020.
4. **Financial impacts:** Program cancelation resulted in a net loss of more than \$260 million in revenue across OMC organizations.
5. **Work force impacts:** The pandemic had a dramatic effect on outdoor ministry staff. Half of all year-round staff members were furloughed, laid off, or had their salaries reduced in 2020. Across OMC, seasonal summer staff were cut by 75% and seasonal retreat staff by 80% (p. 11).
6. Many outdoor ministry organizations found ways to operate on-site programs in 2020, particularly in the United States (Fig. 8). These organizations adopted numerous new **safety precautions** for staff and guests (Fig. 14-16). Only 3 organizations reported more than 3 confirmed COVID-19 cases, and 92% of those operating had no confirmed cases (Fig. 17).
7. **Fundraising revenue was generally up in 2020**, with 71% of all respondents saying they raised more than the previous year, including more than half raising over 10% more (Fig. 10). Open-ended comments indicated that many organizations had special campaigns or new initiatives (particularly online) to raise the additional funds (pp. 14-15). Additionally, most camps received government assistance or loans to help cover their expenses (Fig. 11).
8. In the midst of the pandemic, there remained **hope and optimism** among outdoor ministry leaders. Many were forced to innovate, resulting in new programs and initiatives that they planned to carry forward after the pandemic. The most prevalent among these were increased opportunities for family camps/retreats, new virtual options to connect with constituents, and a shift toward decentralized programming featuring smaller groups and modified food service (pp. 14-15). As of January, most had **not yet decided** about summer camp 2021 (Fig. 12), but most remained optimistic about their ministry's long-term survival (Fig. 13).
9. The trend continued **away from strong congregational connection** and away from specific faith emphasis (pp. 7, 27-28). For the first time, Type 2 ministries were the most prevalent (Fig. 6), indicating a moderation of faith emphasis and congregational connection. The pandemic impacted congregational partnerships in numerous ways, doubtless skewing the ministry classification. It remains to be seen if connection to congregational ministries will rebound after the pandemic.

Part 1: General Camp and Retreat Center Statistics:

321 Outdoor Ministry organizations responded to the survey, representing **376 ministry sites**

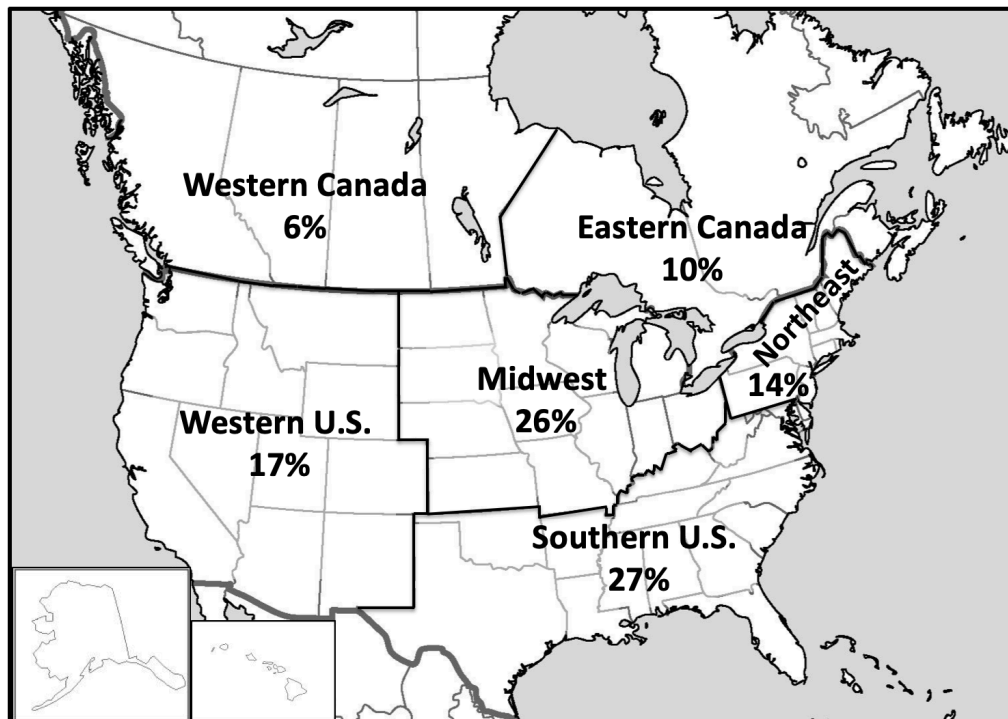
- They represented 46 U.S. states and 11 Canadian provinces and territories

Figure 1: # Responding Outdoor Ministry Organizations, by Affiliation



- The question format changed in 2020, allowing multi-site organizations to respond on behalf of all of their sites, even if these sites offered unique programming. In previous years, each site with unique programs and leadership staff was asked to complete a separate survey. For example, Lutheran Outdoor Ministries (LOM) had 73 responses in 2020, representing 106 individual sites. All 321 responses represented 376 individual ministry sites.

Figure 2: Percentage of Responding Ministries, by Region, n=321

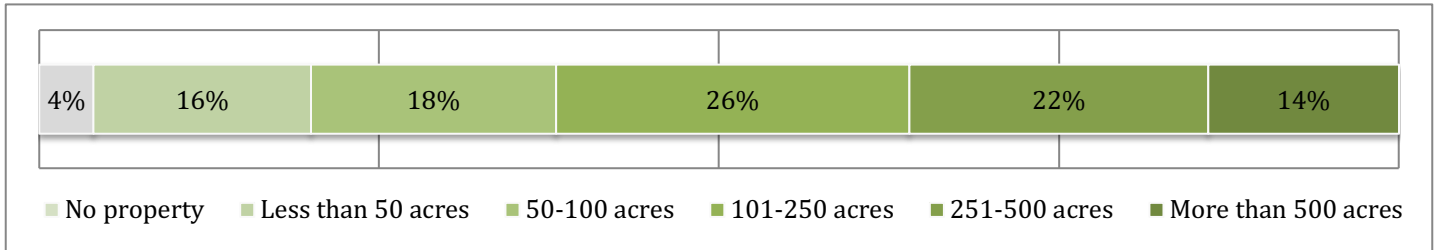


- Canadian camps had the highest representation of any year in the survey so far (11% in 2018)

General Ministry Site Overview:

- 68% Combination of summer camping (child, youth, and/or family camp) and year-round retreats/conferences
- 22% Primarily youth/child camping
- 7% Primarily user groups and rentals
- 3% Primarily adult conferences and retreats

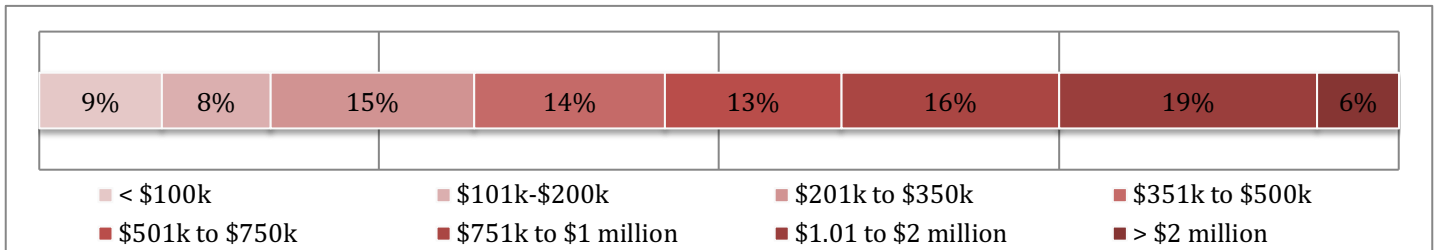
Figure 3: Property Size, in Acres, n=298



- 4% did not own or lease any property
- 62% had more than 100 acres of property
- The average individual site was 232 acres

Budget:

Figure 4: Annual Operating Budget in 2020, Prior to the Pandemic, n=319



OMC budgets varied widely in 2020, with about a third of camps having annual budgets less than \$350,000, and a quarter with budgets over \$1 million (including some with budgets over \$4 million). The survey asked for annual budgets prior to the pandemic in order to assess the impact of the pandemic on outdoor ministries of various sizes.

Full-time Employment (prior to the pandemic):

- 13% had no full-time staff members
- 15% employed 1 full-time staff member
- 23% employed 2-3
- 17% employed 4-5
- 19% employed 6-10
- 13% employed 11 or more

Employment Summary *(including full-time and part-time staff):*

- 12% of outdoor ministries operated with only one paid staff person or none at all
- A third had 5 or fewer paid staff people
- Another third had between 6 and 13 paid staff members
- The remaining third had more than 13 paid staff members

Accreditation:

- 54% of US ministries were accredited through the American Camp Association (ACA)
- 19% were members of the Christian Camp and Conference Association (CCCA)

Level of Involvement among Congregational Leaders/Clergy

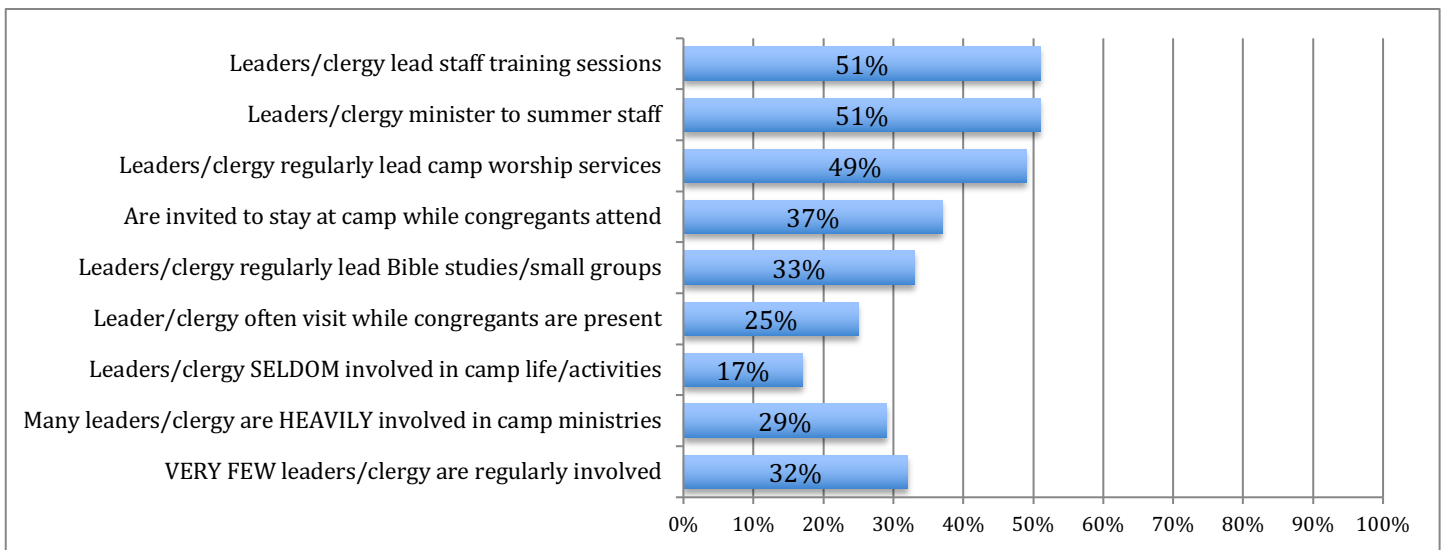


Figure 5: % of Camps Indicating Various Ways Clergy Members were Involved, n=282

- Combining the above survey items suggests that 33% of responding ministry centers had a very low level of clergy engagement, 25% had moderate engagement, and 43% had high or very high levels of clergy engagement. This was the lowest average level of reported clergy engagement since the survey began in 2014. It is probable that responses were directly impacted by the pandemic, so it will be important to assess the level of clergy engagement in coming years.

