

# The Economic Impacts of the Greater Pocono Summer Camp Industry



Prepared for:

**The Pennsylvania Camp Association**

by:

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(Assisted by Wayne County Planning Department)*

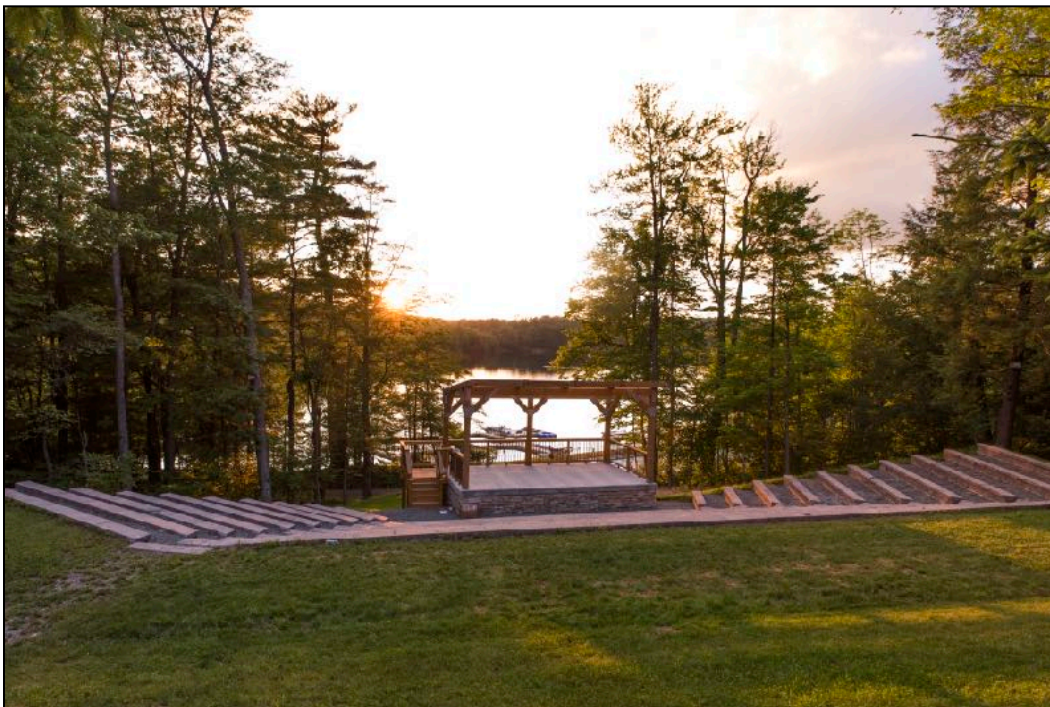
May 2023

## Acknowledgments

The consultants and the Boards of Directors of the Wayne County Camp Alliance, the Greater Pocono Camp Association and the Pennsylvania Camp Association wish to thank all those who participated in and supported this economic impact study. This includes the members of these groups, alumni, employees, parents and vendors who all completed surveys.

The Wayne County Planning Department also generously assisted with data collection and mapping as a major contributor to this report. The report could not have been completed without its help.

We strongly urge this report be widely disseminated to as many officials and citizens affected counties of the Commonwealth as well as others to demonstrate the astonishing impact of the camp industry on both the economy and quality of life of Pocono life, not to mention the children who attend camp here.



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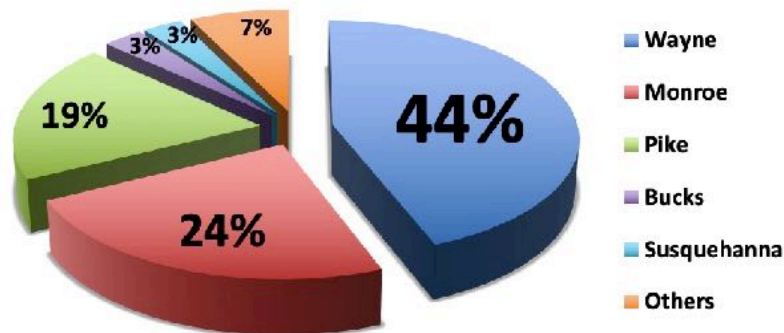


# The Economic Impact of the Greater Pocono Summer Camp Industry

## Summary of Key Findings

Here are key findings from surveys of the Pocono summer camp industry, which were answered by 39 camping organizations, 394 camp employees, 363 parents, 215 alumni and 41 vendors.

