

american *CAMP* association®

CAMPCOUNTS 2020

Enrollment, Finance, COVID-19 Responses, and Practices



CAMPCOUNTS 2020

CampCounts 2020 is one of three annual surveys conducted by the ACA Research Team. The purpose of the CampCounts series is to support camp professionals in their operational decision making and to support ACA’s advocacy efforts. Responses are anonymous and reported in aggregate by the following segments: primary program type (day and overnight), business model, budget size, and region. This report describes CampCounts 2020, which was unique in its efforts to capture the effects of the COVID-19 pandemic on camps in the U.S. Results are compared to the 2017 ACA Business Operations Survey (now called CampCounts) where possible.

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SURVEY METHODS

Population

The primary contacts for ACA member camps were invited to participate in this study via direct email. Camps not in ACA's direct email list were invited to participate via partner outreach (e.g., parks and recreation day camps were invited to participate by several state parks and recreation associations) and social media campaigns. Respondents were asked to ensure only one representative from their camp completed the survey such that each response represents a single camp.

Online Survey

The 152-item survey was distributed via Qualtrics survey software. Branching logic was used to customize the survey such that respondents only answered questions that were relevant to their summer 2020 operational status (operated in-person programs or did not offer in-person programs). Respondents representing independent camp programs located at multiple sites also received a customized set of questions. Given this structure, respondents did not complete all 152 items. Average time to completion was 35 minutes. The survey was open and accessible via an anonymous link from September 23, 2020, to November 2, 2020.

Response

A total of 1,193 individuals responded to the survey representing 1,489 individual camp programs. The majority of camps responding to this survey operated at a single location with a single staff and operations (694/80 percent) versus operating camps at multiple sites (176/20 percent). In most cases, information was disaggregated for responses representing multiple programs, thus the response number indicated with each set of results represents that number of individual, independent camps. Any result containing information pertinent to multiple sites is indicated as such.

Because of the recruitment method, it is difficult to determine response rate. Most (71 percent) respondents representing single camp sites/programs and almost half (44 percent) of respondents representing multi-site programs indicated their camp(s) was/were ACA-accredited. We estimate this represents approximately 20 percent of all camps that were accredited by ACA at the time of this report.

Cleaning

Screening procedures were employed to clean the data prior to analyzing the data. Responses were removed if they responded to less than 10 percent of relevant items, resulting in 872 usable responses that were included in the analysis. Items were analyzed on a per-item basis, meaning the results represent a different number of responses. The number of responses analyzed for each item is indicated as $N =$ throughout the report. No notable patterns among the incomplete responses were detected.

Reporting

Results are reported according to the segments described in the table below. We compared the response segments to ACA membership, which, at the time of this report, was just shy of 3,000 camps in the US. While ACA membership is one snapshot of camps in the US, we believe it only represents about 20 percent of all camps in the country, and it is likely the camps that are ACA members and/or accredited may not represent the full distribution of camps, particularly according to business model. The respondents to this survey represent ACA membership by program type (day, overnight, and combo), and by region; however, there is a slight over-representation of nonprofit camps in relation to for-profit camps. It is important to interpret these results with these potential biases in mind.

CampCounts Sample Profile By Segment

Segment		Description	Number of Responses	Percent of Segment	Percent of ACA Member Camps
Primary Program Type	Day	50% or more day camp programming	337	40%	46%
	Overnight	50% or more overnight camp programming or overnight rentals	437	50%	35%
	Combo	Even distribution of two or more program types (day, overnight, and rental)	95	11%	19%
	TOTAL FOR PROGRAM TYPE		869		
Camp Owner/Sponsor	Independent nonprofit (INP)	501(c)(3) status but not affiliated with an agency or umbrella organization	266	31%	16%
	For-profit (FP)	Commercial status, sometimes affiliated with an umbrella organization	194	22%	21%
	Municipal/government (Gov)	City, county, state, or federal programs	74	8%	2%
	Nonprofit affiliated with another entity (NP-Affiliated)	501(c)(3) status affiliated with an agency, faith/religious organization, school, etc.	338	39%	21%
	TOTAL FOR CAMP OWNER/SPONSOR		872		
Typical Annual Operating Budget	\$200,000 or less	Respondents were asked to report their typical operating budget, assuming 2020 was not a typical budgetary year for most camps.	173	22%	29%
	\$200,001-\$500,000		134	17%	15%
	\$500,001-\$1,000,000		164	21%	17%
	\$1,000,001-\$5,000,000		268	34%	29%
	\$5,000,001 or more		43	.06%	9%
	TOTAL FOR TYPICAL OPERATING BUDGET		782		
US Region	New England (NE)	CT, ME, MA, NH, RI, VT	96	13%	13%
	Mid-Atlantic (MidAtl)	DE, DC, MD, NJ, NY, PA, VA, WV	208	28%	30%
	South (South)	AL, AK, FL, GA, KY, LA, MS, NC, OK, PR/VI, SC, TN, TX	112	15%	16%
	Mid-America (MidAm)	IL, IN, IA, KS, MI, MN, MO, NE, ND, OH, SD, WI	182	24%	22%
	West (West)	AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY	148	20%	19%
	TOTAL FOR REGION		746		

CampCounts Sample Profile by Nonprofit Affiliation

Nonprofit Affiliation	Day	Overnight	Combo	TOTAL
College or university	7	5	2	14
Faith-based organization	14	42	27	83
Health organization	0	5	0	5
K-12 school	13	0	1	14
Local, state, or federal government (e.g., public parks & recreation agency)	4	0	1	5
Other	14	10	1	25
Youth-serving agency (e.g., YMCA, Girl Scouts, 4-H, CampFire)	46	98	22	166
TOTAL	98	160	54	312

2020 CAMP PARTICIPANTS, STAFF, AND PROGRAM SNAPSHOT

Camp Participants

Respondents were asked to report the number of unique campers served in the entire 2020 year and in summer 2020 specifically. Unique campers served counts each participant only one time, even if they attended multiple sessions of camp. This is an important metric for understanding the total reach of camp programs in the US.

These averages were calculated using only the enrollment numbers reported. Blank cells represent segments where no enrollment was reported, or there were too few responses to report. This could be an omission by the respondent and should not be interpreted as no campers served. Overall, response rate for this section was low, so interpret with caution.

As expected, there were fewer campers served across all camp types in 2020. Our data suggest there was a 61 percent decline in day campers served and 26 percent fewer overnight campers served. While we expected fewer campers served in overnight camps, it is possible that a small number of camps in the Mid-Atlantic region served a larger than expected number of overnight campers in 2020, thus skewing the data.

Average Number of Unique Campers Served Per Camp in 2020 and 2019, by Region

	Day Campers		Overnight Campers		Rental Guests	Virtual Campers
	2020	2019	2020	2019	2020	2020
Day Camps	270	691				170
NE	356	580				187
MidAtl	179	491				253
South	164	479				185
MidAm	423	862				53
West	216	1,116				58
Overnight Camps			466	627		316
NE			176	326		468
MidAtl			1,062	638		135
South			371	1,060		687
MidAm			423	659		183
West			340	658		290
Combo Camps	428	220	379	812	825	482
NE	398	254		527	418	25
MidAtl	374	236	20	617	1,225	901
South	1,588	191	435	1,042	634	517
MidAm	172	185	425	617	1,086	154
West	34	265	400	1,085	421	100

Virtual campers are included here because they were reported by respondents representing all program types. This does not indicate that all camps served campers virtually in 2020; this is the average number of campers served virtually across camps that served campers virtually.

Unique Campers Served in 2020 by Camp Owner/Sponsor

	Day Campers		Overnight Campers		Rental Guests	Virtual Campers
	2020	2019	2020	2019	2020	2020
Day Camps	340	691				185
INP	238	616				131
FP	682	1,085				80
NP-Affiliated	338	616				225
Gov	109					70
Overnight Camps			515	627		338
INP			443	377		400
FP			685	529		160
NP-Affiliated			431	969		310
Combo Camps	391	219	1,066	812	907	593
INP	165	151	415	762	561	438
FP	699	223		322	3,267	50
NP-Affiliated	377	261	281	928	779	725
Gov			369		1,117	

Total averages for day, overnight, and combo camps differ slightly from the table above due to response discrepancies. Values reported reflect the responses by segment.

Camp Participant Demographics

This question was asked only of camps that served campers on-site in summer 2020. Questions were stated as follows:

*Estimate the percent of all 2020 campers/guests that fall into the following broad **household income** categories. Please estimate if you do not have this information readily available. Use whatever makes sense for your region and the communities you serve to determine how you define these categories. Include campers/guests served through all program types, across all sites, and for the entire 2020 year. Skip if you did not serve any campers in any capacity in 2020.*

*Estimate the percent of all 2020 campers/guests that fall into the following **age** categories. Please estimate if you do not have this information readily available. Include campers/guests served through all program types, across all sites, and for the entire 2020 year. Skip if you did not serve any campers in any capacity in 2020.*

*Estimate the percent of all 2020 campers/guests that fall into the following **race/ethnicity** categories. Please estimate if you do not have this information readily available. Include campers/guests served through all program types, across all sites, and for the entire 2020 year. Skip if you did not serve any campers in any capacity in 2020.*

Percent of Campers Served by Demographic Characteristics

		Day Camps	Overnight Camps	Combo Camps
Household Income	No income/poverty	3.48%	2.85%	2.73%
	Low-income	11.35%	10.95%	14%
	Middle-income	37.03%	29.45%	39.18%
	High-income	24.39%	19.94%	11.69%
Age	5 years old or younger	10.04%	1.32%	2.44%
	6-9 years old	38.27%	11.64%	11.53%
	10-12 years old	23.26%	21.30%	19.14%
	13-17 years old	7.59%	19.39%	15.32%
	18 years old or older	1.74%	12.94%	23.39%
Race/Ethnicity	American Indian or Alaska Native	0.50%	.57%	.25%
	Asian	4.71%	1.51%	2.10%
	Biracial or Multiracial	4.47%	2.59%	3.17%
	Black/African American	9.04%	4.20%	4%
	Caucasion/White	48.46%	45.79%	51.17%
	Hispanic/Latinx	5.62%	3.49%	5.99%
	Native Hawaiian/Pacific Islander	0.19%	0.07%	0.20%
	Other	1.05%	1.40%	0.75%

This table is based on the following responses: Day camp respondents = 195, Overnight camp respondents = 324, Combo camp respondents = 74. Total respondents = 593. Percentages for each segment might not sum to 100% as respondents were asked to estimate the percent in each category but not forced by the survey software to input responses to total 100%.

Camp Staff Demographics

This question was asked only of camps that served employed staff at any point in 2020. Questions were stated as follows:

Estimate the percent of all 2020 seasonal and year-round staff that fall into the following race/ethnicity categories. Please estimate if you do not have this information readily available.

Camps responding to this survey indicated employing a variety of seasonal and year-round staff members. On average, more than half of all year-round employees and between 42 percent to 52 percent of seasonal employees were White. Very few staff members from these camps were American Indian or Alaska Natives, nor Native Hawaiian/Pacific Islander. Still, compared to 2018, this seems to represent an increase in diverse representation amongst seasonal staff, who were more than 71 percent White on average at day camps and more than 78 percent White at overnight camps.

Note: We are comparing 2020 to data collected in the 2017 Business Operations Survey, where the question was stated as follows: *“What is the racial/ethnic makeup of this year’s paid staff (year-round and seasonal)?”* Thus, what you see below is our best attempt to compare “Paid Staff” to “Seasonal” and “Year-Round” staff, although it is possible that some camps might engage volunteers as seasonal and/or year-round staff. The differences between the 2017 and 2020 data are also likely related to reporting error as many respondents did not enter percentages such that they totaled 100 percent.

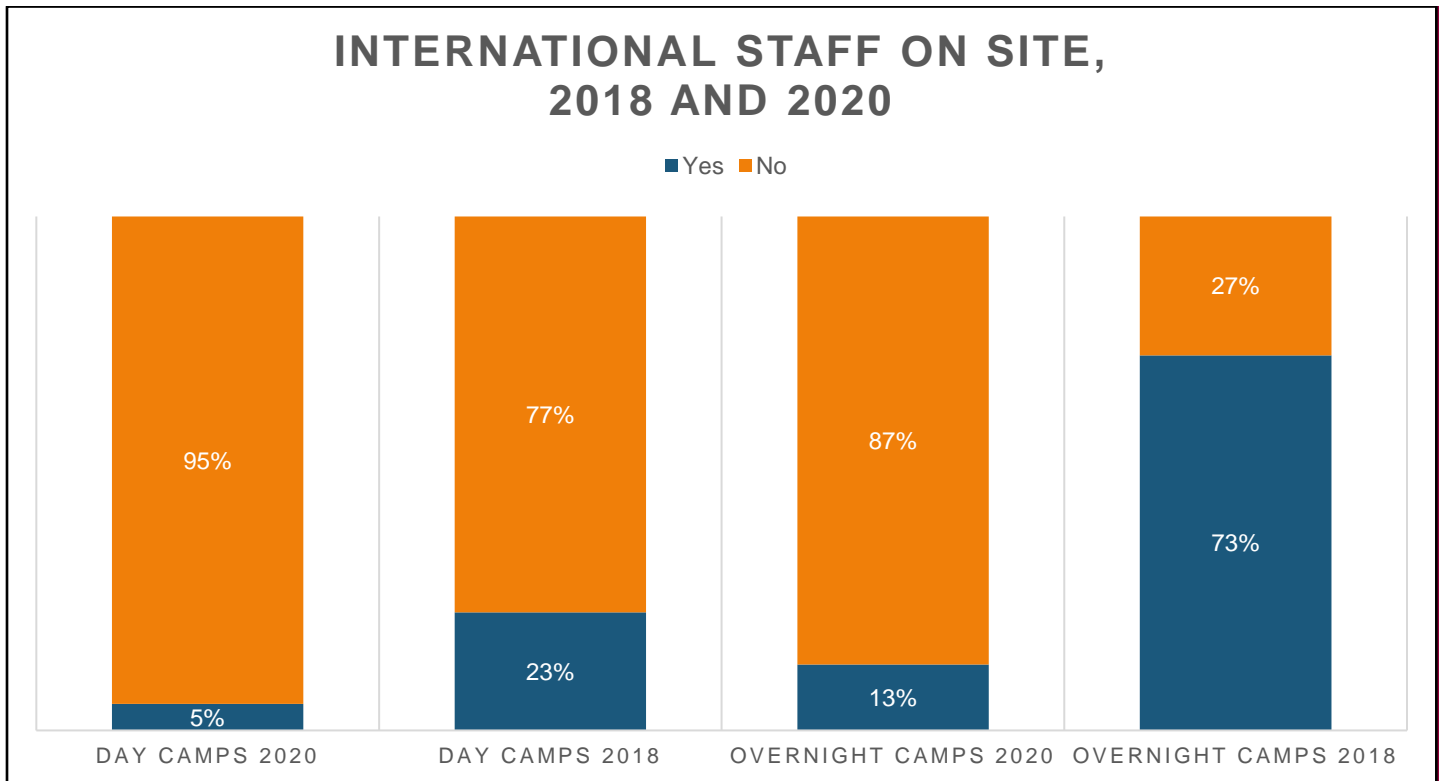
Percent Paid & Seasonal Staff by Race/Ethnicity

	Day Camp		Overnight Camp		Combo Camps	
	2020 Seasonal	2020 Year-Round	2020 Seasonal	2020 Year-Round	2020 Seasonal	2020 Year-Round
American Indian or Alaska Native	.73%	.46%	0.11%	0.19%	0%	0%
Asian	1.63%	1.47%	0.64%	0.35%	1%	0%
Biracial or Multiracial	2.51%	1.87%	1.66%	0.42%	1.17%	0.61%
Black/African American	7.39%	4.96%	2.76%	1.08%	5.67%	2.18%
Caucasion/White	49.47%	54.89%	42.20%	64.22%	51.44%	63.70%
Hispanic/Latinx	3.53%	3.45%	3.03%	1.54%	3.94%	5.89%
Native Hawaiian/Pacific Islander	0.05%	0.10%	0.19%	0.04%	0%	0%
Other	0.82%	1.12%	0.49%	0.61%	0.10%	0%

Day camp respondents = 195, Overnight camp respondents = 324, Combo camp respondents = 74. Total respondents = 593. Percentages for each segment might not sum to 100% as respondents were asked to estimate the percent in each category but not forced by the survey software to input responses to total 100%.