Outdoor Ministry Type:

Based on responses to multiple survey questions, ministry sites were categorized by their connection to congregational ministries/denominational teachings (weak connection, moderately weak, moderately strong, and strong connection) and the emphasis placed on faith/Christian practices (low, moderately high, very high). Combining these two categories reveals four general types of mainline Protestant outdoor ministries:

Type 1: Low faith emphasis, weak connection to congregations/denominational ministries

Type 2: Moderate faith emphasis, moderate connection to congregations/denominations

Type 3: High faith emphasis, weak connection to congregations/denominations

Type 4: High faith emphasis, strong connection to congregations/denominations

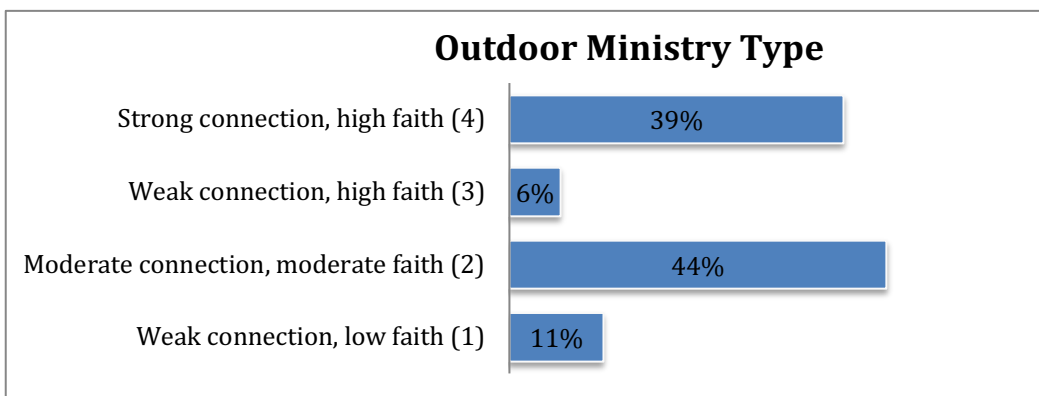


Figure 6: Prevalence of Outdoor Ministry Type, $n=319$

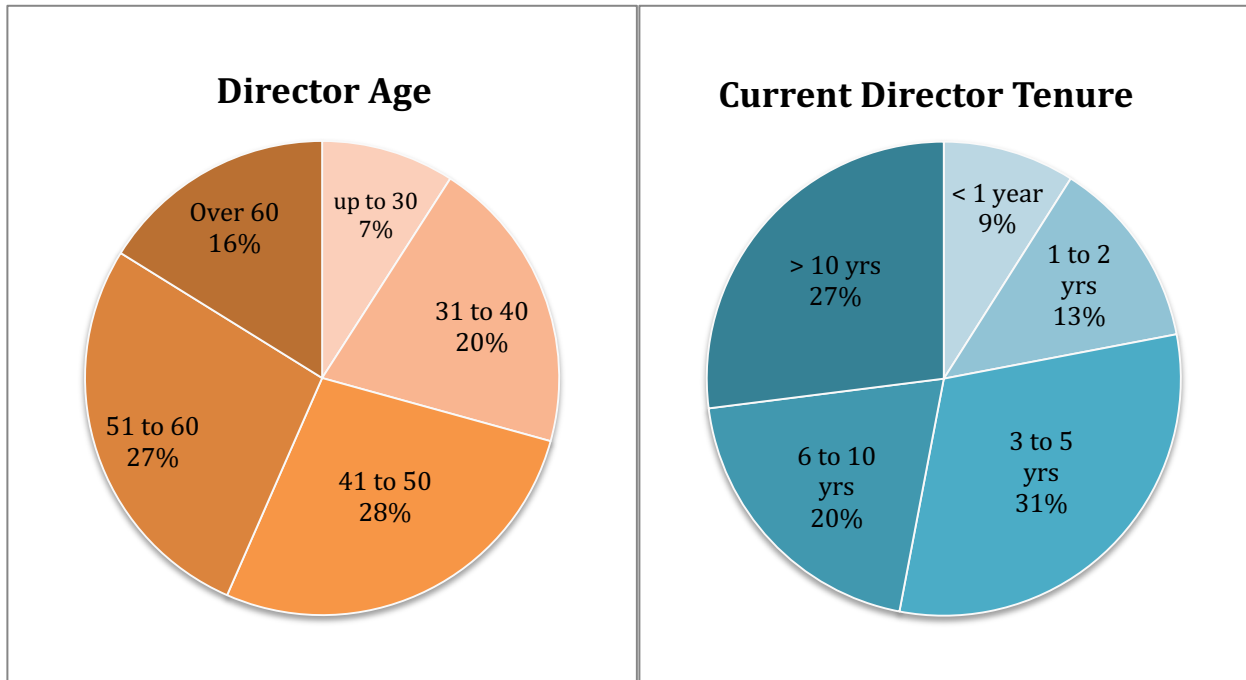
The trend continued towards lower faith emphasis among outdoor ministries that had weak or moderately weak connections to their congregations and denominational bodies (first noted in 2018 survey). It is possible that the generally weaker points of connection to congregational ministries were related to the COVID-19 pandemic, particularly those related to clergy engagement (see Fig. 5).

- The percentage of camps having a strong connection to congregational ministries and high faith (Type 4 Ministries) dropped below 40% for the first time in the survey.
- The % of ministries comprising Type 1 and Type 2 ministries has grown steadily each round of survey administration. The combined percentage of these two types grew from under 30% in 2014 to 33% in 2016, 44% in 2018, and 55% in 2020.
- Type 3 ministries continued their sharp decline, suggesting again that ministry centers with a weak connection to congregational ministries and denominational teachings are at risk of losing their high faith emphasis over time.
- Most prominent ministry type by region: **Northeast:** Type 2, **Midwest:** Type 4, **South:** Type 2, **West:** Type 2, **Canada:** Type 2.
- There were clear differences between U.S. ministries and Canadian ministries. In the U.S., Type 4 ministries remained the most prevalent (45%), followed closely by Type 2 (42%). In Canada, Type 2 ministries were the most prevalent (51%), followed by Type 1 (38%). This suggests a significant difference in faith emphasis between the two countries.

Camp and Retreat Center Directors

- 98% were white
- 36% were female
 - The proportion of female camp directors has increased slowly but steadily since the survey began: 26% in 2014, 32% in 2016, 35% in 2018.
- Education level: 12% did not have a bachelor’s degree, 50% had a bachelor’s degree, 38% had a master’s degree or doctorate
- 38% had a theological degree or certification at some level, including 20% with an M.Div
- 33% had received no formal theological education

Figure 7: Director Age and Tenure, n=294



- Director turnover evident in the 2016 and 2018 surveys slowed considerably in 2020, likely related to the pandemic. Only 22% of directors had been in their positions for under 3 years, compared with 31% in 2018 and 27% in 2016. Director age was correspondingly higher in 2020.

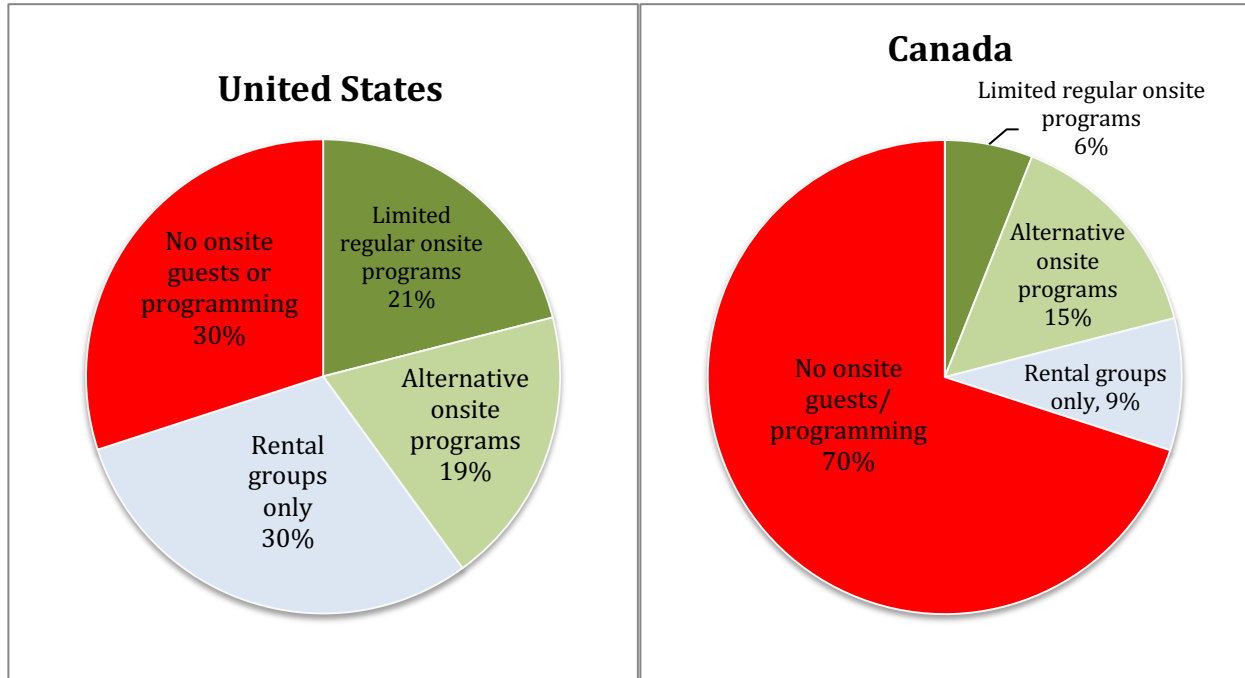
Table 1: Director Demographics, by Annual Budget Categories

	< \$200k	\$201k-\$500k	\$500k-\$1 mil	>\$1 million
Male director	39%	61%	71%	74%
Bachelor’s degree or higher	72%	87%	91%	93%
Theological degree (any) or certification	32%	45%	33%	41%
Tenure of more than 5 years	35%	38%	59%	50%
Age over 40	41%	60%	81%	89%