### Greater Pocono Region Summer Camps by County



The results have been supplemented with objective data from such sources as the Bureau of Economic Analysis and the Wayne County Planning Department.

#### ***Camps are businesses with staying power***

*The average camp has been a mainstay of the Greater Pocono economy for more than 69 years.*

#### ***Camps preserve valuable open space***

*Just those 39 camps responding to the survey represented over 15,000 acres of largely open land. The average camp is approximately 385 acres in size and uses 168 acres in operations, the remainder being preserved as open space.*

#### ***Camps are major businesses***

*The average camp spends over \$4.2 million on operations, some 23% of it regionally. The total direct and indirect impact on the regional economy is an estimated \$250.7 million annually.*

#### ***Camps make major investments regionally***

*Greater Pocono Region summer camps invested an average of \$2.5 million to improve their facilities over the last five years. Based on surveys, it is anticipated Greater Pocono Region camps as a whole will, going forward, spend \$41 million per year upgrading those facilities.*



# The Economic Impact of the Greater Pocono Summer Camp Industry

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## **Camps are large taxpayers**

Greater Pocono Region camps paid almost \$9.1 million in property taxes in 2022. The average taxpaying camp paid over \$133,000 in local property taxes. Numerous camps pay over \$200,000 in county, municipal and school taxes. Six out of 10 pay more than \$100,000 in taxes annually. They also pay as much as 25% of all taxes in some communities.

## **Camps are excellent employers**

Some 72% of camp employees are from the U.S. and 20% of those are from Pennsylvania. Importantly, 79% of camp employees rate their level of job satisfaction as “excellent” with another 17% giving a “good” rating. Reasons cited included enjoyment of the work (79%), its seasonal nature (43%), opportunity for advancement (19%) and level of pay (11%).

## **Camps buy local**

Camp employees indicated that, among their first, second and third choices for local purchases, were: Honesdale (52%), Scranton (19%), Hancock (16%), Hawley (13%), Stroudsburg (12%) and Lakewood (11%) businesses. These purchases included \$141,400 per camp in food expenditures, for example, some 26% of all food purchases. It also included \$359,177 per camp in payroll paid to local employees, \$118,524 in local utility expenses and \$128,732 for local services.



## **Vendors value camp business**

Vendors surveyed indicated they served an average of 27 camps (14 camps when large national vendors are excluded) and did an average of \$467,292 in summer camp business (\$143,006 for other than large nationals).

## **Camps are quality businesses and representatives of the area**

Some 65% of camper parents rated the facilities used by their children as “excellent” and another 28% rated them as “Good.” Reasons included quality of programs (cited by 82%), quality of the facilities (55%), quality of the location (33%), religious affiliation (21%) and value of the camp package (17%).

## **Camps create other tourism**

Some 56% of camper parents stated that visiting the camp made them want to visit the area for other reasons. While visiting the area, camper parents spent an average of \$412 per day in the region on lodging, dining and other services.

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## ***Camps introduce investors to the area***

*Some 17% of camper parents stated that visiting the camp made them want to consider investing in the area and 18% also said visiting the camp made them want to move to or acquire a second home in the region. Some 36% of alumni felt the same way about investing and 31% would be interested in moving to or acquiring a second home in the region.*

## ***Camp alumni value their camp experience very highly***

*The survey of summer camp alumni also reveals 99% of these individuals felt their summer camp experience was a defining moment in their lives. A total of 94% indicated their own camping experience gave them a better appreciation of the outdoors and rural life.*



*Some 92% said this experience led to them wanting to send their own children to summer camp to experience the same things they did and 86% stated that experience led to them becoming a counselor or other employee at the camp in later life. Over 90% were impressed with the investments and improvements made at their camp and 87% said summer camp made them want to come back to the region to visit in later life.*