International Staff

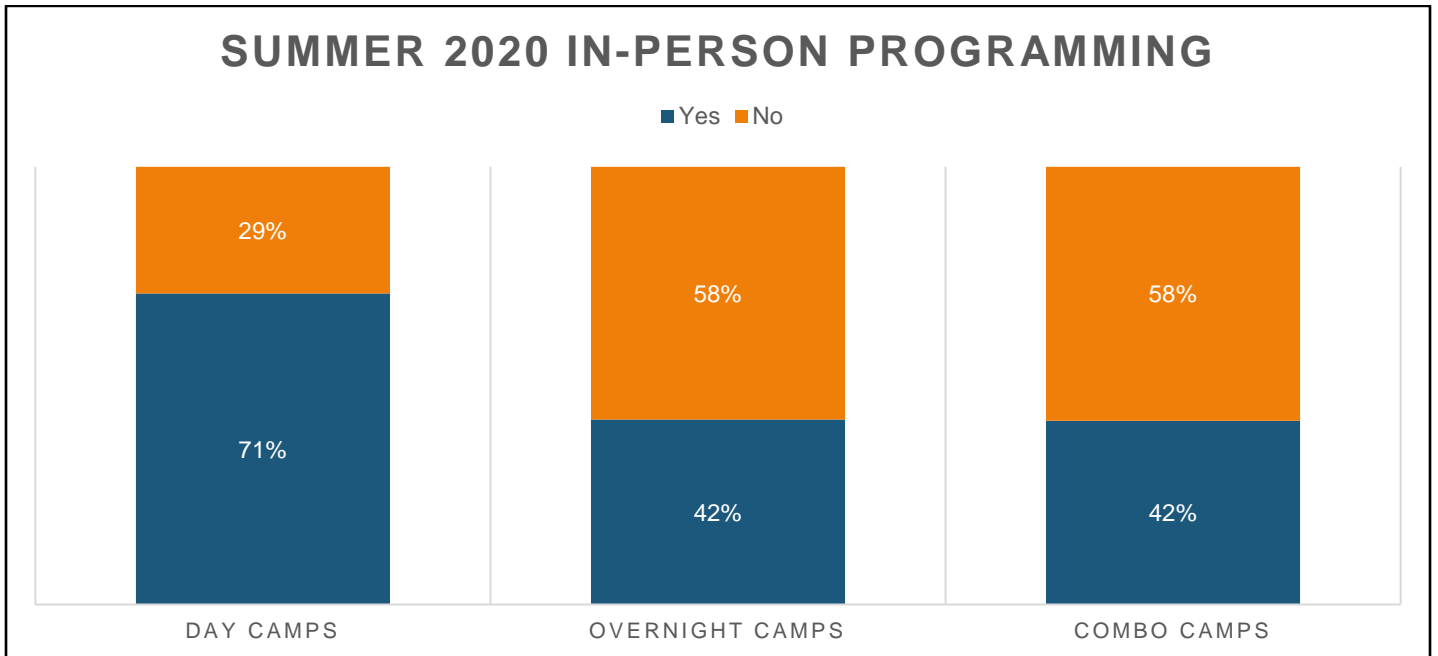
In response to the challenges of the COVID-19 global pandemic, the United States Department of State temporarily suspended routine visa services at all US Embassies and Consulates, resulting in a significant reduction of international summer camp staff members. Only 5 percent of day camps and 13 percent of overnight camps indicated having any international staff or staff who were cultural exchange visitors (J-1 Visa holders) on site at any point in 2020 (down from 23 percent and 73 percent, respectively, in 2018). International day camp staff reportedly came from England, Ireland, Israel, Poland, and the UK. International overnight camp staff came from the Australia, Azerbaijan, UK, Canada, China, Columbia, Germany, Holland, Hungary, India, Israel, Ireland, Mexico, New Zealand, Poland, Russia, Scotland, Slovakia, South Africa, Spain, Sweden, and Turkey.



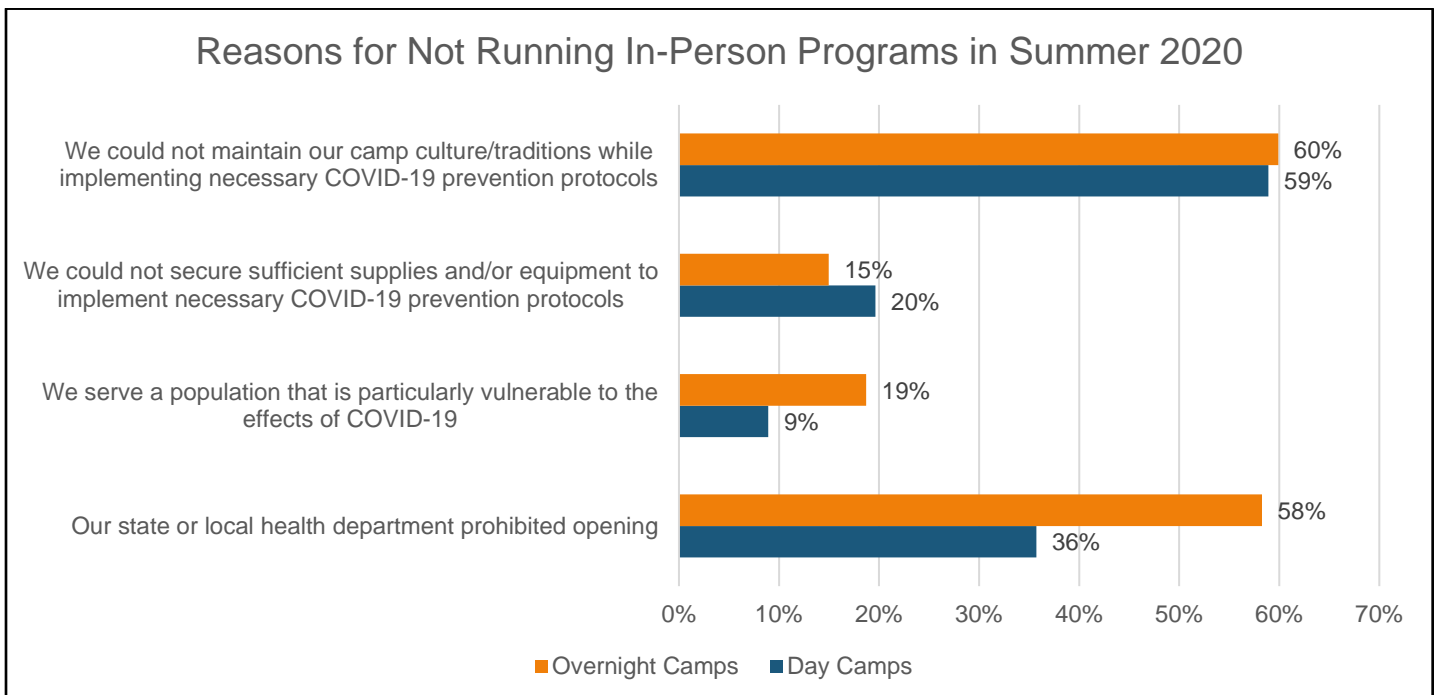
2020 N=300 responses

Programs & Program Pivots

When asked about their reasons for not running in 2020, the most common reason indicated by camps responding to this survey was “we could not maintain our camp culture/traditions while implementing necessary COVID-19 prevention protocols.” These results mirrored findings from ACA’s Camps & COVID qualitative study in which 35 camp directors were interviewed about their summer 2020 decision-making process across three distinct time points. “It’s just not camp,” was a common refrain amongst those who opted not to take on virtual or alternative programming. The second most commonly reported reason for not running programming in summer 2020 was “our state or local health department prohibited opening.” As late as June 30, 2020, typically the midpoint of an average camp season, overnight camps were not permitted to operate in four states (Connecticut, New Jersey, New York, and Oregon), 22 states were still waiting for the green light, and three states remained restricted by county regulations.



N = 657



Responses above reflect only camps that indicated they did not run in-person programs in summer 2020. N = 243 individual responses, respondents to this question were allowed to select all that apply.

Of those camps who indicated they did not offer in-person programming in 2020 but offered some “other” kind of programming substitute, some examples include child care, family programs (e.g. family gardening, family camping and rentals, takeout meals), equipment rentals, and extended use of facilities and resources (e.g., supporting local Meals on Wheels programs, renting camp vans to other camps in operation, and offering their site as a base camp for local fire departments fighting forest fires.)

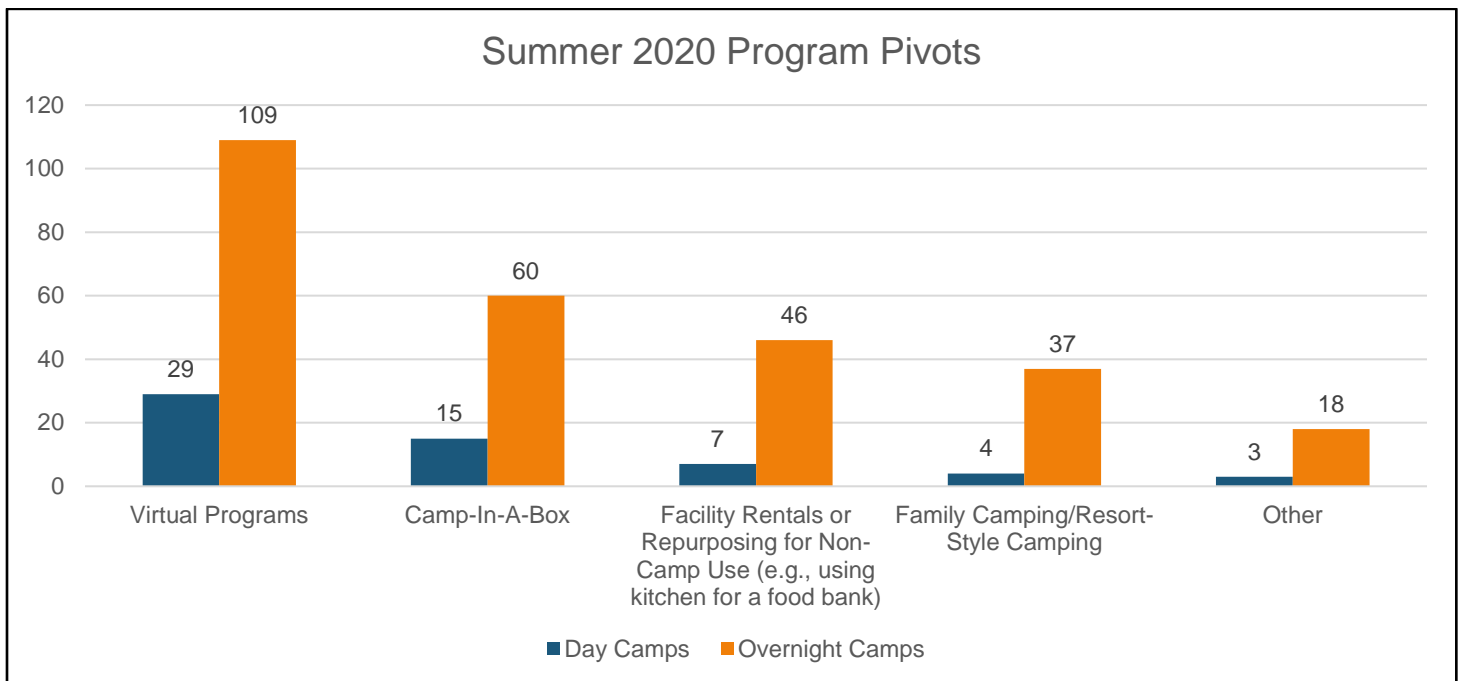


Chart above represents only respondents that indicated they did not offer traditional in-person programming in summer 2020 and who answered “yes” to any of the program pivots provided.

While several of these same camps expressed a hopefulness that none of their changes would have to be permanent, or remained in a “TBD/Uncertain/Still Assessing” state of consideration regarding the permanence of changes they made, many camps discovered new programs, protocols, and procedures that are likely to stick around even in a post-pandemic summer. The most commonly reported changes that camps suggested would likely be permanent involved a continuation and further integration of virtual programming (both summer-specific and year-round, actual enrolled programming and simple engagement/communication strategies, and also virtual training options for staff), cleaning protocols, and changes to the check-in/check-out process.

Similarly, several camp directors interviewed as part of the Camps & COVID Summer 2020 Decision-Making research study highlighted some of the pleasant surprises that came out of programmatic changes in response to the pandemic that they’re looking forward to holding on to, such as contactless drop-off and pickup and the elimination of package deliveries during extended overnight camp stays. Many also spoke to the advantages of cohorts. For example, one camp, responding to the need for campers to move through the day in a group, shifted activities that may have been an elective for some or activities that in a normal summer would have come with an extra fee instead became standard and all campers were able to participate regardless of cost. Another camp that normally took a free-choice approach to camper programming was forced to shift to a cohort model, but the camp director has decided to maintain the cohorts “at least in the mornings, no matter what” because it got campers to step outside of their comfort zone (though still with the support of their cabin group or cohort) and try activities they may not have otherwise chosen for themselves.

Preliminary Findings Associated with Camp Programmatic and Health Care Changes that Could Become Permanent Following the Summer of 2020 and the Onset of COVID-19

Barry A. Garst, Laurie Browne, Tracey Gaslin- Jan 2021

In September of 2020 the American Camp Association (ACA) and the Association of Camp Nursing (ACN) collaborated on the development and distribution of a survey to better understand how the camp community responded to the onset of COVID-19 the previous summer. One of the open-ended survey questions examined changes made in the summer of 2020 in response to COVID-19 that respondents believed could become permanent. Out of 859 camp directors and camp health care professionals who were surveyed, 458 responded to the question (53% response rate).

While ~60 respondents (13%) indicated that no changes made in the summer of 2020 would be continued in the future, other respondents indicated a range of changes that had operational, programmatic, or health care service implications. One, a large number of respondents indicated that virtual programs would continue for year-round camper and staff engagement, enhanced program diversity, and improved pre-camp staff training. Two, camps indicated that new and enhanced cleaning and sanitizing procedures would continue to be used in the future. A new feature at many camps in the summer of 2020 was the installation of outside handwashing stations. Respondents shared: *"...handwashing at the newly installed handwash sink outside of the mess hall will remain a procedure for mealtimes"* and *"...outdoor handwashing will be a must from now on."* Three, respondents indicated that health services (e.g., triaging, medication administration) that had moved to outdoor spaces (example, under a portable tent) would be commonplace in the future. As one respondent noted, *"More patient care outside the health center, to create less congestion."* Four, respondents suggested that new camper check-in procedures (e.g., drive thru, scheduled, virtual) which allowed for health screening (including for COVID-19) before campers intermingled, would become an ongoing feature of future camp sessions.