Part 2: Impacts of COVID-19 Pandemic

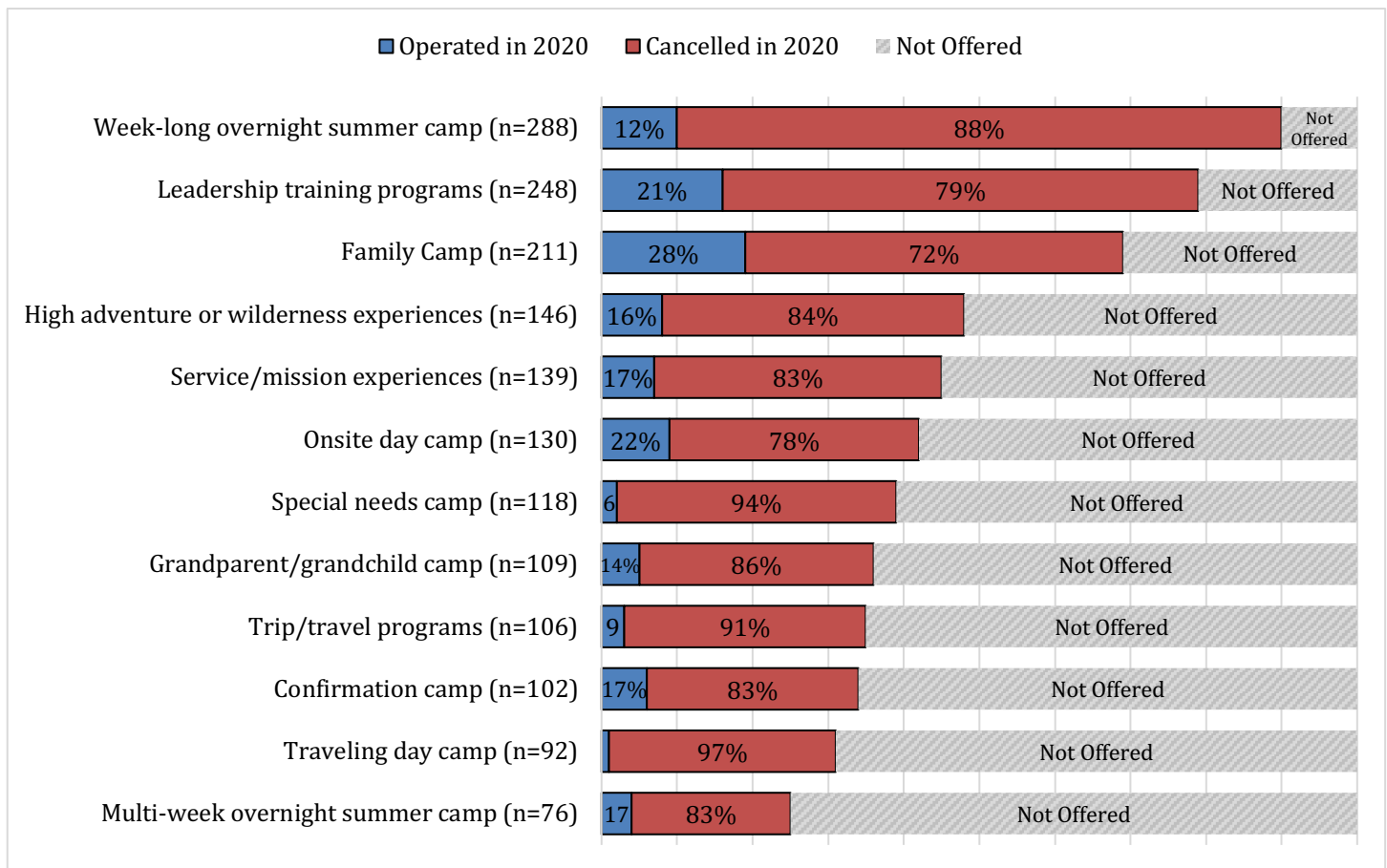
The COVID-19 outbreak was officially designated a global pandemic on March 11, 2020. By the middle of the following week, schools across the United States were closed and summer camps were left to determine how to respond, since summer camp registration and staff hiring were well underway. State, provincial, and local health departments forced the closure of many summer camps and retreat centers, while others were left to make choices on their own as to what, if any, programs they would offer.

Figure 8: Onsite Programming Summary in Summer 2020



- Onsite programming varied remarkably between the United States and Canada. While 70% of Canadian ministry centers were completely closed for onsite programming in summer 2020, the same was true for only 30% of U.S. ministries. Almost a quarter of U.S. ministries proceeded with regular summer camp programming, though on a limited or modified basis.
- While the percentages in Eastern and Western Canada were almost identical, there was wide variation across the regions of the U.S. While 63% of camps in the Pacific West region were closed to onsite guests, the same was true for only about a quarter of camps in the Midwest and South. About half of camps in New England were entirely closed, with most of the others offering alternative programming. Almost a third of camps in the Southern U.S. (29.5%) were open for regularly scheduled onsite programming.

Figure 9: Summer Programs Offered and Cancelled in 2020



- The above figure seeks to capture the impacts of COVID-19 cancellations on summer camp programming. The percentages represent only those ministry sites that normally operate each respective program. For example, 90% of responding outdoor ministries usually offer week-long overnight summer camp programs, and of these, 88% were cancelled in 2020.
- The hardest hit programs in 2020 were the specialty programs of traveling day camp and programs for children or adults with special needs. Well over 90% of all camps with active programs cancelled them in 2020.
- Programs that had the lowest rate of cancellation in 2020 were onsite day camp and family camp programs. Nevertheless, around three-quarters of these programs were cancelled in 2020.

Table 2: Overall Summer Camp Number Change 2019-2020

	# camps	2019 Total	2020 Total	Percent change
Overnight summer campers	270	182,847	18,410	↓ 90%
Day campers	104	20,515	5,371	↓ 74%
Family campers	174	21,774	11,006	↓ 49%
Summer staff	271	8,679	2,207	↓ 75%

Staff Impacts

Table 3: COVID-19 Impacts on Year-Round Staff, by Annual Budget Categories

	< \$200k	\$201k- \$500k	\$500k- \$1 mil.	> \$1 million	All Sites
Avg. # full-time staff pre-COVID-19	< 1	2	5	15	6
Furloughed full-time staff	9%	19%	26%	32%	24%
Laid off full-time staff	5%	13%	33%	50%	29%
Reduced salary of full-time staff	9%	17%	26%	47%	28%
One of above to at least one full-time staff	23%	33%	51%	71%	49%
Avg. # part-time staff pre-COVID-19	5	6	6	16	8
Furloughed part-time staff	10%	27%	41%	49%	36%
Laid off part-time staff	33%	23%	31%	43%	32%
Reduced salary of part-time staff	13%	23%	22%	18%	20%
One of above to at least one part-time staff	46%	53%	69%	74%	63%

- Half of all responding outdoor ministries (49%) had to furlough, lay off, or reduce the salary of full-time staff members. Almost two-thirds (63%) had to do the same to part-time staff members.
- A third of ministry centers had to furlough, lay off, or reduce the salary of at least half of their full-time staff, and half had to do the same to their part-time staff. Every full-time staff member was impacted at 20% of ministry centers and every part-time staff at a third of all ministry centers.
- Large ministry centers were disproportionately affected due to their larger overall staff numbers. While three-quarters of larger ministries (budgets greater than \$1 million) had to reduce staff, the same was true for about half of smaller ministries (budgets \$500,000 or less).
- 20% of all Executive Directors took a reduction in salary, with the majority having their salary reduced by 10% to 25%. Some had their salaries reduced by half or more.
- Responding ministry centers indicated employing a total of 1873 full-time and 2596 part-time staff prior to the pandemic. A total of 2,286 of these staff members (51%) were furloughed, laid off, or had their salaries reduced as a result of the pandemic.
- **Full-time, year-round staff (n=1873):**
 - 15% were furloughed
 - 15% were laid off
 - 21% had their salaries reduced
 - 49% experienced at least one of these
- **Part-time, year-round staff (n=2596):**
 - 24% were furloughed
 - 24% were laid off
 - 10% had their salaries reduced
 - 53% experienced at least one of these
- Of the 280 full-time staff that were laid off, 71% worked at large ministries (budget > \$1 million)

Financial Impact

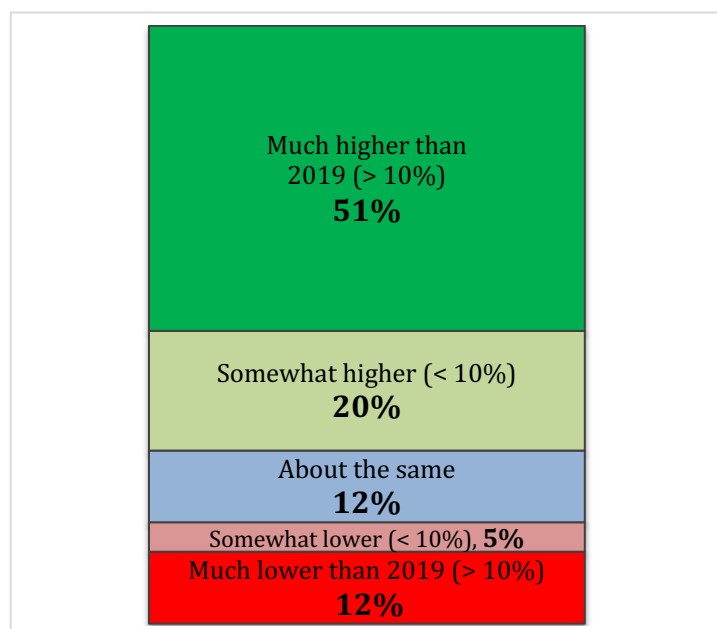
Responding ministry centers reported a combined total of more than \$130 million in lost revenue. The largest ministry centers each reported more than \$4 million in lost revenue.

Table 4: Avg. Lost Revenue, by Budget Category

	Avg. Lost Revenue
Budget: under \$200,000	\$66,493
Budget: \$200k to \$500k	\$207,228
Budget: \$501k to \$1 million	\$377,054
Budget: \$1.01 to \$2 million	\$1,425,625
Budget: over \$2 million	\$2,868,000

75% of respondents indicated having unbudgeted expenses related to COVID-19 mitigation. A third of these were minimal (under \$1,000), with another third \$1,000-\$2,900, and the final third \$3,000 or more. The average expenditure was just over \$4,000.

Figure 10: Revenue from Fundraising and Donations, in Comparison with Previous Year, n=296

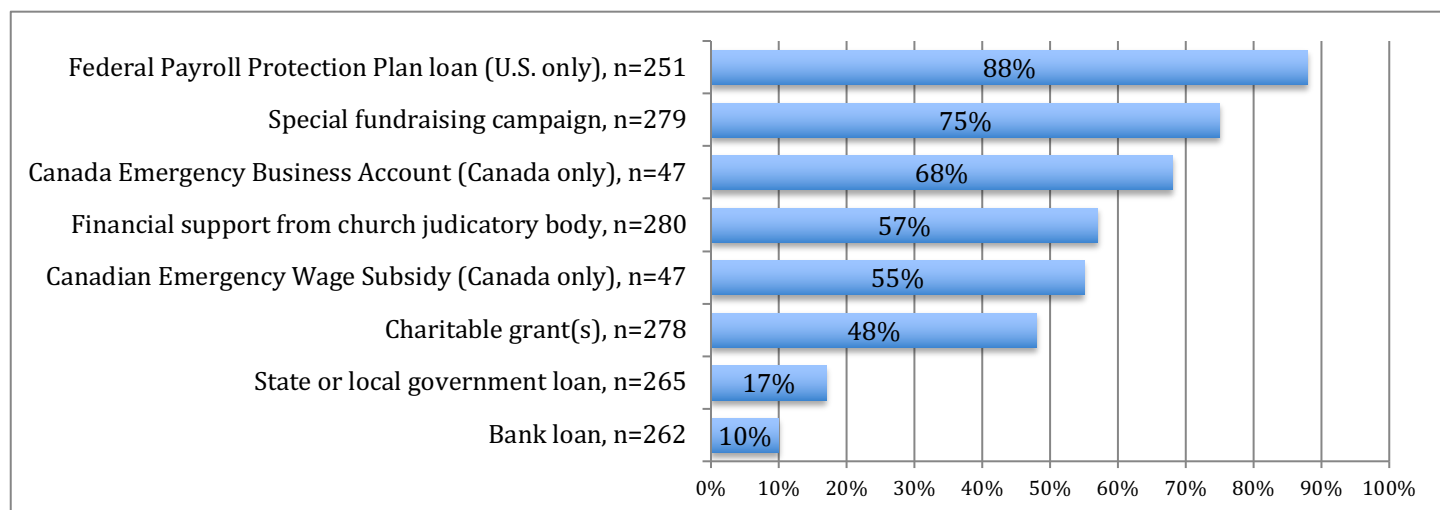


Fundraising was up remarkably in 2020. 71% of respondents said their revenue from fundraising and donations was higher than in the previous fiscal year, including over half (51%) indicating more than a 10% increase. An increase was most prevalent among larger budget ministries.