## ***Camps, their patrons and the businesses that serve them were heavily impacted by COVID***

*The survey of vendors indicated 60% experienced a major or serious negative impact from camps not being able to open during the extended COVID lockdown period.*

*Summer camps indicated they suffered an average loss of \$7,809,372 in gross revenue and \$2,474,760 in net revenue for the 2020-2022 period due to COVID and associated lockdowns and restrictions. Capital expenditures declined by an average of \$897,834 for the period and payroll was reduced by \$857,643 on average.*



# The Economic Impact of the Greater Pocono Summer Camp Industry

## Greater Pocono Summer Camp Locations by Municipality

### Susquehanna County:

- Ararat

### Wayne County:

- Berlin
- Buckingham
- Canaan
- Clinton
- Damascus
- Dyberry
- Lebanon
- Manchester
- Oregon
- Paupack
- Preston
- Scott

### Luzerne County:

- Dennison

### Pike County:

- Blooming Grove
- Delaware
- Dingman
- Greene
- Lackawaxen
- Palmyra
- Scott

### Carbon County:

- Lower Towamensing

### Monroe County:

- Barrett
- Chestnuthill
- Jackson
- Middle Smithfield
- Pocono
- Polk
- Stroud

### Bucks County:

- Nockamixon
- Tinicum

### Berks County:

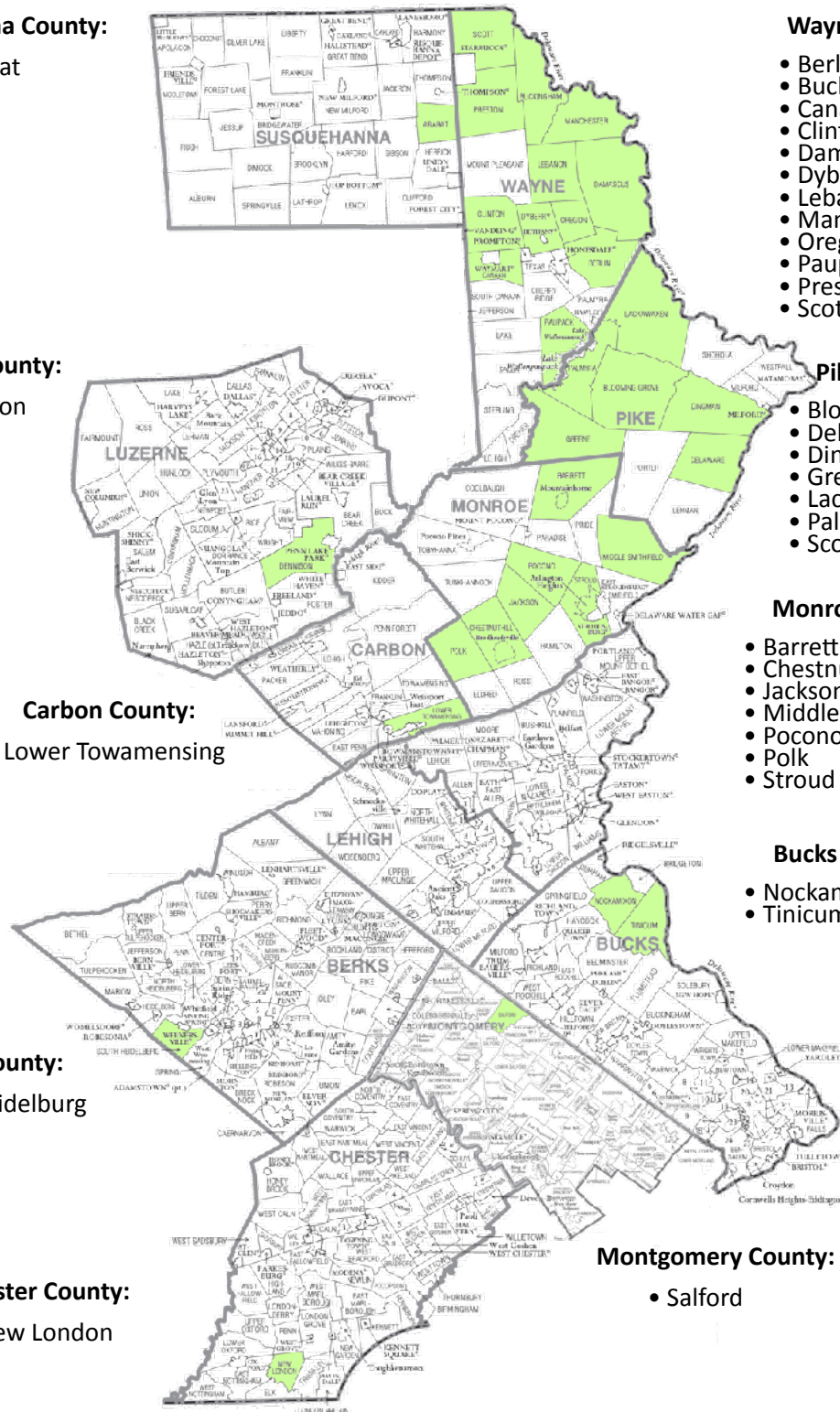
- South Heidelberg

### Chester County:

- New London

### Montgomery County:

- Salford



# The Economic Impact of the Greater Pocono Summer Camp Industry

Greater Pocono Region Summer Camps			
No.	Camp	Municipality	County
1	South Mountain YMCA Camp	South Heidelberg	Berks
2	Camp Nock A Mixon	Nockamixon	Bucks
3	Camp Onas	Tinicum	Bucks
4	Blue Mountain Adventures Camp	Lower Towamensing	Carbon