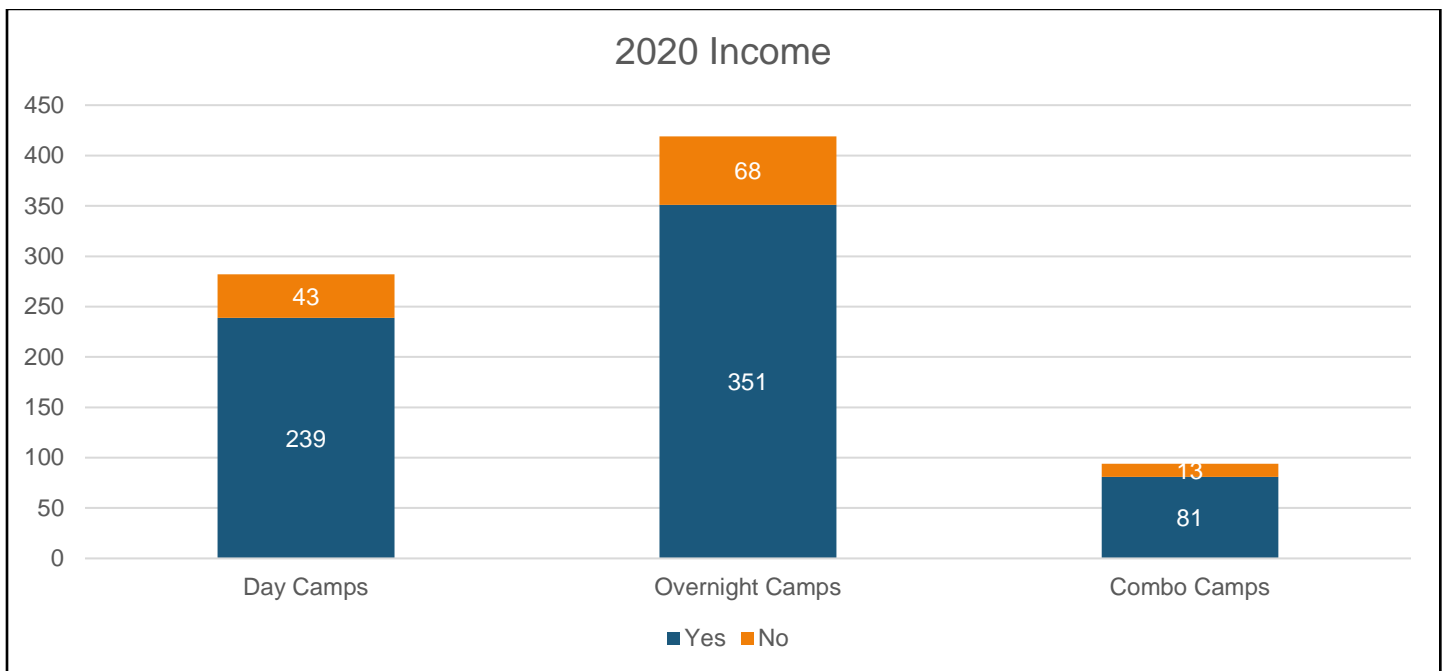
2020 CAMP FINANCIAL SNAPSHOT

In this section we asked respondents to report their actual 2020 income and expenses, even if they did not have any income due to COVID-19. Comparisons with the 2017 Camp Business Operations Study are offered where possible.

Most camps reported income and expenses for a single camp program or site. Those reporting on multiple sites were asked to provide figures for all sites together as well as an average or value for their most typical site.

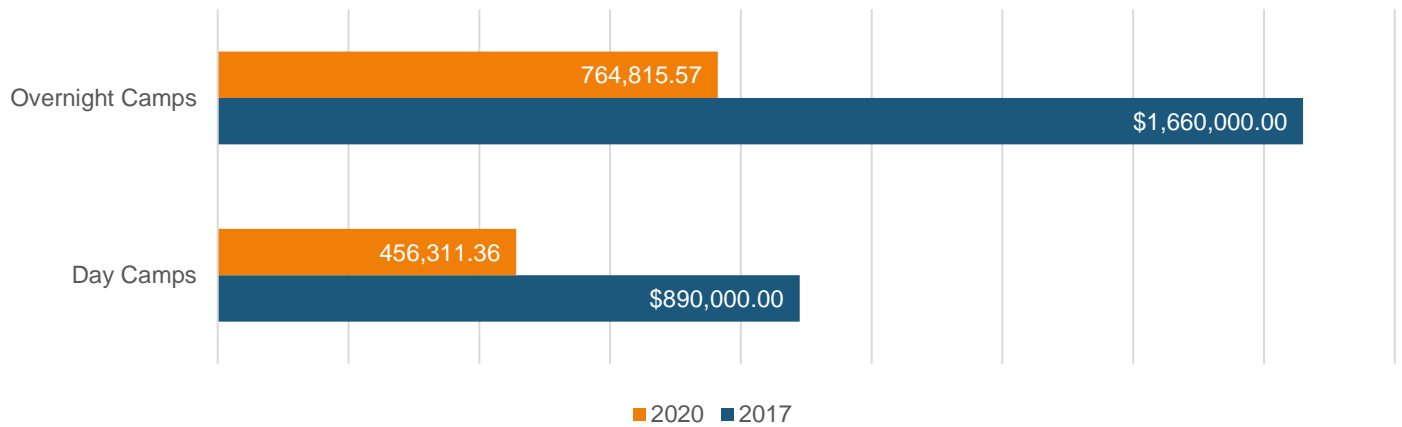
2020 Income & Camp Fees

When asked if they had any income in 2020, or anticipated any income between the time of taking the survey and the end of 2020 (including fees collected, contributions, or loans received), most camps responded “yes.” Only camps reporting income in 2020 are included in the following set of findings.



N = 795 responses

Gross Income 2020 versus 2017



Average Gross Income in 2020

		Day	Overnight	Combo	TOTAL
Camp Owner/Sponsor	INP	\$433,751.14	\$777,728.29	\$633,162.59	\$671,350.73
	FP	\$975,090.32	\$1,212,134.00	\$1,114,000.00	\$1,120,597.58
	Municipal/government	\$49,292.45		\$375,000.00	\$63,453.65
	NP-Affiliated	\$234,920.21	\$443,878.00	\$589,030.82	\$405,828.71
	TOTAL BY OWNER/SPONSOR	\$456,311.36	\$764,815.57	\$632,983.49	\$646,087.89
Region	Mid-American	\$338,866.88	\$480,540.19	\$604,690.79	\$451,835.64
	Mid-Atlantic	\$562,927.61	\$1,044,485.45	\$264,750.00	\$741,988.07
	New England	\$808,536.09	\$1,239,397.16	\$340,500.00	\$1,090,126.95
	Southern	\$232,521.30	\$599,326.70	\$680,124.42	\$516,205.69
	Western	\$218,725.81	\$708,610.49	\$746,500.00	\$595,155.55
	TOTAL BY REGION	\$448,946.06	\$786,215.23	\$583,615.18	\$649,107.21
Typical Operating Budget	\$200,000 or less	\$70,619.64	\$50,480.77	\$42,125.00	\$63,836.78
	\$200,001-\$500,000	\$159,228.03	\$146,269.88	\$215,900.00	\$161,423.24
	\$500,001-\$1,000,000	\$361,821.63	\$323,916.06	\$392,333.33	\$348,786.34
	\$1,000,001-\$5,000,000	\$1,169,586.65	\$1,129,496.65	\$1,302,202.47	\$1,152,884.64
	\$5,000,001 or more	\$2,176,666.67	\$2,080,814.67	\$1,735,417.75	\$2,041,742.11
	TOTAL BY REGION	\$458,299.69	\$765,529.22	\$632,983.49	\$647,973.09

Average Gross Income in 2020 by Nonprofit Affiliation

	Day	Overnight	Combo	TOTAL
College or university	\$5,800.00	\$700,000.00	\$2,000,000.00	\$677,900.00
Faith-based organization	\$289,752.51	\$338,609.20	\$549,681.82	\$400,277.83
Health organization		\$487,500.00		\$487,500.00
K-12 school	\$441,175.00			\$441,175.00
Local, state, or federal government (e.g., public parks & recreation agency)	\$453,000.00		\$586,000.00	\$497,333.33
Other	\$46,818.18	\$137,142.86	\$300,000.00	\$93,421.05
Youth-serving agency (e.g., YMCA, Girl Scouts, 4-H, CampFire)	\$229,143.96	\$443,855.63	\$450,347.58	\$387,341.12
TOTAL	\$236,637.71	\$396,608.50	\$550,896.51	\$374,620.76

Average Gross Income by Income Categories, 2017 and 2020 (in percent)

	Day		Overnight		Combo
	2017	2020	2017	2020	2020
Summer youth camp registration fees	78.9	64.17	60.2	21.7	10.41
Adult program registration fees	0.9	0.73	3.0	2.38	4.26
CIT/LIT/Teen leadership program registration fees	2.0	0.94	2.2	0.56	0.55
School youth program (non-camp) registration fees	1.3	4.55	3.0	1.97	3.90
Group/conferencing rental fees	1.4	0.63	7.3	10.78	24.04
Activity/transportation/insurance fees	1.4	0.18	0.5	0.79	0.1
Camp store/book store revenues	0.3	0.94	1.6	1.65	1.17
Contributions for operations and/or for capital expenses	2.6	4.03	8.1	18.72	19.16
Contributions/scholarships/camperships (include COVID-specific fundraising/donations other than loans here)	5.9	6.58	10.1	18.03	17.65
All other income (include PPP and other COVID-specific loans here)*	5.3	10.76	3.9	19.02	9.84

PPP and other COVID-specific loans are not income; however, we asked camps to report these figures here for the sake of year-to-year benchmarking.

2020 Enrollment Fees by Session

A good percentage of camps surveyed for this study reported offering some combination of day, overnight, and rental programming. This was even more complex this year as some camps reported to pivoting to new program structures due to COVID-19. The table below represents fees for whatever programming was actually offered in 2020, thus it is possible that an overnight camp reported day camp fees. In general, the number of respondents who shared fee information was low, so the results below should be interpreted with caution. Fees did not appear to vary meaningfully by region.

2020 Fees by Program Type

	2020 Day Camp Fee, Per Session	2020 Day Camp Fee, Per Day	2020 Overnight Camp Fee, Per Session	2020 Overnight Camp Fee, Per Day
Day Camps	\$650.00	\$65.70	\$267.50	\$90.00
Overnight Camps	\$280.00	\$54.48	\$3,303.00	\$210.39
Combo Camps	\$575.00	\$50.39	\$570.83	\$83.62
TOTAL	\$472.00	\$56.14	\$1,981.59	\$173.63

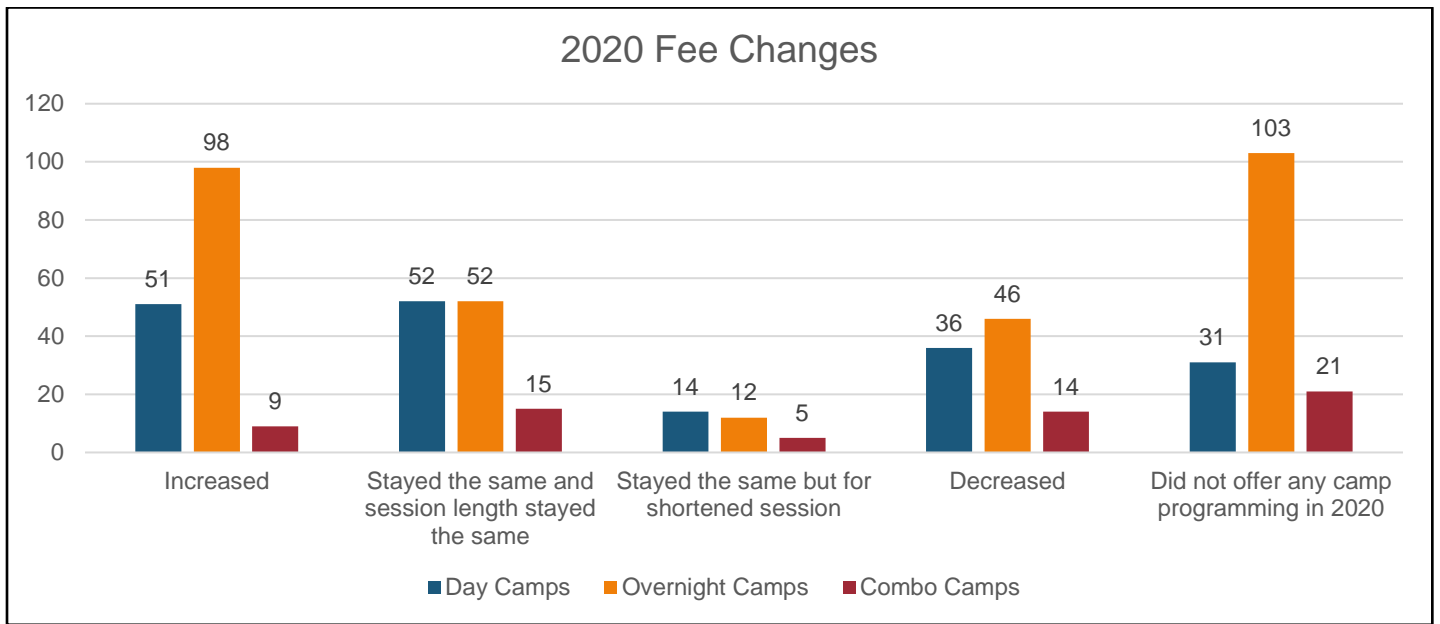
2020 Fees by Camp Owner/Sponsor

	2020 Day Camp Fee, Per Session	2020 Day Camp Fee, Per Day	2020 Overnight Camp Fee, Per Session	2020 Overnight Camp Fee, Per Day
INP	\$180.00	\$59.00	\$1,680.00	\$280.33
FP	\$825.00	\$114.99	\$7,525.00	\$209.68
NP-Affiliated	\$350.00	\$42.53	\$439.20	\$97.21
TOTAL	\$472.00	\$56.29	\$1,981.59	\$174.73

2020 Fee Increase/Decrease (by percentage)

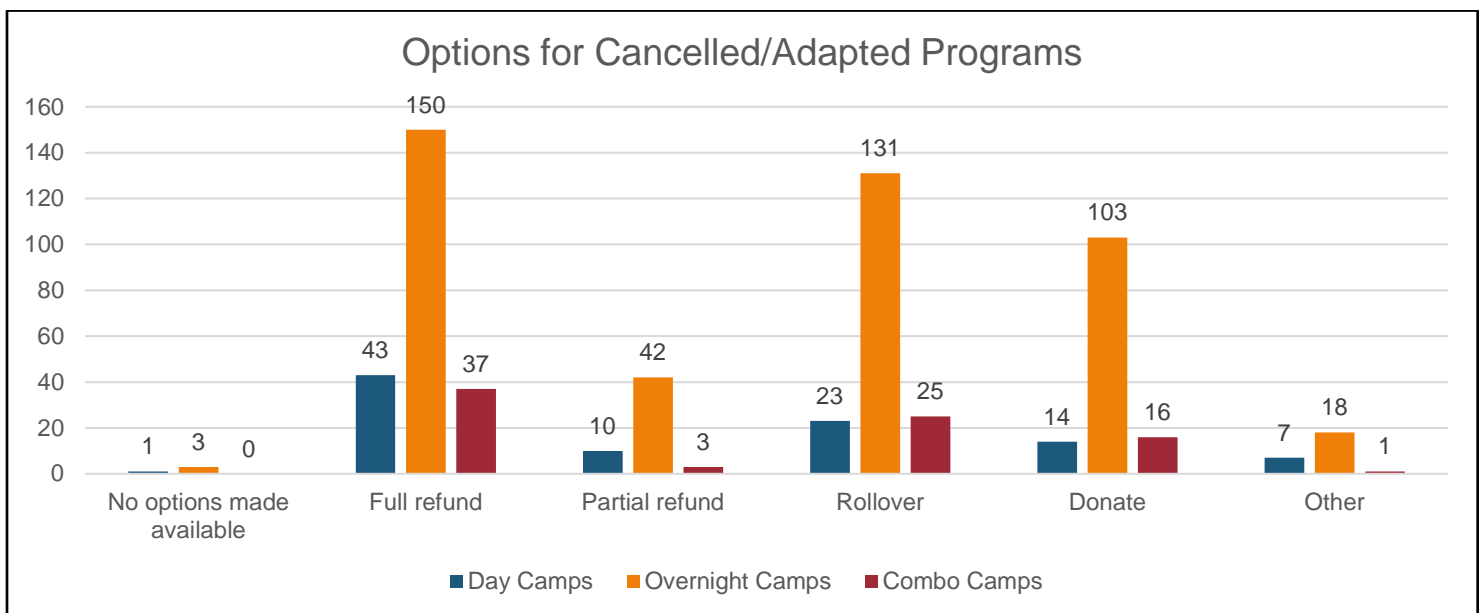
Day Camps	Min	Max	Mean	Median
Fee Increase Amount	0.01	300	17.298	5
Fee Decrease Amount	10	100	55.59	50
Overnight Camps				
Fee Increase Amount	1.5	25	4.28	3
Fee Decrease Amount	20	100	20	80
Combo Camps				
Fee Increase Amount	2	15	8.1	7
Fee Decrease Amount	10	100	73.09	98

When asked to identify the biggest reason why fees increased from 2019 to 2020, the most commonly selected response was “increased cost of inputs (e.g., COVID-related supplies or other program supplies)” followed by “to cover increased cost of living.”