Table 5: % Reporting Increased Fundraising Revenue, by Annual Budget Category

	Higher than 2019
Budget: under \$200,000	39%
Budget: \$200k to \$500k	74%
Budget: \$501k to \$1 million	78%
Budget: \$1.01 to \$2 million	78%
Budget: over \$2 million	82%
All Ministry Centers	71%

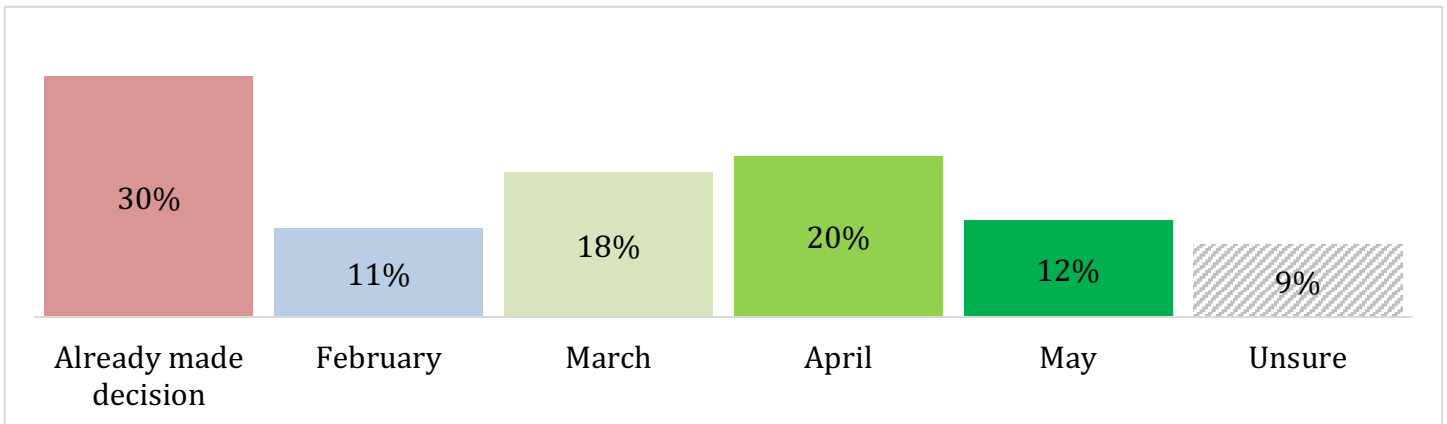
Figure 11: Percent of Ministry Centers Receiving Various Financial Assistance in Response to COVID-19 Pandemic



Future Projections

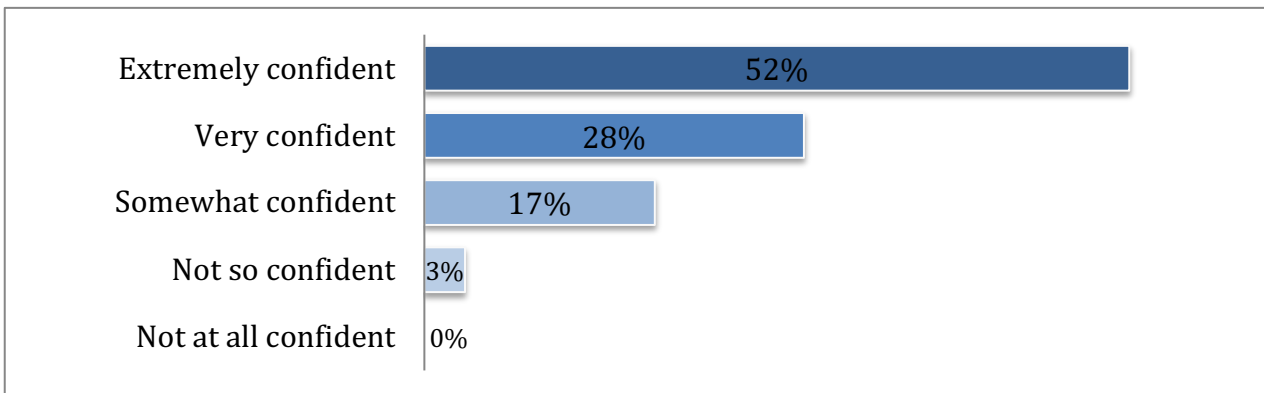
Respondents were asked when they intended to make a final decision for programming in summer 2021.

Figure 12: Projected Timing for Final Decision on Summer Camp 2021, n=293



- Half of respondents intended to put off a final decision until March 1 or later.
- Many of those who had an intended date to make the decision were still open to the possibility of changing the decision based on public health guidelines. Many camps (9%) felt that they did not have enough information to even say when they would be able to make a final decision.

Figure 13: Director Confidence that Ministry Center will be Operating in 2 Years, n=305



Camper/Guest Engagement Successes and Permanent Changes

Participants were asked two open-ended questions about pandemic-related changes in their operations. The first asked about the most successful ways the ministry center was able to engage campers, guests, or constituents during the COVID-19 pandemic. The second asked what changes they thought would likely be permanent. The first question had 256 responses, which were overwhelmingly positive. Many described highly creative alternatives to their regular camp programming, some specific to their unique contexts. The most common success stories involved some sort of virtual engagement, which included things such as virtual camp programs complete with cabin groups/counselors, virtual campfires offered live, increased social media engagement, and websites improved with more interactive content. Many indicated that they offered the virtual content for free. The most common in-person success stories involved family engagement or new family camp programs offered in lieu of traditional summer camp. Other common success stories included drive-through experiences at camp, care packages or camp-in-a-box sent directly to constituents' homes, and successful new fundraising endeavors.

The second question had 225 responses. About a quarter of respondents indicated that they were unsure or that there would be no permanent changes (including some that said they hoped things would simply go back to normal). The remainder indicated specific changes that they foresaw. Most of these were directly related to the success stories shared in the previous question. The below summary offers a glimpse of the most successful alternative programs and how these will affect outdoor ministries in the coming years.

Virtual/On-line engagement (27%): Over a quarter of respondents said that their increased engagement in online media would continue after the pandemic. Most frequently (13%), they said that they intended to continue some form of virtual programming. These programs were most often supplemental to onsite programs, like ongoing engagement with campers or offering virtual camp to those unable to attend in-person. Others indicated that they would offer virtual retreats or other engagement opportunities throughout the year. In addition to virtual programming, respondents said that they would continue an expanded online presence (through social media, for example) or continue having board meetings online.

Program Expansion (20%): These respondents indicated that they intended to continue one or more in-person programs started during the pandemic. Many of these were offered as alternatives to their normal camp or retreat programs. Half of these new programs consisted of options focused on families, including family retreats, family camp, and weekend cabin usage during the summer.

Health/Safety Protocols (19%): Many respondents indicated that new health, safety, and sanitation protocols adopted during the pandemic would continue indefinitely. These included cleaning/sanitation protocols, written guidelines for participant health, and specific practices like wearing masks or temperature checks.

Staff Reduction or Restructuring (12%): These respondents indicated that they were forced to eliminate staff positions or restructure their staffing in response to the pandemic. Some indicated that these changes were positive staffing restructures, though most lamented the need to reduce staff.

Camper Check-in Procedures (11%): Summer camps were forced to overhaul their camper registration and check-in process during the pandemic, and many indicated that some of the changes would become permanent. In particular, camper health screening will be more common and the camper check-in process will be more intentionally planned at many camps.

Programmatic Changes (10%): Many camps adopted programmatic changes in response to the pandemic that they indicated had positive results. Many of these included increased time spent outside during summer camp programs. Others indicated stronger focus on small group ministries rather than being together in large groups. Few camps indicated that program elimination would become permanent, though this was a reality for some.

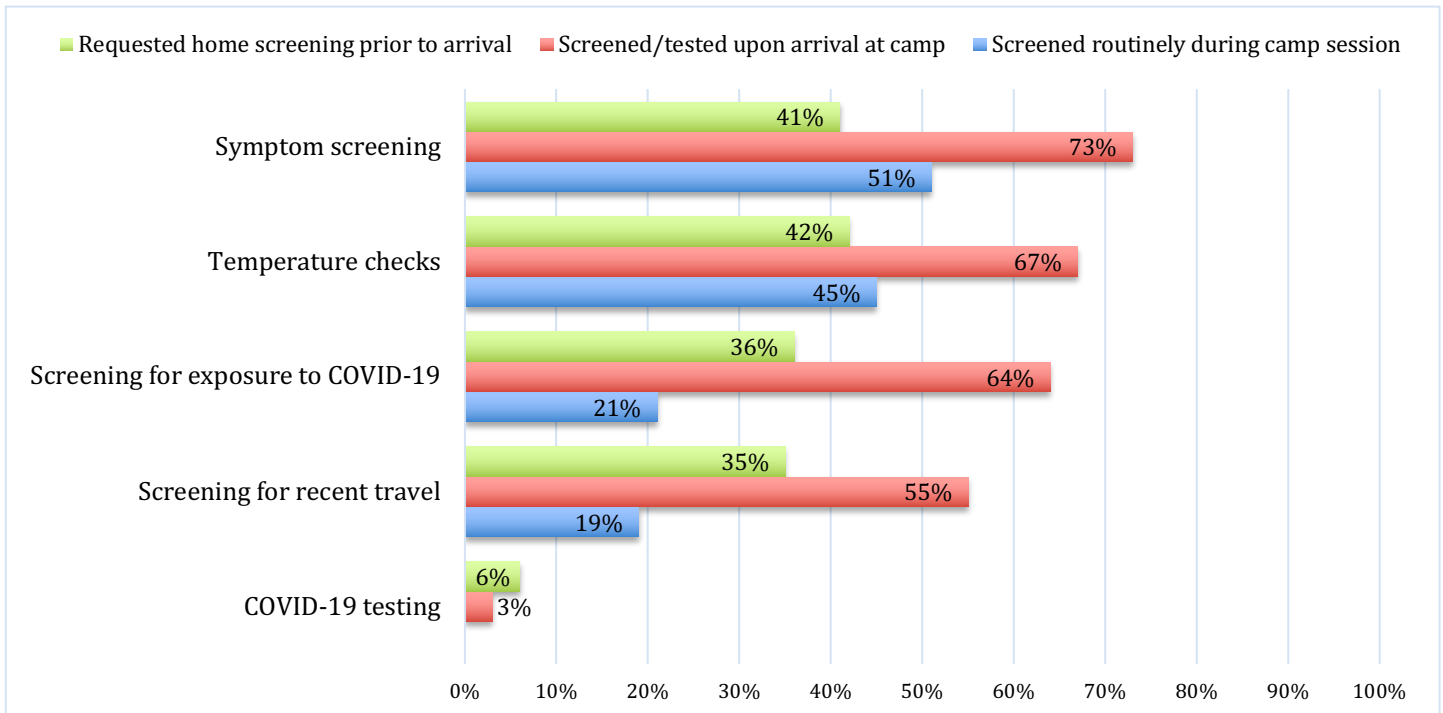
New Fundraising Ventures (7%): Since the pandemic resulted in decreased revenue, some ministries experimented with new fundraising ventures. Many of these were successful enough to carry forward in future years. The majority of new fundraising ventures included an online or virtual component.

Food Service Procedures (7%): Many centers were forced to adjust their food service procedures to limit potential exposure to COVID-19. Some indicated that they would use the opportunity to modify permanently their food service. The most common themes included a decreased emphasis on large group dining hall food service in favor of more meals outside and more meals served in small groups or family style.

Camp-in-a-Box (4%): In addition to virtual camp programs, many camps sent physical tokens of the camp experience to the homes of registered campers. Many intended to keep some form of this practice, whether for young people unable to attend camp in person or as a way of supplementing the on camp experience with physical mementos before and/or after camp.

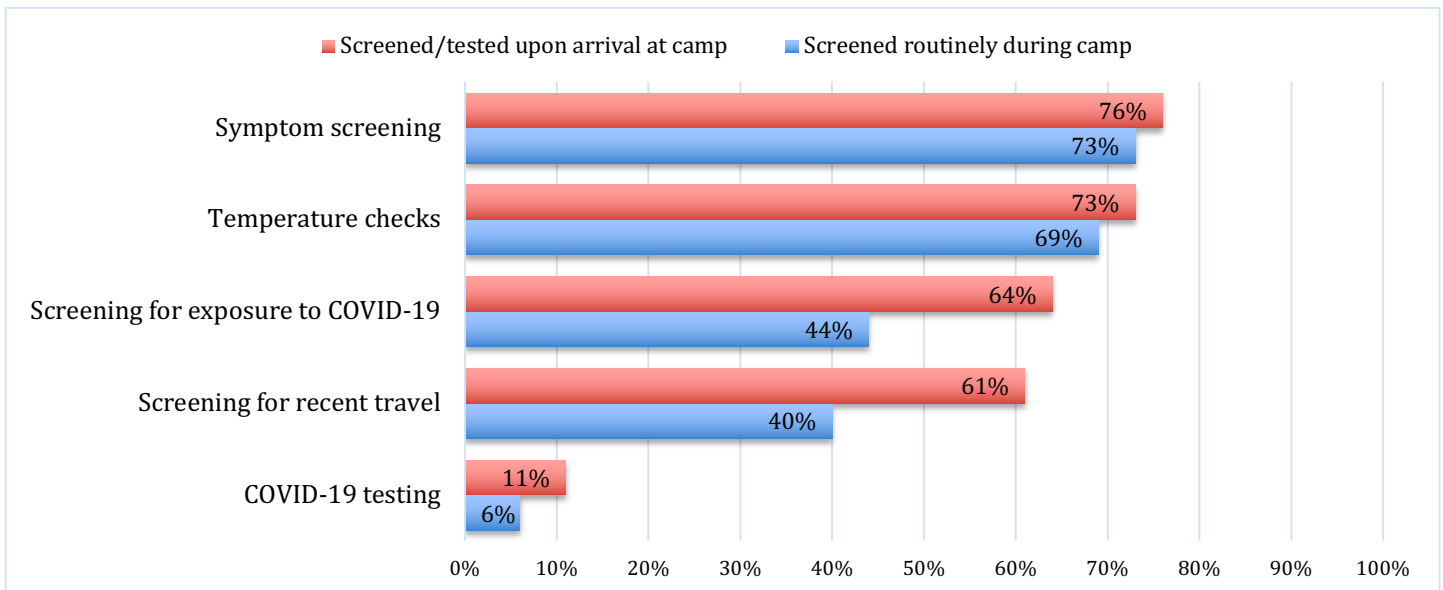
Part 3: COVID-19 Mitigation Strategies

Figure 14: Prevalence of Camper Screening for COVID-19 in Summer 2020, n=101



- Screening strategies varied considerably based on the level of programming. Camps that were only open for user groups did far less screening than those that ran some sort of regular camper programs. Those offering regular camper programs were most likely to have camper arrival protocols including symptom screening (80%), temperature checks (75%), screening for exposure to COVID-19 (67%), and screening for recent travel (62%).

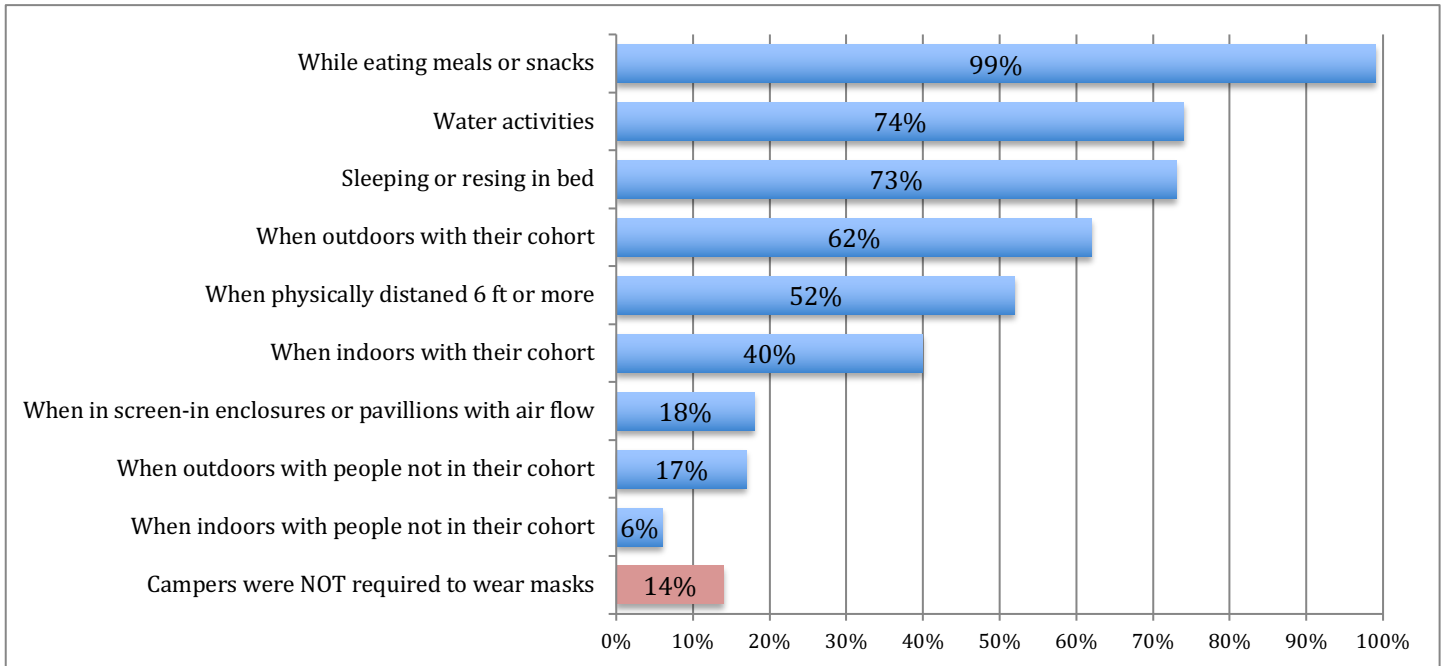
Figure 15: Prevalence of Summer Staff Screening for COVID-19 in Summer 2020, n=103



Masks

According to scientific recommendations available in summer 2020, the most effective methods of preventing COVID-19 while in a group setting were to physically distance (6 feet apart or more), be outside as much as possible, and wear a mask. The vast majority (86%) of camps and retreat centers that offered some form of in-person programming required participants to wear masks. However, mask rules varied based on the different activities. Directors were asked when campers and other guests were allowed to remove their masks.

Figure 16: Percentage of Operating Camps Allowing Campers to Remove Masks During Various Activities, n=95



Confirmed COVID-19 cases (112 ministries with onsite programs)

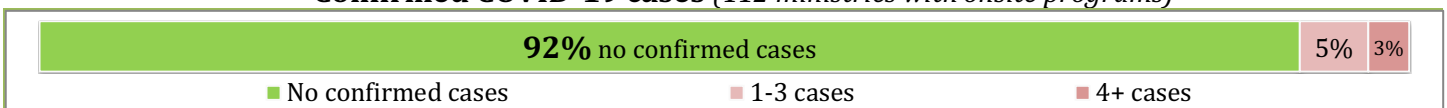


Figure 17: Percentage of Operating Camps with Confirmed Cases of COVID-19, n=112

- Only 3 of the responding camps had more than 3 confirmed COVID-19 cases. There were no discernable patterns among the camps that had confirmed cases in comparison with those that did not. They followed similar mitigation strategies and were spread across multiple states and regions of the country.

Part 4: Summer Camp 2020

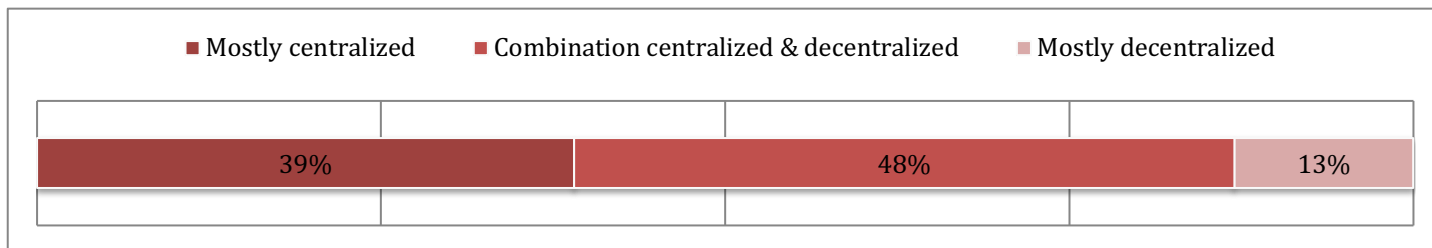
Overall summer program summary (in typical year):

- 56% typically had primarily co-ed residential summer camp for children/youth
- 30% typically ran a combination of traditional summer camp and retreats or other programs
- 5% were primarily retreat centers during the summer
- 5% typically ran day-camp, family camp, or other specialty camp programs
- 4% were primarily rental facilities for outside groups

Weeks of Summer Programming:

Approximately 40% of ministry centers canceled all in-person summer programming in 2020. Of those offering these programs, most greatly reduced their offerings from previous years. The norm among OMC camps in previous years was to offer between 7 and 10 weeks of summer programming (about two-thirds of all camps). Even among those offering summer programs in 2020, a majority (53%) offered 6 or fewer weeks, with only 40% offering the more typical 7-10 weeks.

Figure 18: Centralized v. Decentralized Programing, n=279



Traveling Day Camp:

Some camps offered Traveling Day Camp programs, in which teams of staff members travel offsite to run day camp at a congregation or other setting. Of the 92 camps that offered traveling day camp in 2019, only 4 offered programs in 2020, all operating at reduced capacity. An additional camp operated with an online format.

Family Camp:

Over half of responding camps offered family camp programs in summer 2019. These programs averaged 134 family campers, with the largest programs serving over 500 people. In 2020, more than two-thirds of these family camp programs were canceled. However, many camps offered family camp programs as alternatives to child/youth summer camp. This meant that camps that did not typically offer family camp did so in 2020. It also meant that other camps expanded their family camp programs in 2020. A total of 16% of camps *increased* their numbers of family campers in 2020. This meant that, while more than two-thirds of camps canceled their family camp programs, the total number of family campers served across OMC decreased by less than half (49%).

Average weekly camp fee in U.S.: \$454 USD

- 25% of camps charged more than \$500 for their typical week-long overnight program. At the low end, a quarter of camps charged \$385 or less.