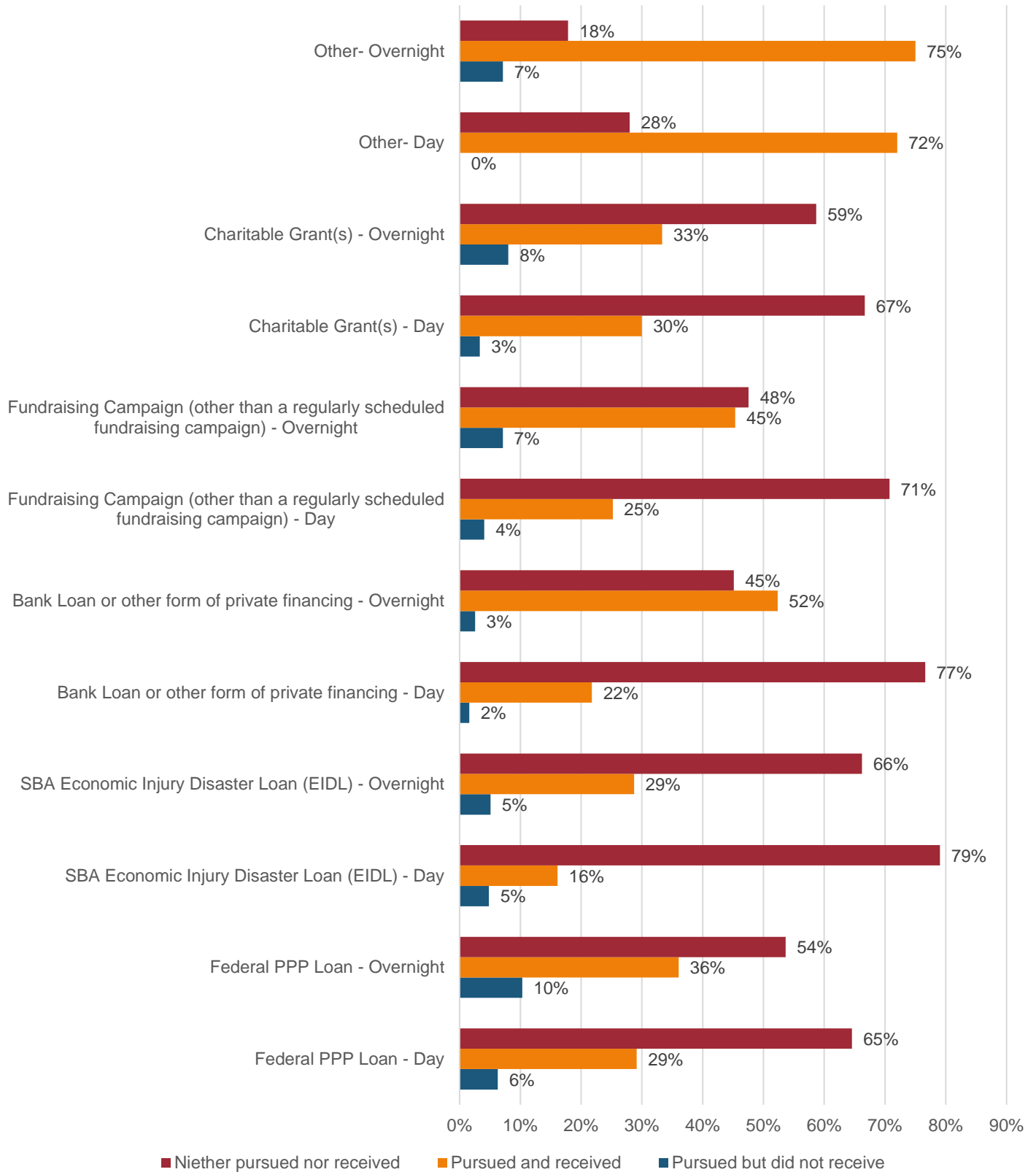
N = 559

Camps indicating that they did not offer in-person programming in 2020 were asked to select all of the enrollment fee options they offered for canceled and/or modified programming. The most commonly reported response across all camp types was a full refund, followed by the option to rollover to future programming or to donate enrollment fees to a fundraising campaign. When asked to elaborate on the amounts refunded, rolled over, and donated, responses were limited and extremely variable. Partial refunds ranged from \$28,000 to \$491,000 for day camps and from \$2,000 to \$1,000,000 for overnight camps. Rollover amounts ranged from \$200 to \$182,000 for day camps and from \$220 to \$12,000,000 for overnight camps, and donations ranged from \$600 to \$16,000 for day camps and from \$1,000 to \$815,000 for overnight camps. A few camps also simply stated a variation of “whatever they wanted” or “whatever amount they designated.”



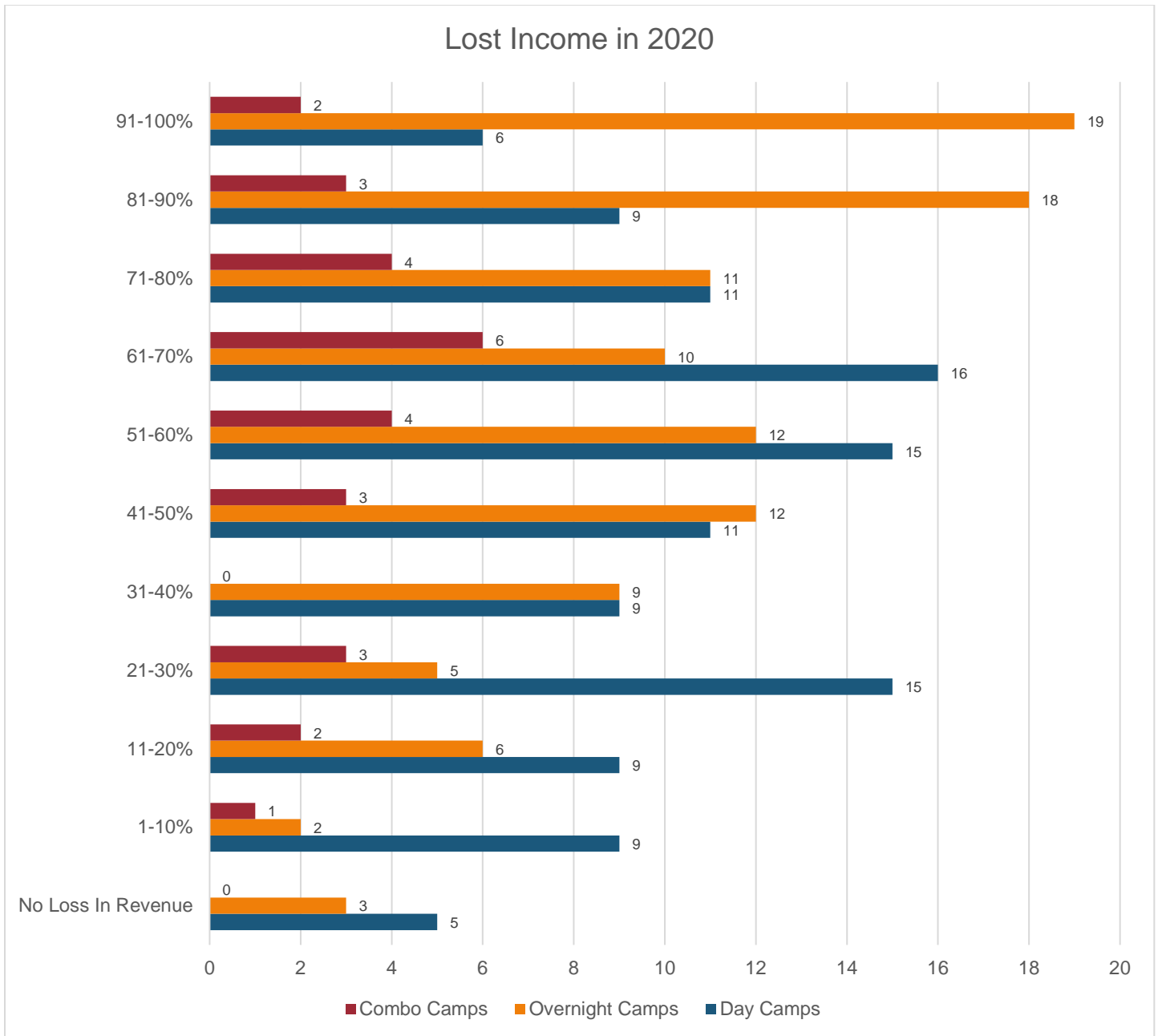
N=284 individual respondents; respondents were asked to select all that apply.

COVID-19 Financial Relief- Day & Overnight Camps



Percent of expected 2020 income lost due to COVID-19 enrollment restrictions

If you operated in-person programs in 2020, what, if any, was your loss of revenue due to enrollment/occupancy restrictions to prevent spread of COVID-19? Skip if you did not operate in-person programs in 2020.



N = 250

For camps that were able to open and run in-person programs in 2020, we asked if they experienced any loss in revenue due specifically to enrollment/occupancy restrictions to prevent the spread of COVID-19. Overwhelmingly, camps responded that they did indeed experience a loss in revenue due to these restrictions (only eight camps, or 3.2 percent of the respondents to this question, indicated that they did not experience a loss in revenue). Though this survey did not ask respondents to elaborate on this response, camp directors interviewed as part of ACA's Camps & COVID research study spoke to increased costs of supplies and the need for a higher staff-to-camper ratio in order to help manage the new protocols amongst campers, pointing to an overall increase in expenses. Of the camps interviewed, most were also operating at a decreased capacity and spoke of lost revenue as a result of both increases in COVID-related expenses and decreases in overall enrollment revenue.

2020 Expenses, Scholarships, & Profitability

Annual Expenses, 2017 and 2020

	Day		Overnight		Combo	
	2020	2017	2020	2017	2020	2020 AVERAGE
INP	\$339,477	\$283,000	\$867,845	\$696,000	\$823,487	\$728,993
FP	\$1,009,093	\$1,117,000	\$1,714,393	\$1,631,000	\$1,510,166	\$1,477,328
Mun/Gov	\$73,127				\$580,000	\$88,035
NP-Affiliated	\$192,668	\$301,000	\$714,839	\$933,000	\$654,553	\$558,792
2020 Average	\$413,274	\$780,000	\$1,052,774	\$1,450,000	\$778,784	\$813,946

2020 Expenses by Nonprofit Affiliation

	Day	Overnight	Combo	TOTAL AVERAGE
College or university	\$86,322.00	\$1,000,000.00	\$2,000,000.00	\$620,755.43
Faith-based organization	\$319,760.68	\$574,368.39	\$606,695.65	\$547,057.03
Health organization		\$222,500.00		\$222,500.00
K-12 school	\$196,500.00		\$103,000.00	\$186,111.11
Local, state, or federal government (e.g., public parks & recreation agency)	\$515,772.50		\$400,000.00	\$477,181.67
Other	\$65,528.57	\$342,571.43	\$700,000.00	\$237,113.33
Youth-serving agency (e.g., YMCA, Girl Scouts, 4-H, CampFire)	\$170,861.38	\$822,667.52	\$688,950.13	\$640,857.62
TOTAL AVERAGE	\$192,668.67	\$714,839.57	\$654,553.62	\$558,792.27

2020 Expense Breakout (by percentage)

	Day		Overnight		Combo
	2020	2017	2020	2017	2020
Salaries, benefits, and payroll taxes for seasonal employees (both full- and part-time)	31.79	38.9	10.03	19.7	10.01
Salaries, benefits, and payroll taxes for year-round employees (both full- and part-time)	22.27	13.8	31.86	19.5	28.77
Food and beverage (excluding camp store)	2.77	5.3	4.06	12.0	5.18
Program and supplies (excluding health center/infirmarium and COVID-related supplies)	9.52	11.8	4.62	8.2	5.19
Maintenance, upkeep, capital expenses (e.g., facility improvements — include COVID-19 related facility improvements here)	4.39	3.8	11.62	8.9	13.28
Insurance (e.g., auto, liability, property, worker's comp, etc.)	3.11	3.8	7.16	5.7	6.63
Utilities (e.g., electricity, propane/gas/diesel, waste/trash removal)	2.16	2.2	5.25	5.1	7.77
Transportation (e.g., vehicle leases, maintenance, fuel)	1.54	7.7	1.14	2.9	1.12
Property (e.g., lease/mortgage, not including capital improvements)	2.81	4.5	4.55	4.4	1.27
Taxes (sales/property)	1.13	1.0	1.96	2.0	0.99
All other expenses (include COVID-19 related supplies here)	6.69	7.2	6.89	11.5	5.66

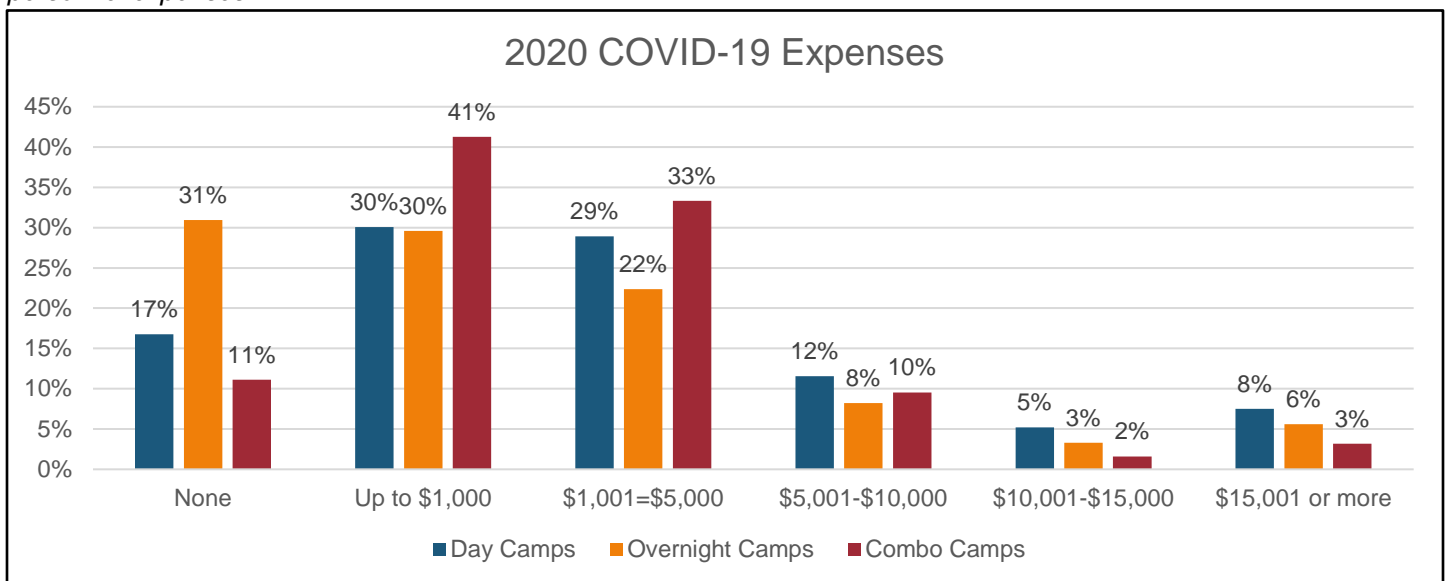
All Other Expenses, in Dollar Amounts, for ALL CAMPS (including those that ran in-person programs in 2020 and those that did not)

	Day		Overnight		Combo
	2020	2017	2020	2017	2020
Marketing/promotion	\$7,121.65	\$10,900	\$9,637.67	\$16,500	\$24,763.07
Training/professional development	\$22,214.45	\$4,770	\$3,221.15	\$8,170	\$2,666.40
Health center/infirmarium and related medical supplies, including PPE, sanitizer, and other COVID-19-related medical supplies	\$6,741.38	\$2,340	\$8,138.00	\$7,970	\$2,166.67