Table 6: Average Weekly Camp Fee, by Geographic Region

Northeast U.S.	Midwest	South U.S.	West U.S.	East Canada	West Canada
\$451	\$430	\$479	\$453	\$457 CAD	\$356 CAD

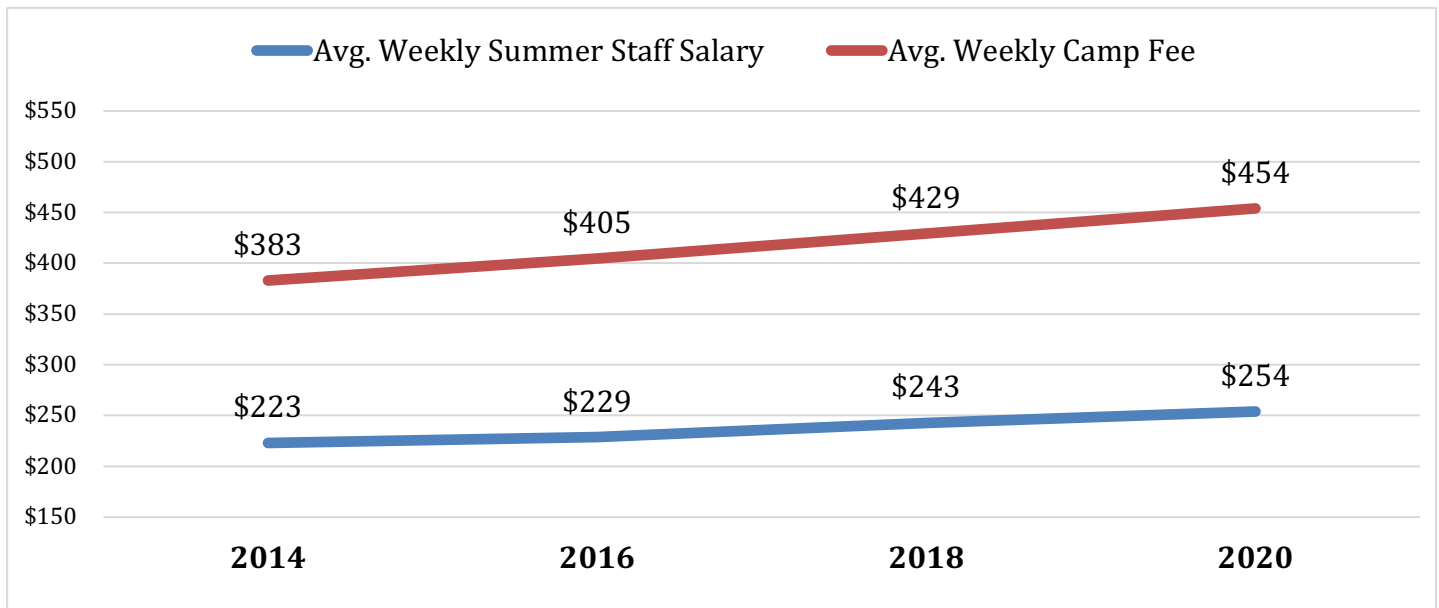
Average weekly summer staff salary: \$254 USD

- A quarter of camps paid summer staff \$300 or more per week. At the low end, a quarter paid less than \$210 per week.

Table 7: Average Weekly Summer Staff Salary, by Geographic Region

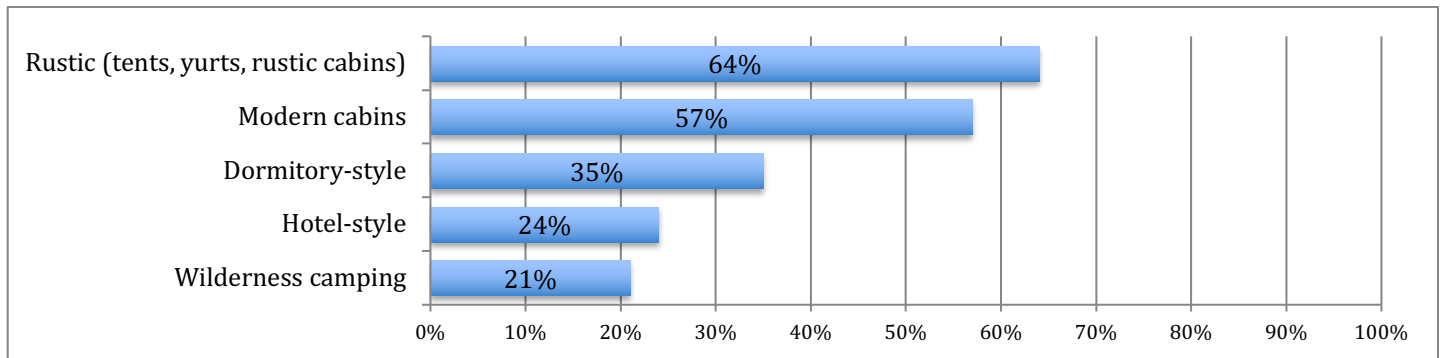
Northeast U.S.	Midwest	South U.S.	West U.S.	East Canada	West Canada
\$238	\$255	\$241	\$287	\$308 CAD	\$523 CAD

Figure 19: Summer Staff Weekly Salary and Weekly Camper Fee Trends in United States 2014-2020



- The average fee for a week of summer camp at an OMC camp in the U.S. rose 18.5% from 2014 to 2020, roughly double the rate of inflation (approximately 9.3% cumulatively). At the same time, the average OMC summer staff weekly salary rose 13.9%.

Figure 20: Summer Housing Accommodations Available (n=291)



Returning Summer Staff (n=255):

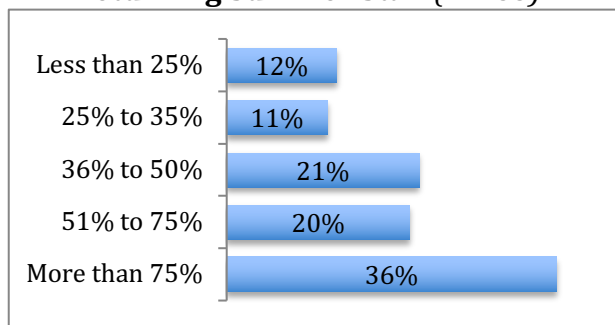


Figure 21: % of Staff Returning from Previous Summers

Camper Diversity (n=96):

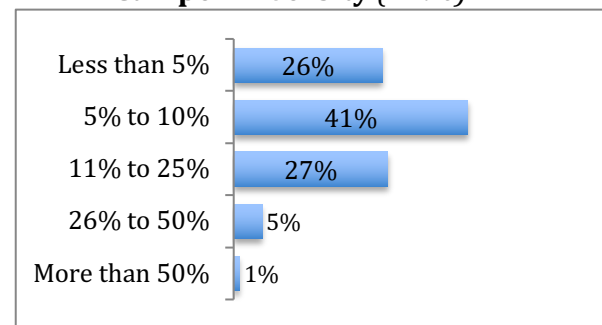
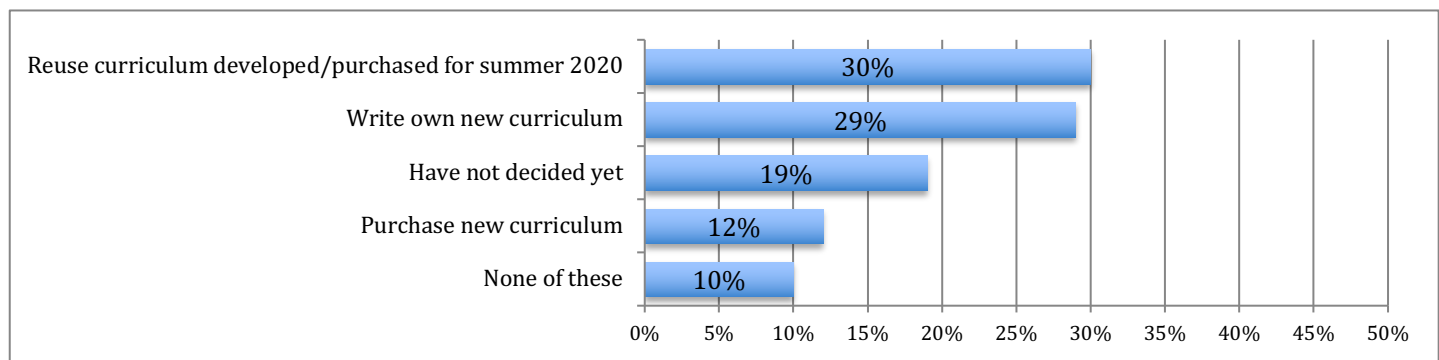


Figure 22: % of Campers representing Racial Minorities

- The drastic changes in summer camp programming meant large changes in summer staff make-up. Most camps greatly reduced the number of staff members they hired. This meant that a large majority of staff who served in summer 2020 were returning staff members. Well over half of all camps that hired summer staff had more than half these staff returning from previous summers (in 2018, the same was true for only a third of camps). Many camps hired exclusively returning staff members. This will likely create a large demographic bubble among camp staff in future years, with a lower percentage of experienced staff members in 2021 and 2022.
- The large changes in summer 2020 did not affect the proportion of summer campers representing racial minorities. These numbers were consistent with previous years of the survey. Though there were far fewer summer campers overall, the lack of access did not disproportionately affect children of color when considering all OMC camps.

Table 8: Percentage of Camps, by Denomination, using Bible Study Curricula

	Inside Out (Chalice)	LOM Curriculum	Wrote our own	Outside Personnel wrote/led	No set Bible study curriculum
ECCC (n=33)	12%	3%	39%	18%	27%
LOM (n=66)	3%	56%	38%	0%	3%
PCCCA (n=48)	48%	6%	44%	2%	0%
UMC-CRM (n=76)	46%	12%	35%	4%	3%
OMA-UCC (n=17)	53%	6%	35%	0%	6%
UC-Canada (n=40)	5%	0%	38%	7%	50%
ALL CAMPS (N=277)	26%	18%	39%	5%	12%

Figure 23: Plans for Bible Study Curriculum in 2021, n=277

- Of the users of the InsideOut curriculum, 48% planned to use what they purchased in 2020 and 31% planned to purchase a new curriculum, with the rest undecided.
- Of the users of the LOM curriculum, 63% planned to use what they purchased in 2020 and only 6% planned to purchase a new curriculum, with the rest undecided or planning to write their own.

Summer Camp Enrollment and Capacity

Summer Camp Capacity:

Reported summer camp capacity was equivalent to previous years, indicating no significant changes in capacity. A third of camps had a capacity of fewer than 100 campers. Another third had a capacity of 100-170, and the remaining third over 170 campers at once. 10% of camps had a capacity of 280 or more.

Table 9: Summer Camp Enrollment Trends, 2014-2020

	2014	2016	2018	2019**	2020
90% capacity or higher	14%	13%	15%	-	4%
75% to 89% capacity	45%	32%	31%	-	3%
50% to 74% capacity	41%*	35%	35%	-	12%
Less than 50% capacity		20%	19%		81%
Enrollment higher than previous summer	45%	45%	44%	-	4%
Enrollment about the same as previous	33%	39%	35%	-	6%
Enrollment lower than previous summer	22%	16%	21%	-	90%
Highest of past 5 summers	-	25%	27%	26%	2%
Higher than most of past 5 summers	-	21%	21%	19%	3%
About the same as past 5 summers	-	34%	30%	40%	6%
Lower than most of past 5 summers	-	13%	17%	11%	7%
Lowest of past 5 summers	-	6%	5%	4%	82%

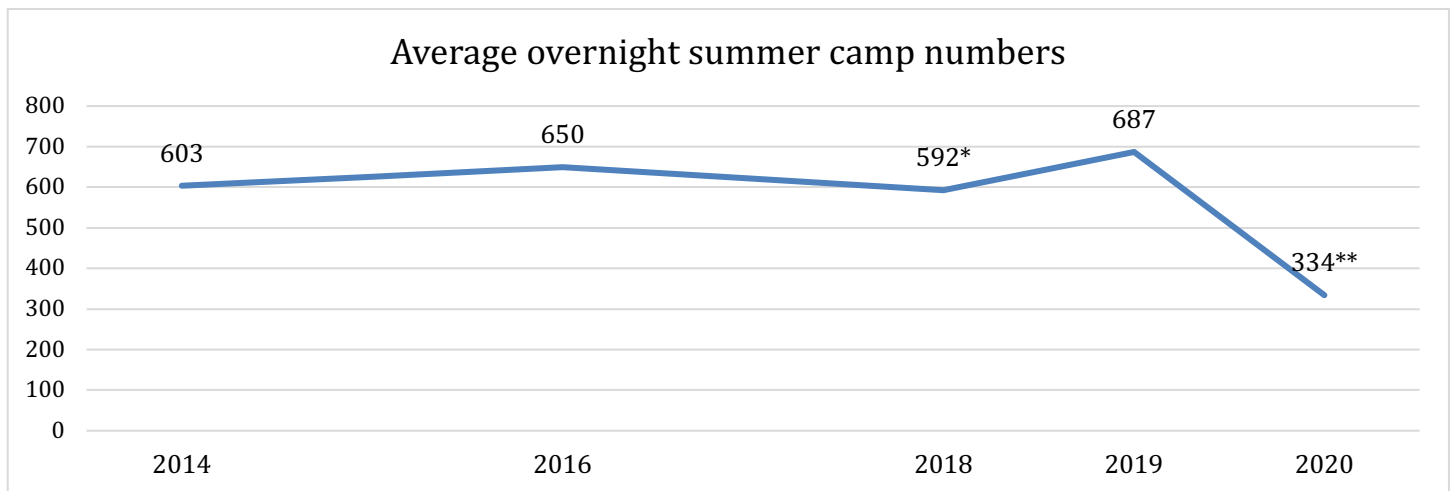
* The 2014 survey did not include the category “less than 50%”; the number represents “less than 75%”

** A single question about 2019 enrollment was included in the 2020 survey

Overnight Camp Attendance:

Summer camp attendance dropped precipitously in 2020, with 8 out of every 9 overnight camper programs canceled. A total of 270 camps provided overnight summer camp numbers for both 2019 and 2020. In 2019, the average number of overnight campers was 687 (up from 592 in 2018 and 650 in 2016). In 2020, the average dropped to 68 campers at these same camps. This is somewhat misleading, since it considers 215 camps that did not serve any campers. Just including the camps that offered overnight camp in 2020, they served an average of 334 campers. In 2019, a quarter of responding camps served 800 or more overnight summer campers. Only 1% did so in 2020.

Figure 24: Average Number of Overnight Summer Campers, 2014-2020



*The drop in average summer camp numbers in 2018 is attributable almost entirely to a drop in Lutheran Outdoor Ministries camps during the year of the triennial ELCA Youth Gathering.

**88% of camps canceled their overnight camp programs in 2020. This number represents only those camps that offered overnight camp programs.

On Site Day Camp Attendance:

Like overnight camp, day camp attendance dropped precipitously in 2020, with about three-quarters of camps canceling their programs. A total of 104 camps with day camp programs served 20,515 campers in 2019 and only 5,371 in 2020, a drop of 74%. In contrast to overnight programs, camps that operated in 2020 averaged only slightly fewer day campers than in 2019. Day camps served an average of 207 campers in 2019 and 185 in 2020.

Virtual Camp:

In response to the pandemic, camps added this new programmatic term to the lexicon in 2020. The survey defined the term: "Many camps chose to offer virtual or distance summer camp programs in response to the COVID-19 pandemic. These programs included registered campers and some form of regular programming." This definition sought to differentiate virtual camp programs from simple videos or social media engagement posted online with little-to-no interaction. Over a third of responding camps (39%) indicated that they offered virtual camp programs in 2020. This included half of all camps that were not open for any onsite programming in 2020. Of the camps that opened for regular programming at reduced capacity, 21% offered virtual programs, as well. Virtual programs were typically small in terms of camper numbers. Two-thirds of camps that offered virtual camp programs reported serving 80 or fewer campers.

Part 5: Retreats and Conferences

Primary clientele for retreats/conferences in typical year:

- 66% Mix of children, youth, adults, and families
- 27% Primarily **adults**
- 7% Primarily **youth/children**

Retreat Accommodations Offered:

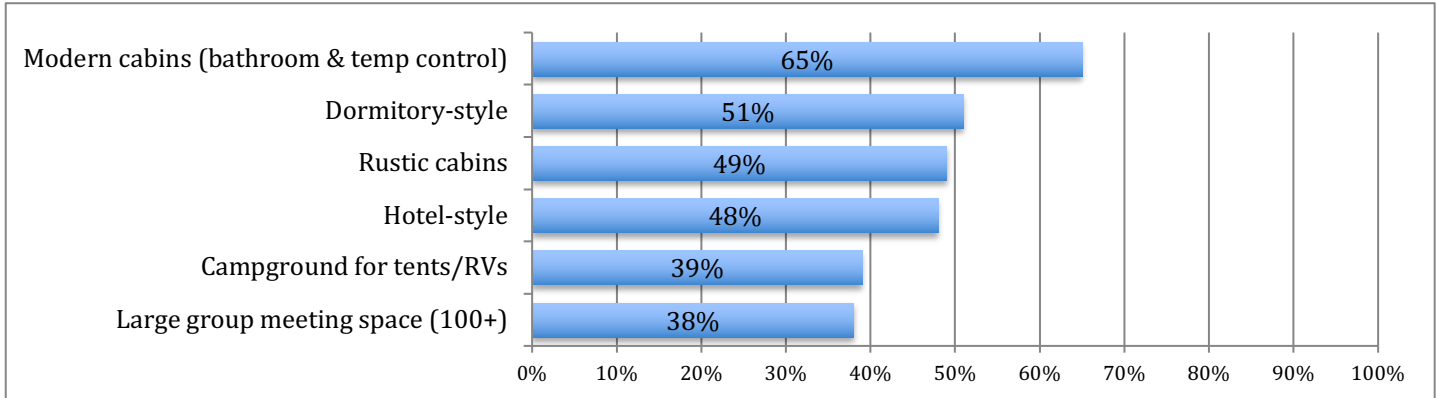


Figure 25: % of Ministries Offering Selected Housing Accommodations for Retreat Participants, n=279

- Well over half of responding camps (60%) offered 3 or more of the above options

Seasonal Retreat Staff:

More than half of ministry centers (59%) hired seasonal staff during the retreat season in 2019. These centers employed an average of 9 seasonal staff members in fall 2019. The situation was very different in fall 2020, when only 28% of ministry centers employed seasonal staff members, averaging less than 4 seasonal staff members each. Total number of staff across all sites declined by more than 80%.

Denominational Affiliation among Retreat Participants:

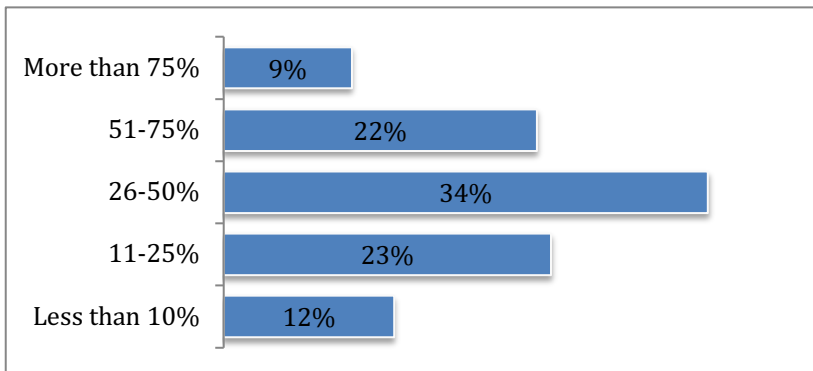


Figure 26: % of Camps Indicating Retreat Participants Affiliated with Constituent Denomination/Congregations, n=266

Overnight capacity for retreats/conferences (out of 275 ministry centers):

A quarter of ministry centers indicated that their overnight retreat capacity was fewer than 80 guests. Another quarter reported a capacity between 80 and 125 guests. Another quarter could accommodate between 126 and 199. The remaining quarter could accommodate 200 or more guests overnight. Average overnight capacity was 161 guests. These figures were roughly equivalent to the 2018 findings, indicating stable retreat capacity.

Table 10: Retreat/Conference Usage Trends

	2016 <i>N=266</i>	2018 <i>N=255</i>	2020 <i>N=276</i>
90% capacity or higher (weekends)	5%	11%	1%
75% to 89% capacity (weekends)	20%	23%	1%
50% to 74% capacity (weekends)	36%	34%	5%
Less than 50% capacity (weekends)	39%	32%	93%
Usage much higher than previous year (> 10%)	44%	9%	1%
Somewhat higher than previous year (< 10%)		37%	1%
About the same as previous year	39%	38%	3%
Somewhat lower than previous year (< 10%)	17%	13%	3%
Usage much lower than previous year (> 10%)		3%	92%
Highest of past 5 years	19%	19%	2%
Higher than most of past 5 years	29%	31%	3%
About the same as past 5 years	38%	37%	4%
Lower than most of past 5 years	12%	11%	6%
Lowest of past 5 years	2%	2%	85%