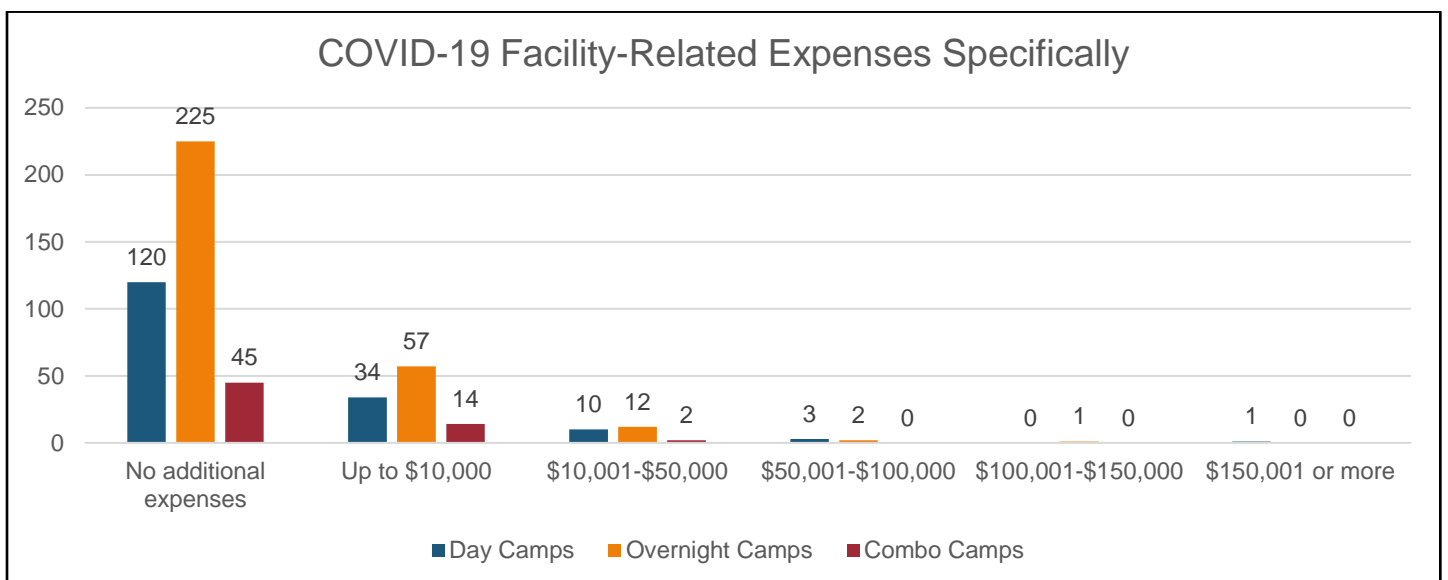
Health center/infirmary and related medical supplies, including PPE, sanitizer, and other COVID-19-related medical supplies for camps that ran in-person programs in 2020

	Combo	Day	Overnight	Total Average
Independent for-profit		\$7,500.00		\$7,500.00
Independent not-for-profit		\$5,783.33	\$3,200.00	\$5,414.29
Municipal/government		\$2,200.00		\$2,200.00
Not-for-profit affiliated with another entity (i.e., Y, Girl Scouts, a college or university)	\$5,000.00	\$12,688.89	\$17,433.33	\$14,531.58
Total Average	\$5,000.00	\$7,260.00	\$16,010.00	\$9,627.78

About how much did you spend on COVID-19 screening and testing supplies and other health and safety products (e.g., cleaning products, sanitizers, handwashing stations) that you would not have spent in a typical year? *Do not include personnel expenses



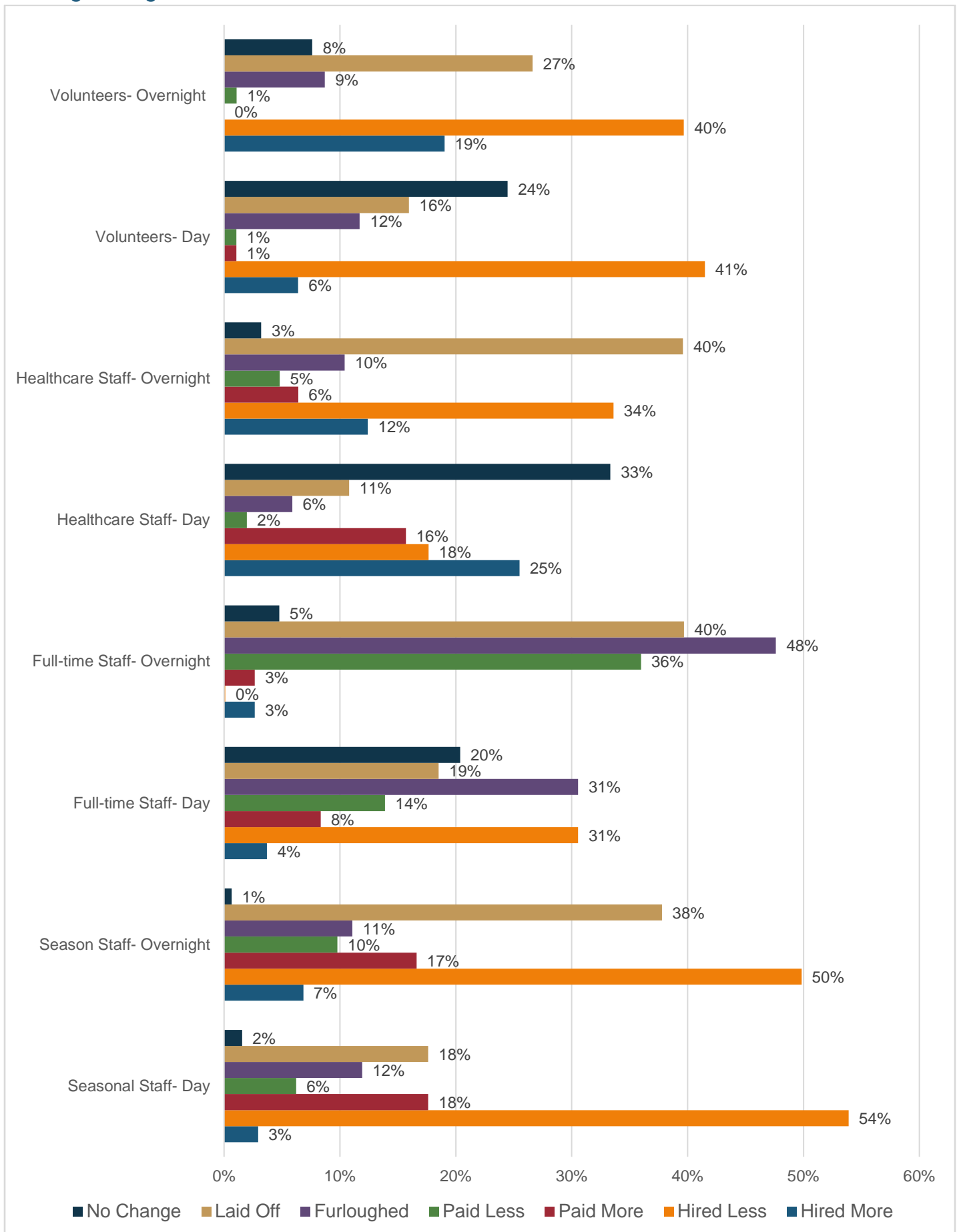
N=540



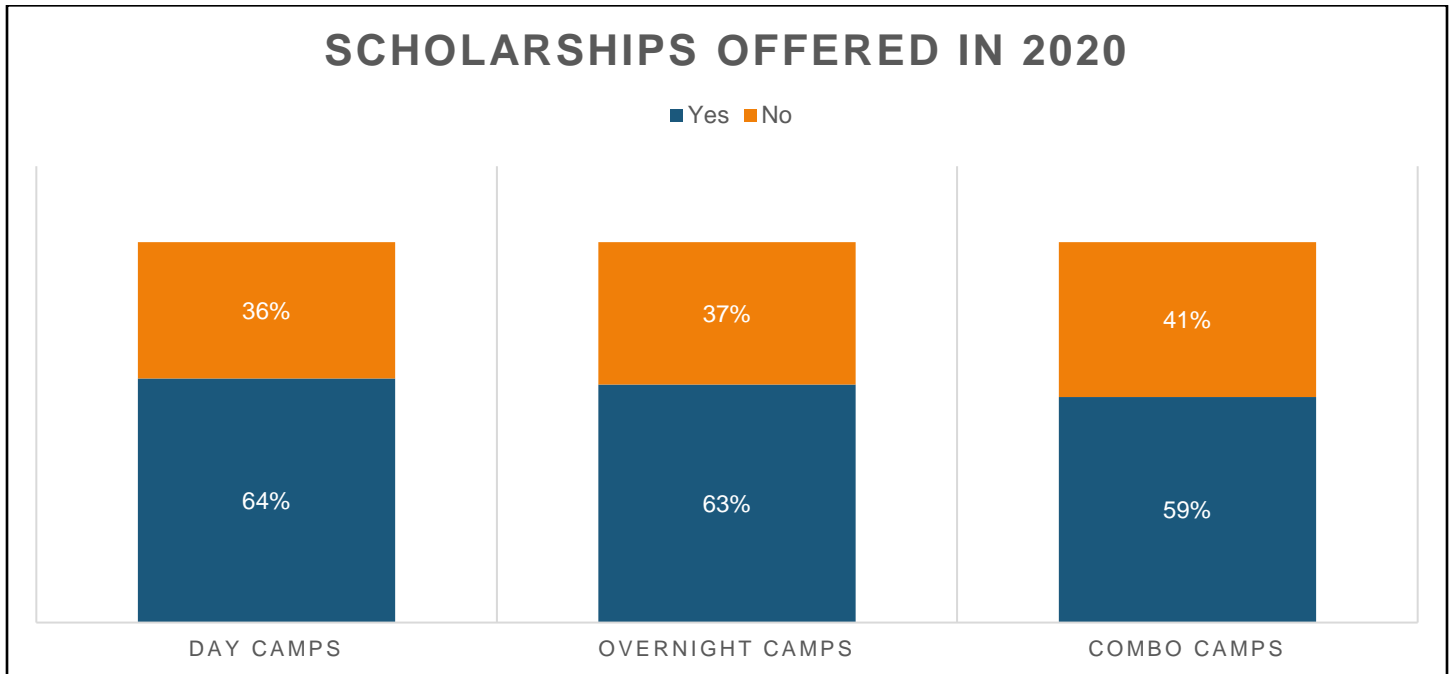
Overall Profitability, 2017 and 2020, by Program Type and Camp Owner/Sponsor

		INP	FP	Gov	NP-Affiliated	Grand Mean
Day	Income	\$382,255.23	\$898,944.65	\$53,403.65	\$245,370.23	\$403,319.06
	Expenses	\$339,477.29	\$1,009,093.62	\$73,127.11	\$192,668.67	\$413,274.60
	Inc-Exp	\$42,777.94	(\$110,148.97)	(\$19,723.46)	\$52,701.56	(\$9,955.54)
	%	11%	-12%	-37%	21%	-2%
	2017 Profit	\$203,000	\$342,000		\$168,000	\$202,000
	2017%	\$12.2%	\$17.6%		21.2%%	16.2%%
Overnight	Income	\$785,718.98	\$1,351,052.02		\$478,813.39	\$822,677.26
	Expenses	\$867,845.72	\$1,714,393.84		\$714,839.57	\$1,052,774.31
	Inc-Exp	(\$82,126.74)	(\$363,341.82)		(\$236,026.18)	(\$230,097.05)
	%	-10%	-27%		-49%	-28%
	2017 Profit	\$17,000	\$416,000		\$128,000	\$137,000
	2017%	1%	13.2%		2.5%%	3%
Combo	Income	\$633,162.59	\$1,291,200.00	\$375,000.00	\$494,571.11	\$588,586.81
	Expenses	\$823,487.88	\$1,510,166.67	\$580,000.00	\$654,553.62	\$778,784.35
	Inc-Exp	(\$190,325.29)	(\$218,966.67)	(\$205,000.00)	(\$159,982.51)	(\$190,197.54)
	%	-30%	-17%	-55%	-32%	-32%
Grand Mean	Income	\$655,996.73	\$1,185,712.83	\$61,866.71	\$410,141.45	\$647,017.85
	Expenses	\$728,993.54	\$1,477,328.50	\$88,035.13	\$558,792.27	\$813,946.28
	Inc-Exp	(\$72,996.81)	(\$291,615.67)	(\$26,168.42)	(\$148,650.82)	(\$166,928.43)
	%	-11%	-25%	-42%	-36%	-26%

Staffing Changes



Need-Based Scholarships/Discounts



N=814

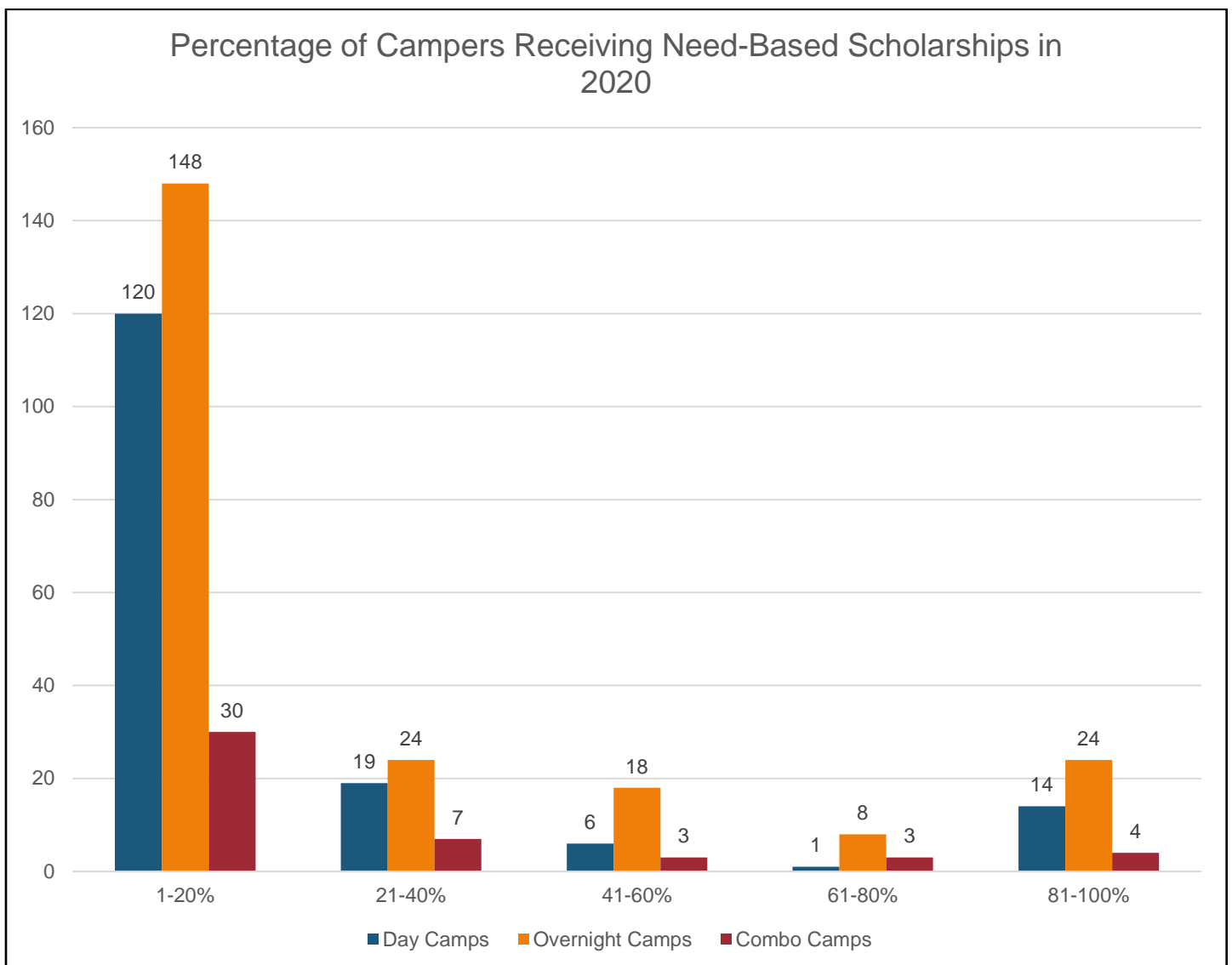
Average Total Value of Need-Based Scholarships/Discounts Awarded Per Camp in 2017 and 2020

	Day		Overnight		Combo	TOTAL
	2020	2017	2020	2017	2020	
INP	\$ 82,735.10	\$38,200	\$ 94,656.77	\$158,100	\$ 32,762.14	\$ 86,491.25
FP	\$ 28,134.13	\$57,600	\$ 83,291.50	\$89,800	\$ 25,125.00	\$ 64,825.47
Gov	\$ 4,466.30					\$ 4,466.30
NP-Affiliated	\$ 14,493.13	\$40,700	\$ 38,051.97	\$145,700	\$ 29,109.45	\$ 27,302.09
TOTAL	\$ 33,163.63	\$40,200	\$ 70,208.71	\$118,100	\$ 29,572.61	\$ 51,214.69

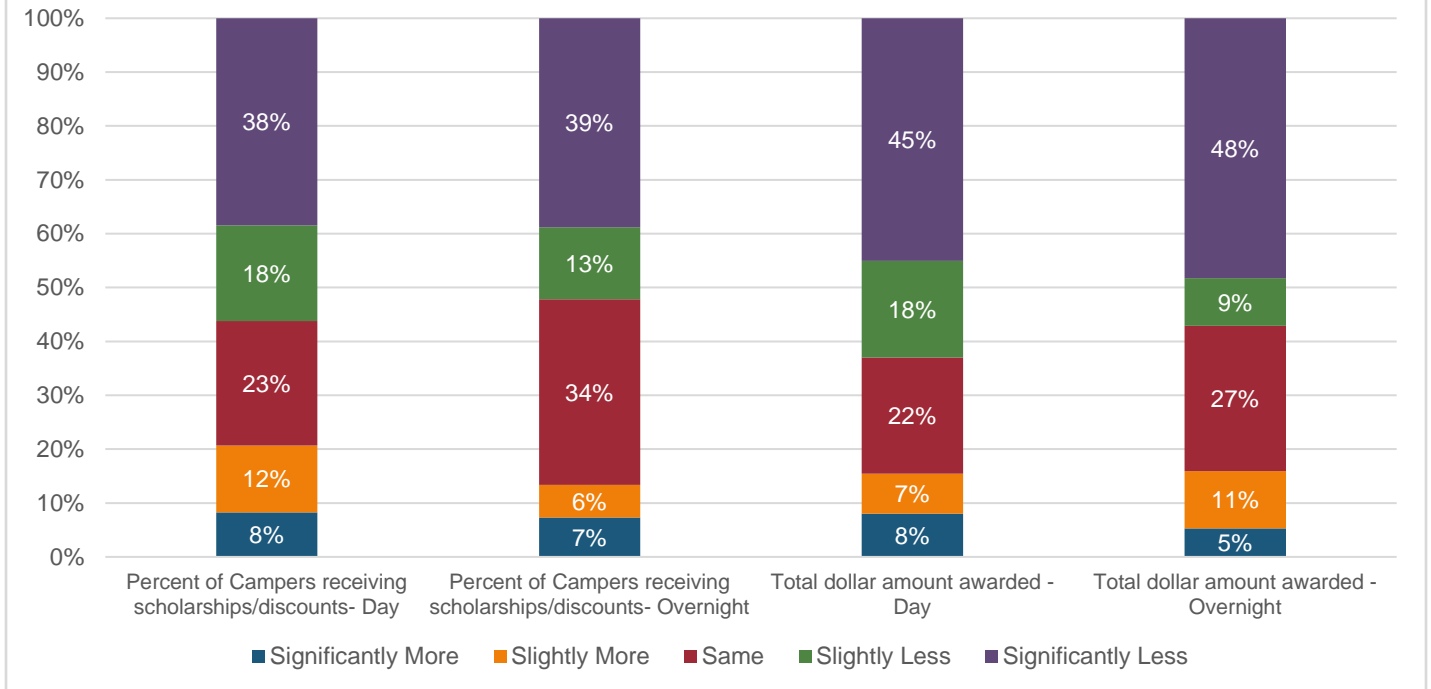
Note: 2017 survey separated "scholarships" from "discounts," so it is possible there is error in comparing 2017 to 2020.

Average Value of Total Scholarships Awarded Per Camp in 2020, by Nonprofit Affiliation

	Day	Overnight	Combo	TOTAL
College or university	\$10,050.00	\$75.00		\$6,725.00
Faith-based organization	\$16,744.45	\$98,117.27	\$14,163.62	\$41,360.17
Health organization		\$725.00		\$725.00
K-12 school	\$22,171.88		\$30,000.00	\$23,041.67
Local, state, or federal government (e.g., public parks & recreation agency)	\$3,725.00		\$72,000.00	\$26,483.33
Other	\$6,257.14	\$8,890.00		\$7,354.17
Youth-serving agency (e.g., YMCA, Girl Scouts, 4-H, CampFire)	\$14,956.78	\$31,027.52	31,388.23	\$25,663.35
TOTAL	\$14,697.94	\$39,023.67	\$24,791.93	\$26,957.27



Change in Need-Based Scholarships/Discounts



N=162 for day camps, N=226 for overnight camps

Open-ended responses to the question “Please describe changes to your 2020 need-based scholarship/discount offerings included examples such as the following:

We could not serve as many low-income students as we would normally. We didn't have the funds for scholarships, and the local school district canceled all camps that would normally have brought in both low-income and more diverse students.

Fees were increased due to state staffing guidelines, therefore families who needed care couldn't afford it and only a limited amount of financial assistance was available.

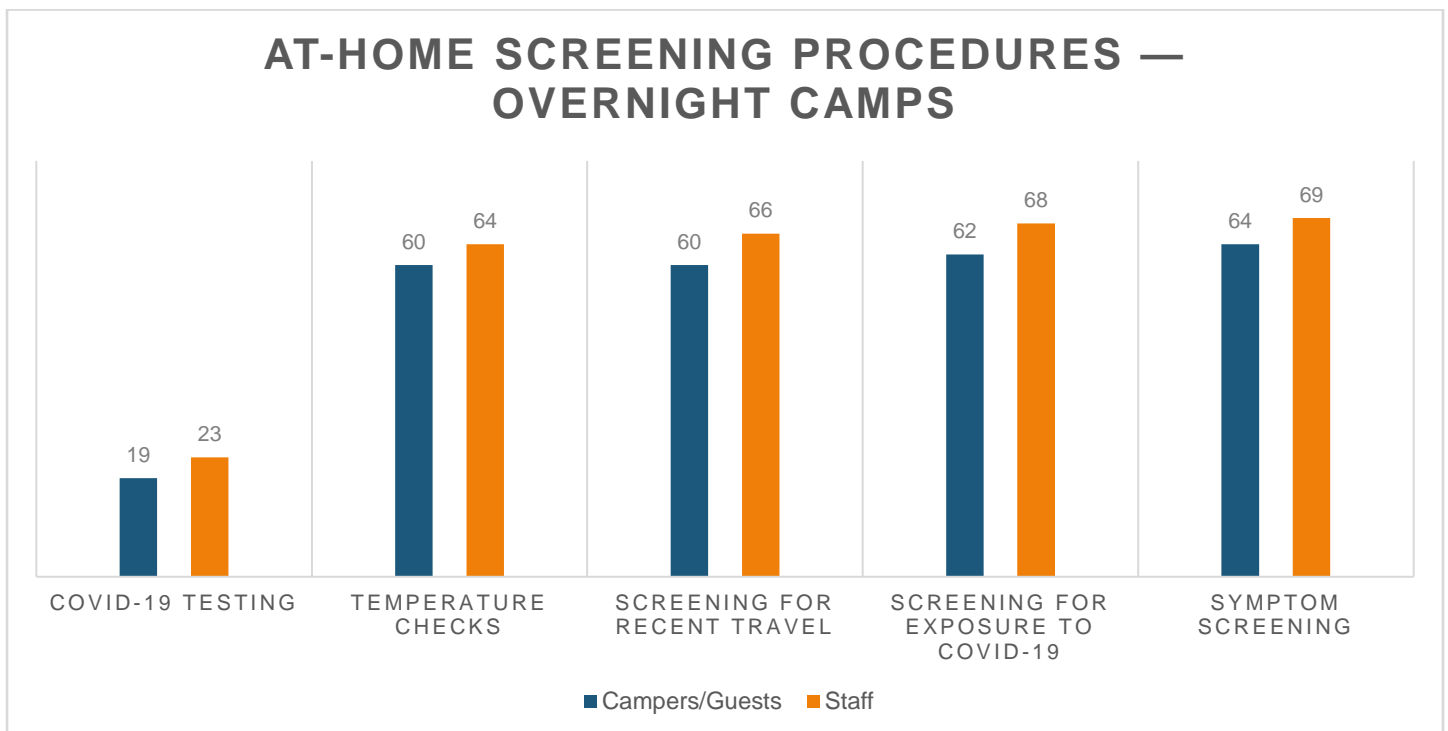
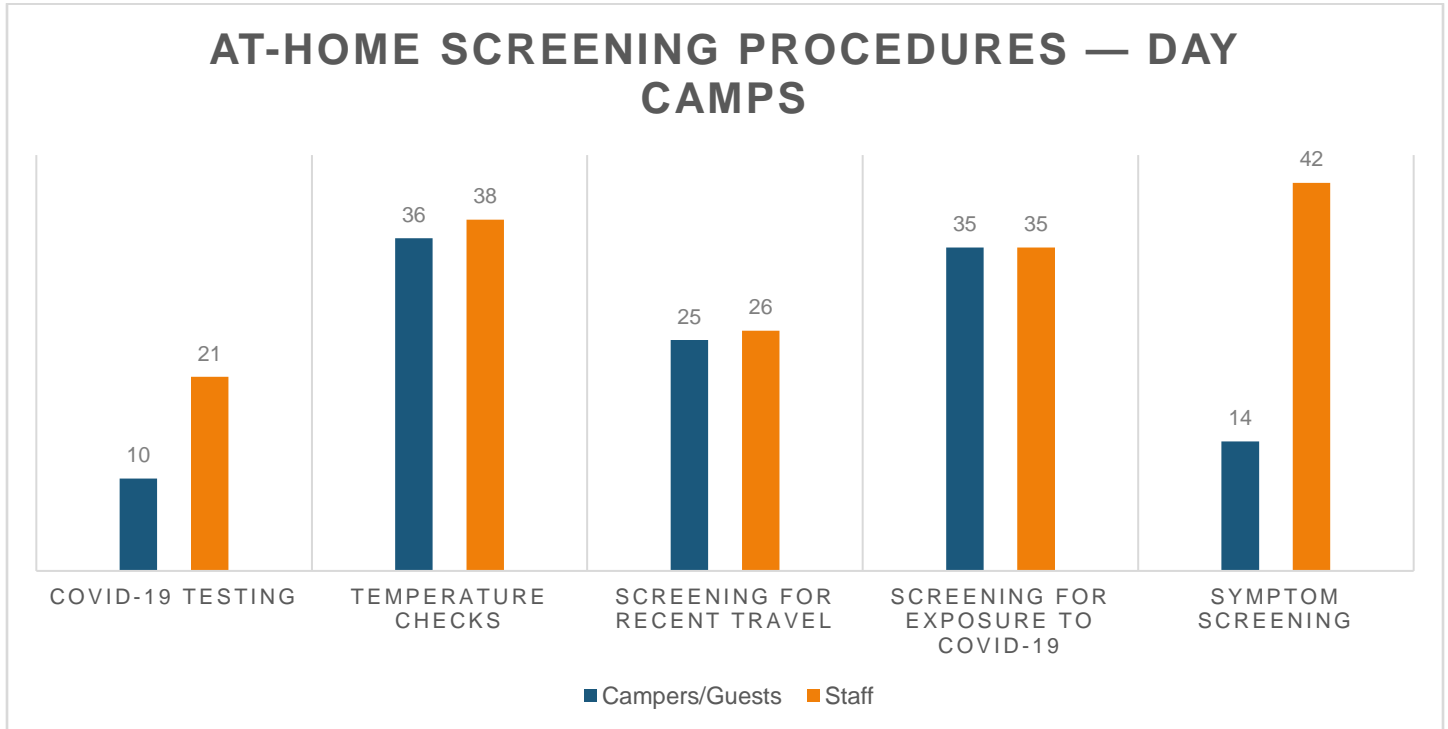
We served less campers in 2020 due to COVID-19. We had three age groups from seven to 12 years old and eliminated ages four to six and 13–16 due to capacity and needs.

Average Total Scholarships Awarded 2017 and 2020, by Sector

	Day			Overnight			TOTAL AVERAGE
	2020	2017	% Change	2020	2017	% Change	
FP	\$28,134.13	\$57,600	-105%	\$83,291.50	\$89,800	-8%	\$64,825.47
INP	\$82,735.10	\$38,200	54%	\$94,656.77	\$158,100	-67%	\$86,491.25
Gov	\$4,466.30						\$4,466.30
NP-Affiliated	\$14,493.13	\$40,700	-181%	\$38,051.97	\$145,700	-283%	\$27,302.09
TOTAL AVERAGE	\$33,163.63	\$40,200	-21%	\$70,208.71	\$118,100	-68%	\$51,214.69

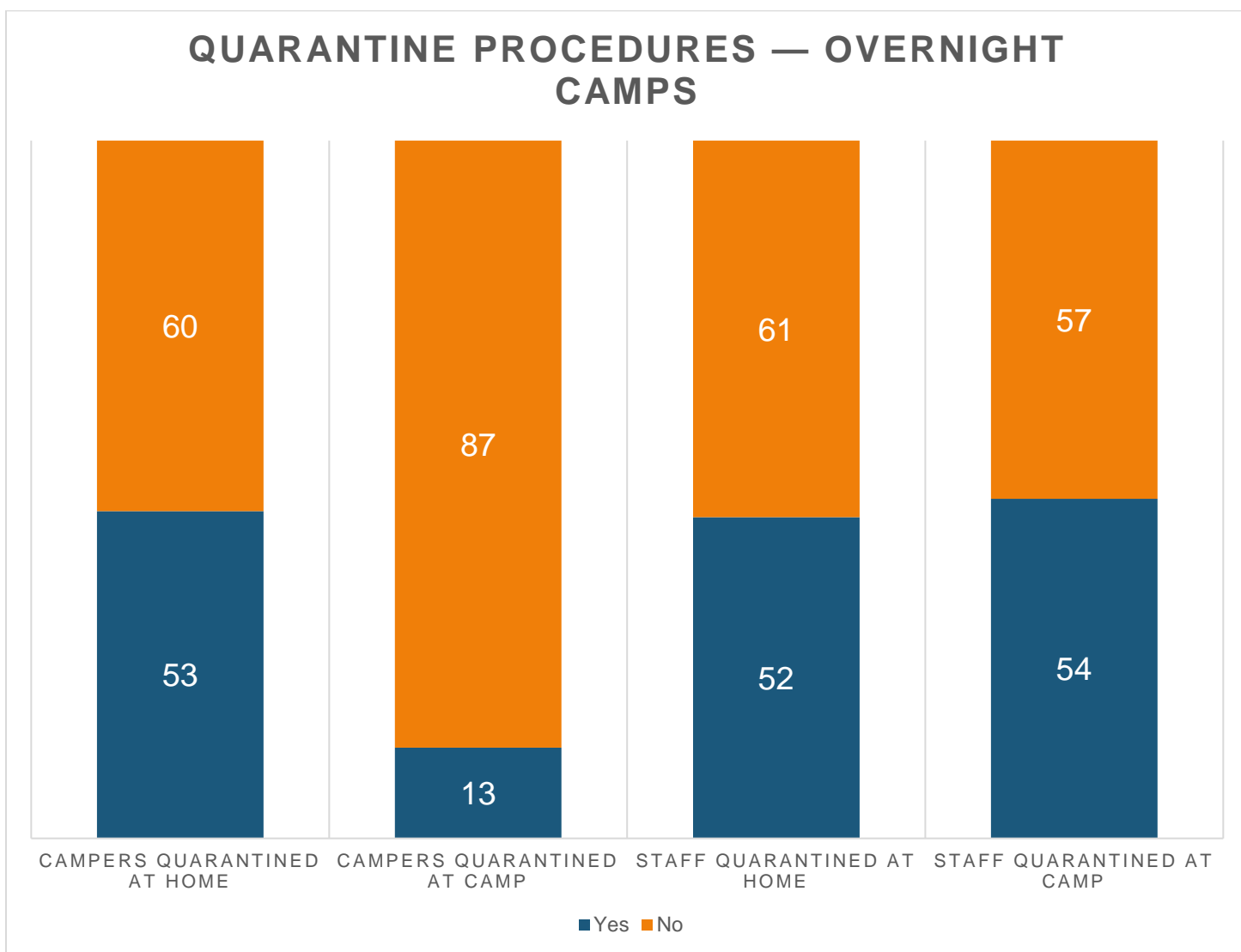
COVID-19 PREVENTION PRACTICES & OUTCOMES

It is difficult to know exactly how many cases happened at camp. It seems from our analysis that potential cases were often identified during pre-camp or start-of-camp screening procedures, and, in these cases, most were sent home. These cases were most likely contracted prior to camp, but may be included in what respondents reported as “confirmed cases.” Overall, our numbers align with data collected on COVID-19 cases from similar organizations, suggesting that in summer 2020, COVID-19 was low in children overall, and the interventions many camps employed appear to have made a difference. What we learned about these interventions are described below.