Figure 27: % Camps offering Selected Retreat Programs, n=268

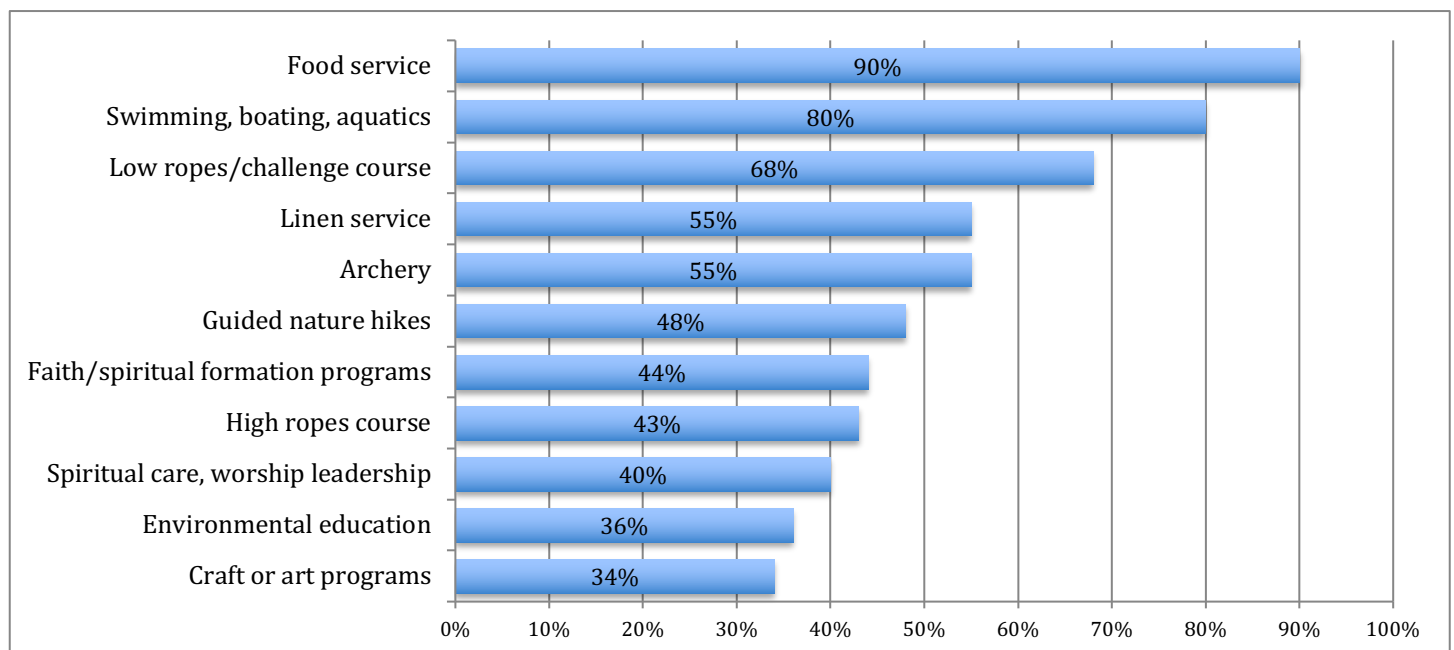
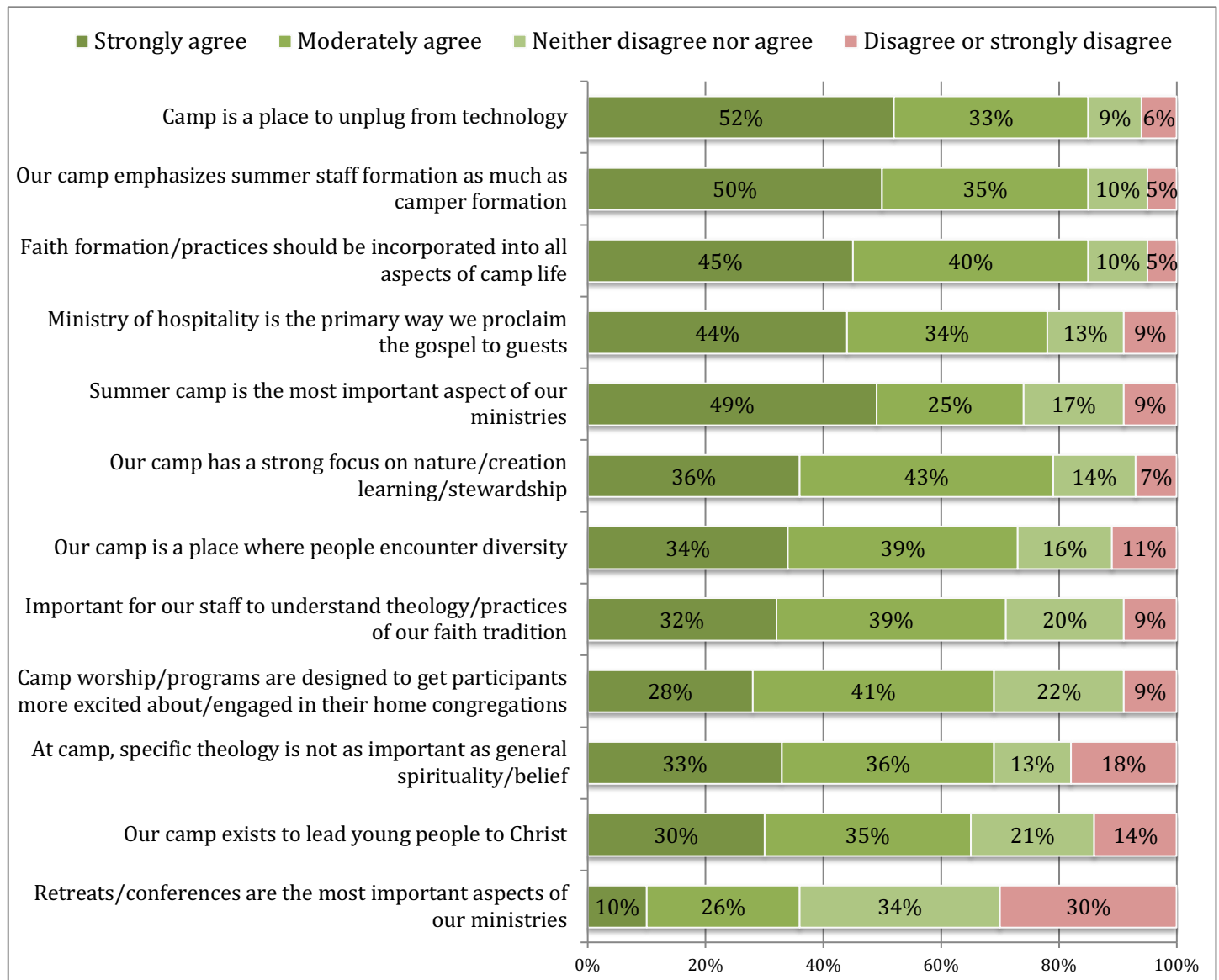


Table 11: Prevalence of Retreat/Conference Center Amenities, by Annual Budget Category

	< \$200k <i>n=40</i>	\$201k- \$500k <i>n=79</i>	\$500k- \$1 mil. <i>n=86</i>	> \$1 million <i>n=74</i>	All Sites <i>N=279</i>
Modern cabins (bathroom and temp. control)	35%	60%	67%	82%	65%
Dormitory-style accommodations	43%	46%	44%	68%	51%
Rustic cabins	68%	56%	42%	41%	49%
Hotel-style accommodations	18%	33%	57%	69%	48%
Campground for tents and RVs	48%	37%	36%	39%	39%
Large group meeting space (groups of 100+)	13%	27%	38%	64%	38%
Food service	65%	91%	92%	100%	90%
Swimming, boating, or other aquatics	56%	79%	79%	93%	80%
Low ropes/challenge course	41%	63%	73%	78%	68%
Linen service	32%	42%	58%	74%	55%
Archery	38%	59%	54%	61%	55%
Guided nature hikes	27%	49%	51%	54%	48%
Faith/spiritual formation programs	29%	40%	41%	58%	44%
High ropes course	3%	32%	51%	64%	43%
Spiritual care and/or worship leadership	32%	33%	38%	53%	40%
Environmental education	24%	30%	41%	42%	36%
Craft or arts program (e.g. pottery)	29%	34%	27%	43%	34%

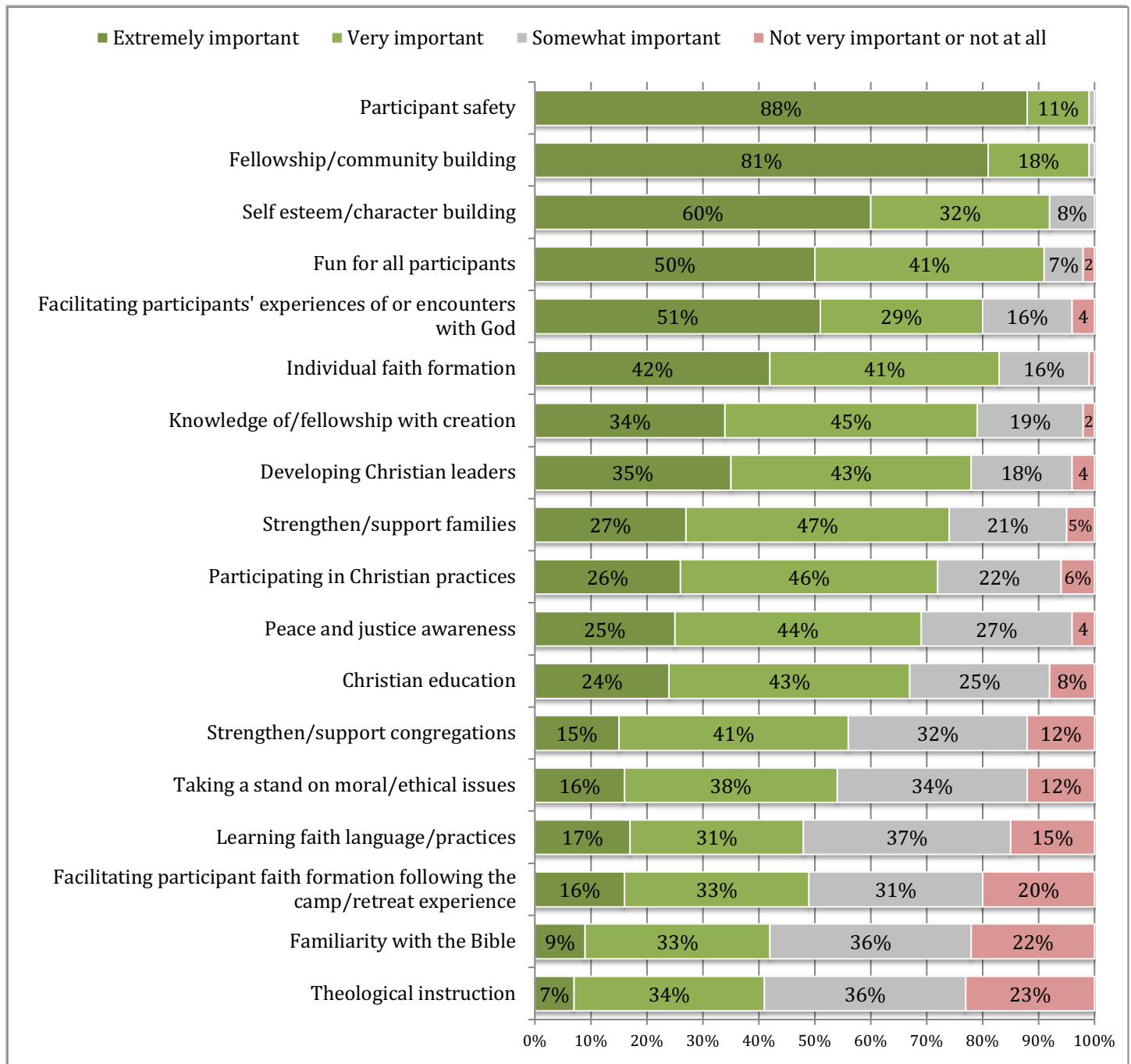
Part 6: Camp and Retreat Center Philosophy

Figure 28: Level of Agreement with Philosophy Statements about Ministry Site (n=291)



- One survey item has shown evidence for a downward trend over the course of the 3 surveys: “Our camp exists to lead young people to Christ.” In 2014, 76% of directors agreed with this statement, compared with 71% in 2016 and 65% in 2018. In the same time, average agreement with “At camp, specific theology is not as important as general spirituality/belief” has increased, indicating an inverse relationship.
- “Our camp has a strong focus on nature/creation learning/stewardship” has shown a steady upward trend in agreement level, from 67% in 2014 to 74% in 2018 and 79% in 2020.

Figure 29: Level of Importance Assigned to Selected Program Priorities (n=290)



- When considering OMC organizations as a whole, respondents have trended slowly but steadily away from specific theology and belief statements since 2014. They have steadily placed less average importance on: Familiarity with the Bible, Individual faith formation, Learning faith language and practices, Strengthen/support congregations, Christian education, Participating in Christian practices, Developing Christian leaders, and Individual faith formation.
- In contrast, there has been a progressive increase in average importance placed on “Peace and justice awareness.”