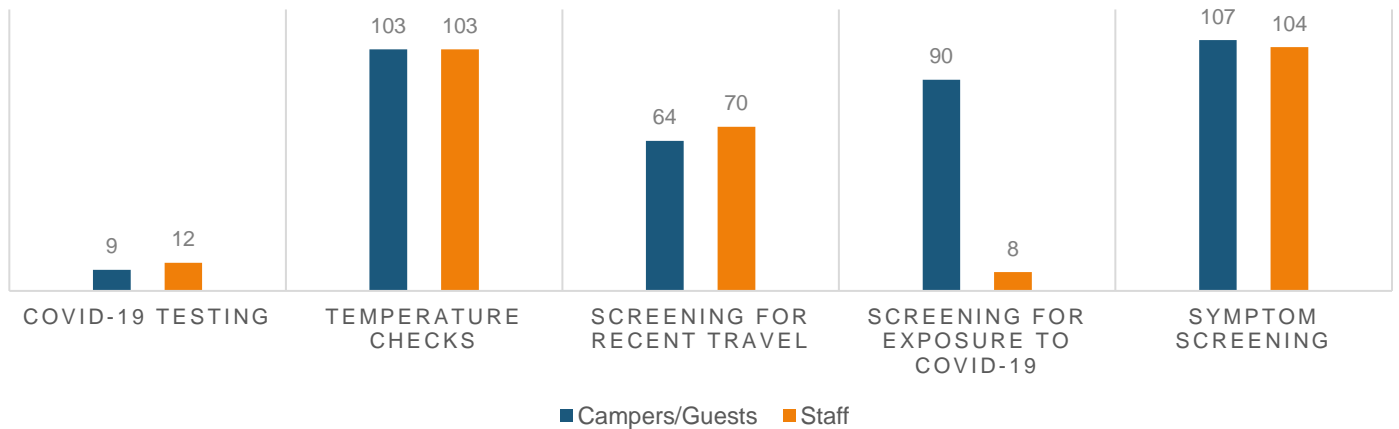
Camps that reported offering in-person programming in Summer 2020 were asked about the details of their screening procedures, specifically, whether they implemented COVID-19 testing, temperature checks, screening for recent travel, screening for exposure to COVID-19, and symptoms screening. Camps were asked to report whether these screening procedures were implemented for campers/guests and staff, and whether they took place at home, upon arrival, and/or on a routine basis. Camps had the option of selecting more than one screening procedure.

For both day and overnight camps, the least commonly reported home screening procedure was COVID-19 testing for both campers and staff. Day camps responding to this question most commonly reported symptom screening staff members (42 responses), closely followed by temperature checks (38 responses) and screening for exposure to COVID-19 (35 responses). Campers, on the other hand, were primarily asked to implement temperature checks (36 responses), screening for exposure to COVID-19 (35 responses), and screening for recent travel (25 responses). Overnight camps reported in almost equal measure for both campers and staff temperature checks (60 responses for campers, 64 for staff members), screening for recent travel (60 responses for campers, 66 for staff members), screening for exposure to COVID-19 (62 responses for campers, 68 for staff members), and symptom screening (64 responses for campers, 69 for staff members). Overall, both day and overnight camps appeared to have stricter at-home screening procedures for staff members compared to campers/guests.

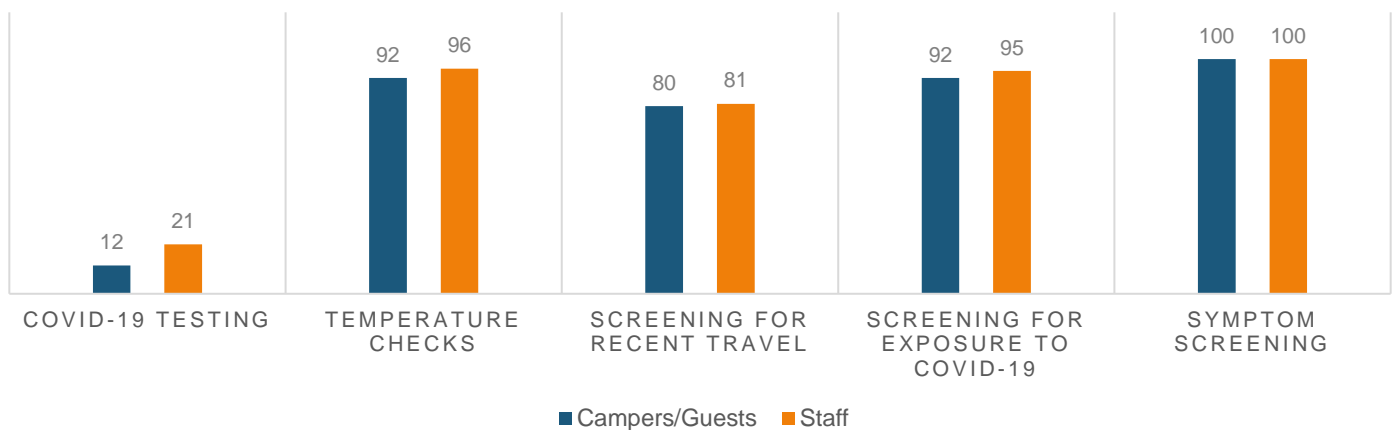


Overnight camps were also asked specifically about their quarantining procedures. The most common responses, in almost equal measure were staff quarantined at camp (54 responses), campers quarantined at home (53 responses), and staff quarantined at home (52 responses). Only 13 camps reported asking campers to quarantine at home.

ARRIVAL SCREENING PROCEDURES — DAY CAMPS



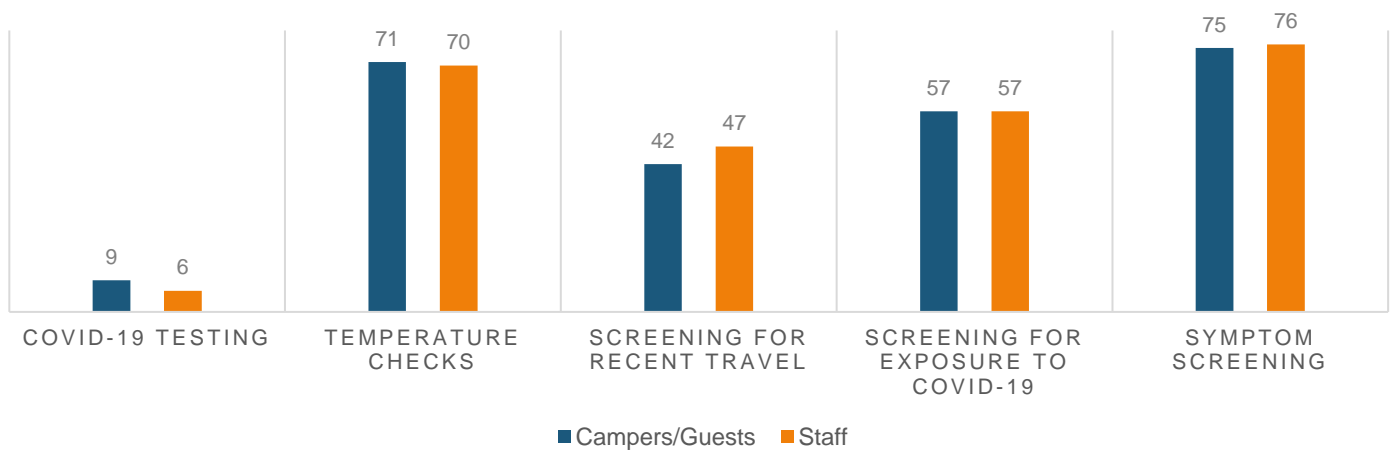
ARRIVAL SCREENING PROCEDURES — OVERNIGHT CAMPS



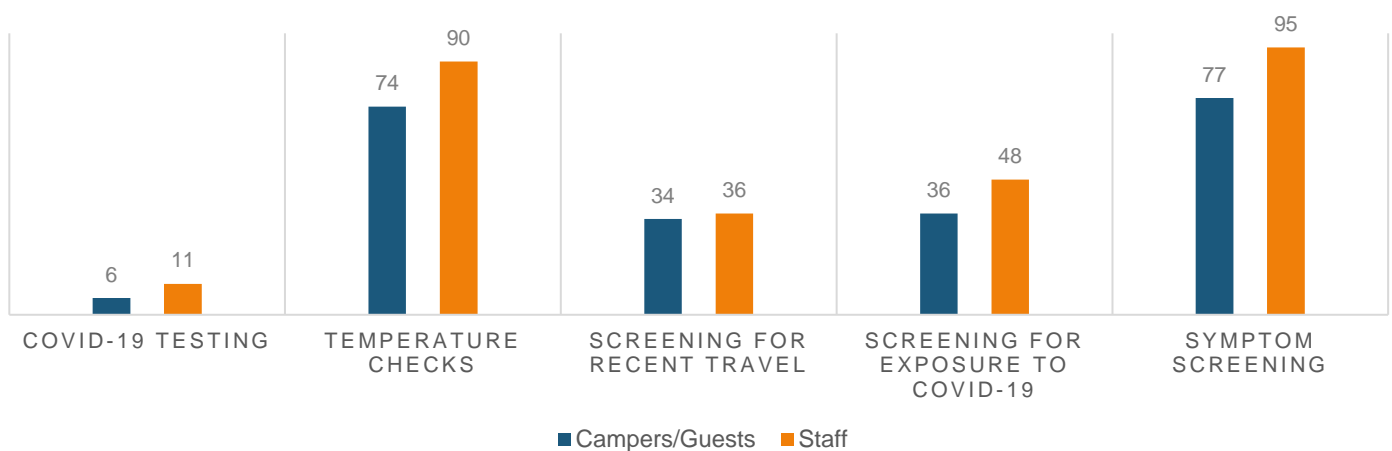
When we asked camps that ran in-person programming in Summer 2020 about the screening procedures implemented upon arrival, very few camps (both day and overnight) reported implementing COVID-19 testing. Day camps responding to this question most commonly reported symptom screening staff members (104 responses) and temperature checks (103 responses), followed by screening for recent travel (70 responses). Very few day camps reported screening staff members for exposure to COVID-19 (8 responses). Campers were similarly commonly asked to undergo symptom screening (107 responses) and temperature checks (103 responses), but were more often screened for exposure to COVID-19 (90 responses), and finally screening for travel (64 responses). Overnight camps responding to this question reported near identical arrival screening procedures for campers and staff, most commonly symptom screening (100 responses for both campers and staff members), followed by temperature checks (92 responses for campers, 96 for staff members) and screening for exposure to COVID-19 (92 responses for campers, 95 for staff members), and finally screening for recent travel (80 responses for campers, 81 for campers). Overall, unlike at-home screening procedures which were reported more often for staff than campers/guests, arrival screening procedures were mostly comparable for staff and campers/guess at both day and overnight camps (the main exception being screening for exposure to COVID-19 at day camps).

We also asked camps with staff arriving at different times throughout the summer to describe how they managed prevention and screening for COVID-19. Most responded with pre-screening questionnaires and check lists, self-screenings, and temperature checks. A small number also indicated implementing various quarantine procedures.

ROUTINE SCREENING PROCEDURES — DAY CAMPS



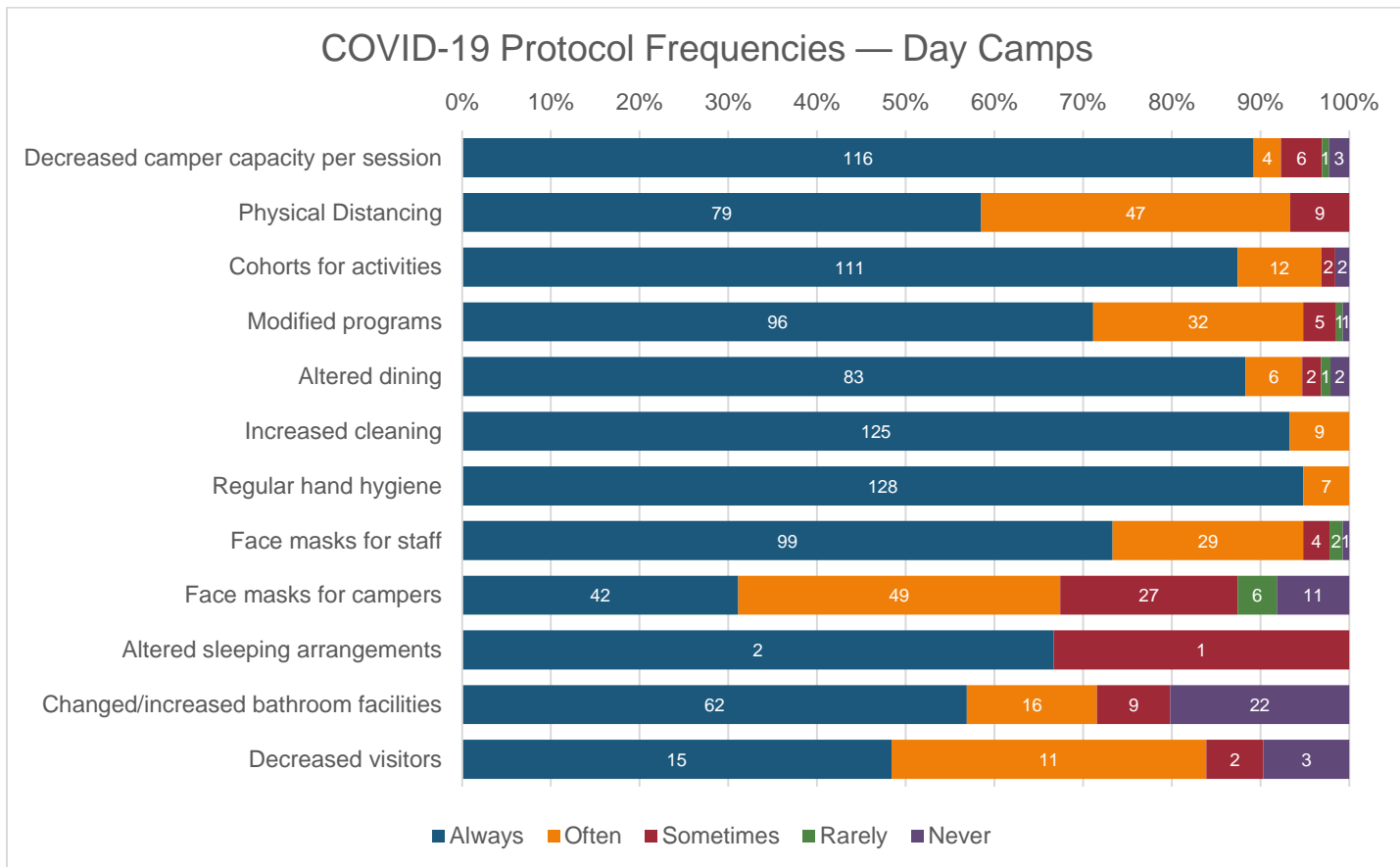
ROUTINE SCREENING PROCEDURES — OVERNIGHT CAMPS



When we asked camps that ran in-person programming in Summer 2020 about the screening procedures implemented on a routine basis, COVID-19 testing was once again the least reported screening procedure for both campers/guests and staff members at both day and overnight camps. Day camps responding to this question reported almost identical routine screening procedures for both campers/guests and staff members. The most commonly reported routine screening procedures were symptom screening (75 responses for campers, 76 for staff members) and temperature checks (71 responses for campers, 70 for staff members), followed by screening for exposure to COVID-19 (57 responses for both) and finally screening for recent travel (42 responses for campers, 47 for staff members). Overnight camps responding to this question were less consistent between campers/guests and staff routine screening procedures, but followed similar trends when compared to day camp routine screening procedures. Staff members most commonly underwent symptom screening (95 responses) and temperature checks (90 responses). Staff members were less commonly routinely screened for exposure to COVID-19 (48 responses) or recent travel (36 responses). This may be due to the fact that staff were commonly staying onsite, therefore limiting potential exposure and travel opportunities. Overnight camp responses pertaining to campers/guests routine screening procedures followed a similar trend to staff routine screening procedures, with fewer overall responses. Again, campers/guests at overnight camps most commonly underwent symptom screening (77 responses) and temperature checks (74 responses), and were less commonly routinely screened for exposure to COVID-19 (36 responses) or recent travel (34 responses). Overall, for both day and overnight camps and campers/guests and staff members alike, the most common routine screening procedure was symptom screening, closely followed by temperature checks.

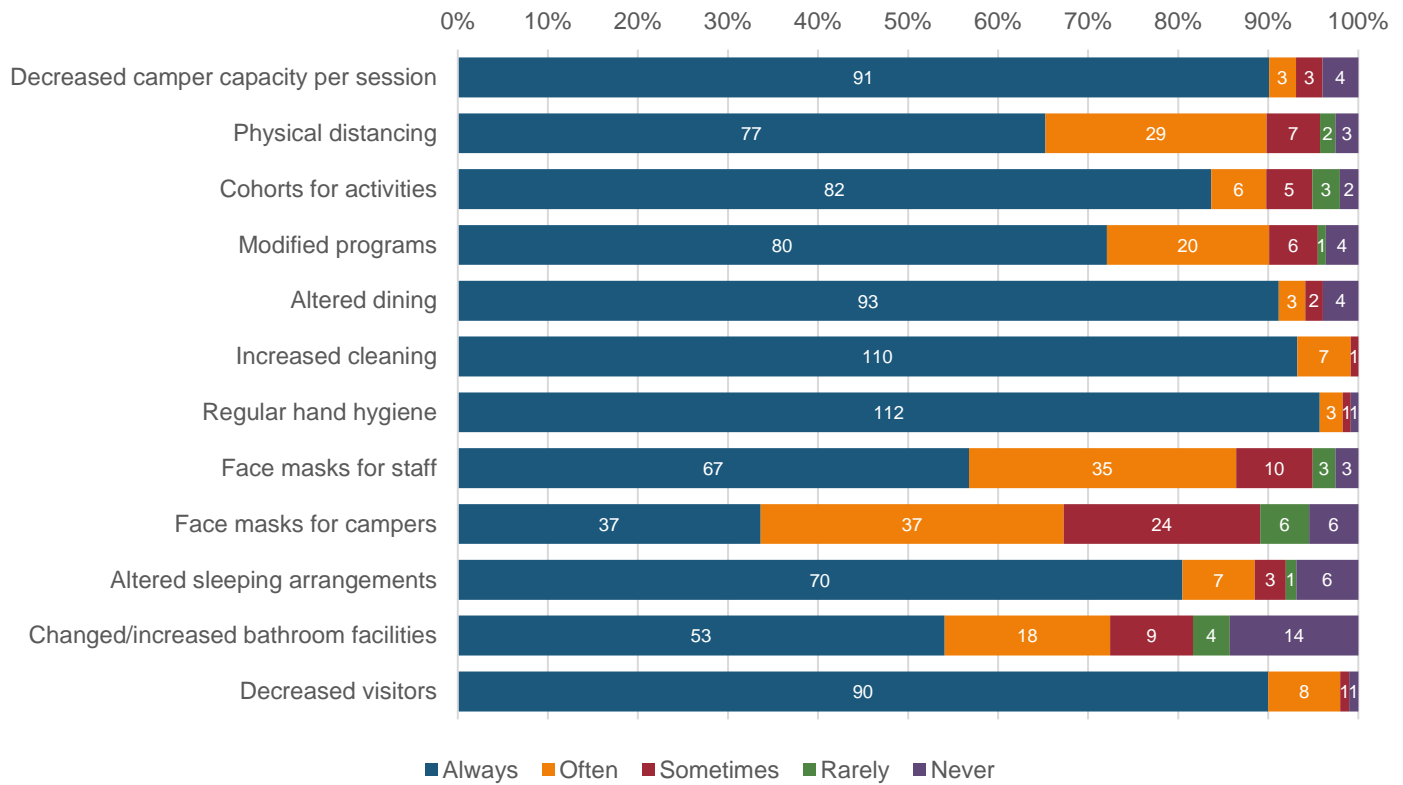
Additional Screening Procedures

We also asked camps that ran in-person programming in Summer 2020 to list any additional COVID-19 screening they did that was not included in the tables above. Responses to this question included calling families to discuss protocols screening, risk tolerances, and their experiences during stay-at-home orders and afterwards. This mirrors screening procedures implemented by a camp director interviewed for ACA’s Camps & COVID qualitative study who noted calling families as one of the most important screening and prevention strategies they implemented because it gave them the opportunity to discuss what their camp defined as quarantine and to remind them “if your child is going to swim practice, then that’s not quarantining.” Several camps reported screening family/household members and sending out screening questionnaires weeks in advance of camp. One respondent indicated testing everyone for antibodies upon arrival.



Camps that ran in in-person programming in Summer 2020 were asked about the frequency (*always, often, sometimes, rarely, never, or N/A or Not Sure*) of numerous COVID-19 protocols and prevention strategies. The most commonly reported protocols and prevention strategies that day camps *always* implemented were regular hand hygiene, increased cleaning, decreased camper capacity per person, and cohorts for activities. These results are consistent with common practices described by day camp directors interviewed as part of ACA’s Camps & COVID qualitative study. Other protocols and prevention strategies that day camps commonly reported always implementing were face masks for staff, modified programs, and altered dining. The most commonly reported protocols and prevention strategies that day camps reported *never* implementing were changed/increased bathroom facilities and face masks for campers.

COVID-19 Protocol Frequencies- Overnight Camps



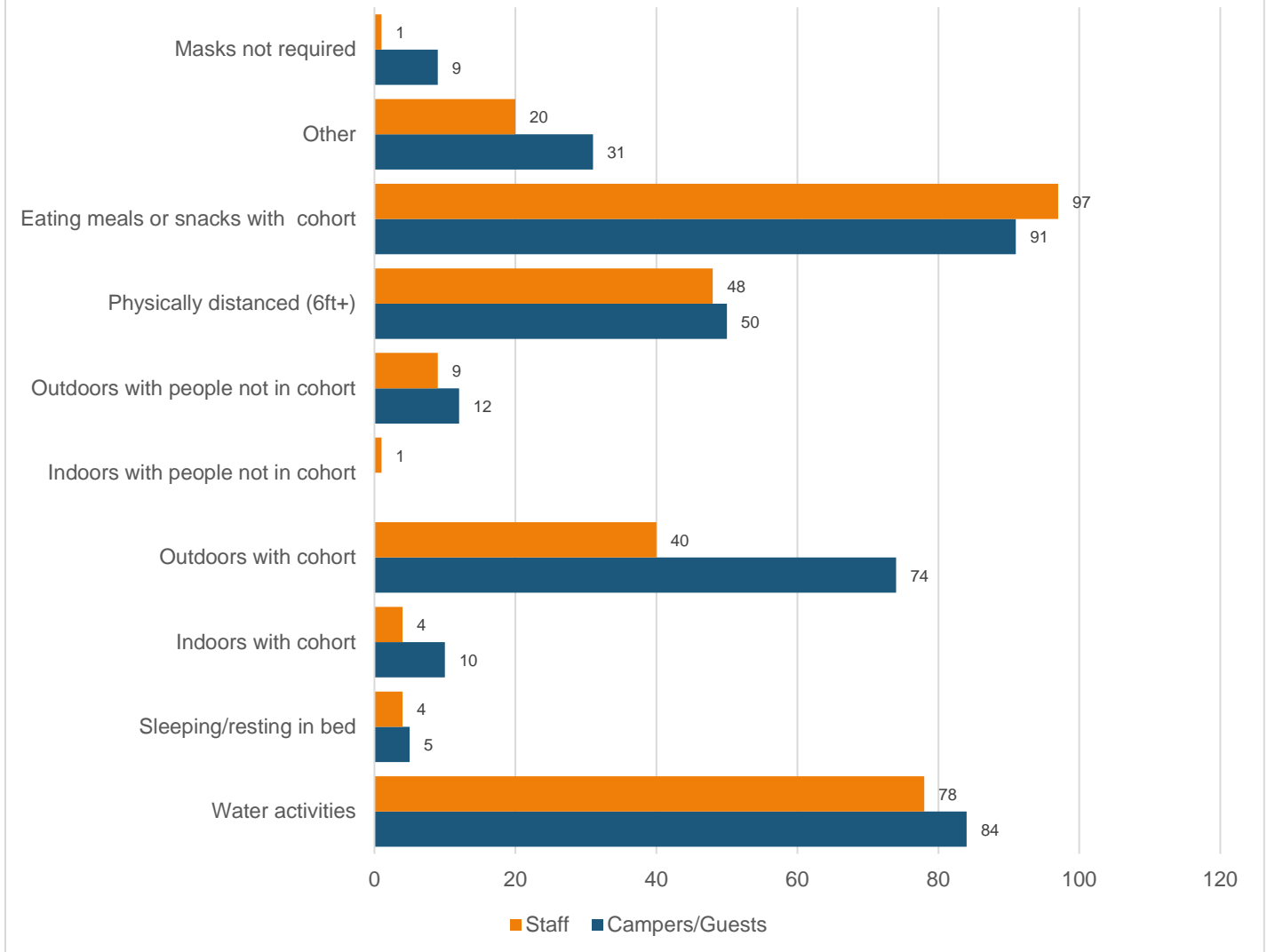
For overnight camps responding to this question, the most commonly reported protocols and prevention strategies that were *always* implemented were regular hand hygiene, increased cleaning, altered dining, decreased camper capacity per person, and decreased visitors. This was consistent with common practices described by day camp directors interviewed as part of ACA’s Camps & COVID qualitative study. Indeed, one overnight camp director noted one of their greatest successes from the summer was integrating these new protocols into their camp culture, sharing the example of having campers sing a camp song while washing their hands. Other protocols and prevention strategies that overnight camps commonly reported always implementing were cohorts for activities, modified programs, and physical distancing. The most commonly reported protocols and prevention strategies that day camps reported *never* implementing were face masks for campers and face masks for staff.

Camper Cohort Sizes by Program Type

Camp Type	Min	Max	Mean	Median
Day Camps	0	50	10.98	10
Overnight Camps	0	80	12.87	10
Combo Camps	0	100	9.04	7

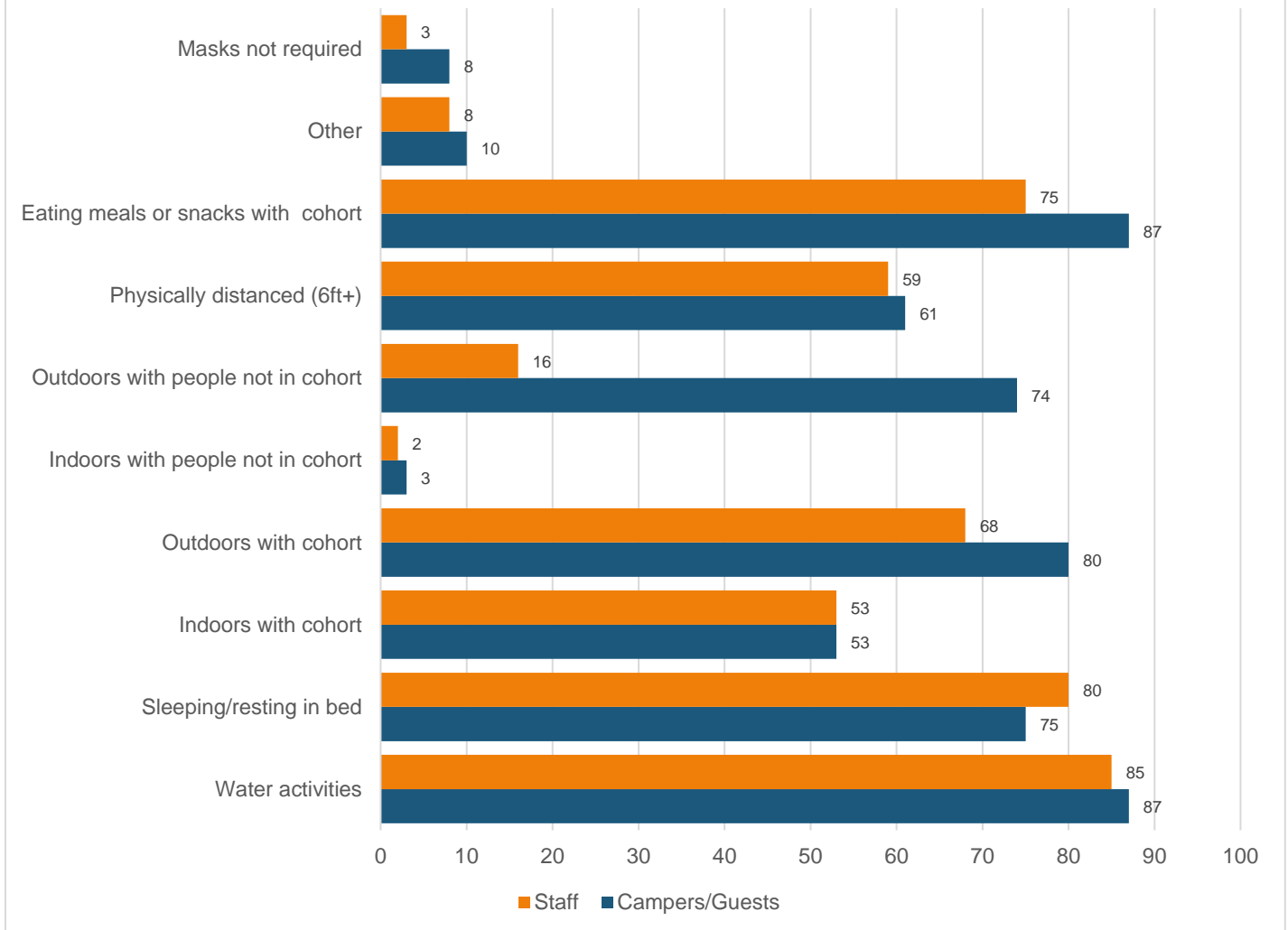
While the reported cohort sizes for day, overnight, and combo camps were extremely variable, ranging from 0-100 campers/guests, the mean range of 9.04-12.87 and median range of 7-10 suggest that the most typical camper cohort size for Summer 2020 in-person programming was probably between 7-13 campers, on average.

Mask/Face Covering Protocols MASKS NOT REQUIRED — Day Camps, *select all that apply*, 102 responses



Camps that ran in in-person programming in Summer 2020 were asked to report when campers/guests and staff members were allowed to remove masks/face coverings. Overall, at day camps, campers were more often reportedly allowed to remove masks/face coverings, namely for eating meals or snacks with their cohort (91 responses), water activities (84 responses), and when outdoors with their cohort (74 responses). Staff members were also commonly allowed to remove masks/face coverings for eating meals or snacks with their cohort (97 responses) and water activities (78 responses). No camps reported allowing campers/guests to remove masks/face coverings when indoors with people not in their cohort, and only one reported allowing staff members to do so. Nine day camps reported not requiring masks of campers, and only one reported not requiring masks for staff members.

Mask/Face Covering Protocols MASKS NOT REQUIRED —
Overnight Camps, *select all that apply*, 124 camper responses, 125
staff responses



Overall, similar to day camps, overnight camps more often reported allowing campers to remove masks/face coverings. Most commonly, overnight camps reported allowing campers to remove masks/face coverings while eating meals or snacks with their cohort and during water activities (87 responses each), and when outdoors with their cohort (80 responses) and when sleeping/resting in bed (75 responses). Staff members were most commonly allowed to remove masks/face coverings during water activities (85 responses) and when sleeping/resting in bed (80 responses). Again, very few camps allowing campers/guests and staff members to remove masks/face coverings when indoors with people not in their cohort. Eight overnight camps reported not requiring masks of campers, and three reported not requiring masks for staff members.

While the majority of camps responding to this survey did not have any actual or suspected cases of COVID-19 on site during summer 2020, a very small number did. Of those who reported at least one suspected case, when asked about their healthcare procedures regarding individuals presenting with COVID-19 symptoms, the most commonly reported procedure was to notify the parents of the person with the symptoms (if they were a minor). Many overnight camps also reported assessing symptoms and isolating the individual at camp.

Additional procedures included: closing one site early; immediate pick up from camp exclusion from camp until a negative test could be provided, quarantine completed and/or released by health department or county nurse; sent home until the suspected case could be confirmed either way, and being sent home for 14 days.