5	Camp Saginaw	New London	Chester
6	Camp Kresge YMCA	Dennison	Luzerne
7	Camp Canadensis	Barrett	Monroe
8	Pocono Plateau Camp	Barrett	Monroe
9	Spuce Lake Wilderness Camp	Barrett	Monroe
10	Camp Jay Cee	Chestnuthill	Monroe
11	Golden Slipper Camp	Jackson	Monroe
12	International Gymnastics Camp	Jackson	Monroe
13	International Sports Training Camp	Jackson	Monroe
14	Mt. Gilead Camp	Jackson	Monroe
15	Pinemere Camp	Jackson	Monroe
16	Pocono Trails Camp	Jackson	Monroe
17	Streamside Camp	Jackson	Monroe
18	Twin Pines Camp	Jackson	Monroe
19	Pocono Springs Camp	Middle Smithfield	Monroe
20	Camp Lindemere	Pocono	Monroe
21	Camp Harlam	Polk	Monroe
22	Camp Dora Golding	Stroud	Monroe
23	Camp Green lane	Salford	Montgomery
24	Camp Timber Tops	Blooming Grove	Pike
25	Camp Speer YMCA	Delaware	Pike
26	Cedar Lake Camp	Dingman	Pike
27	Camp Nah-Jee-Wah	Dingman	Pike
28	Round Lake Camp	Dingman	Pike
29	Camp Netimus	Dingman	Pike
30	Camp Havaya	Greene	Pike
31	Camp JRF	Greene	Pike
32	Camp Lee Mar	Lackawaxen	Pike
33	Lake Greeley Camp	Lackawaxen	Pike
34	Lake Owego Camp	Lackawaxen	Pike
35	Pine Forest Camp	Lackawaxen	Pike
36	Camp Oneka	Palmyra	Pike
37	Camp Chen-A-Wanda	Ararat	Susquehanna
38	Camp Tioga	Ararat	Susquehanna
39	Camp Moshava	Berlin	Wayne
40	Chestnut Lake Camp	Berlin	Wayne
41	Trails End Camp	Berlin	Wayne
42	Camp Lavi	Buckingham	Wayne
43	Camp Lohikan	Buckingham	Wayne
44	Camp Morasha	Buckingham	Wayne
45	Camp Ramah in the Poconos	Buckingham	Wayne
46	Camp Starlight	Buckingham	Wayne
47	Camp Wayne for Boys	Buckingham	Wayne
48	Perlman Camp	Buckingham	Wayne
49	Camp Ladore	Canaan	Wayne
50	Camp Bonim	Clinton	Wayne
51	Tyler Hill Camp	Damascus	Wayne
52	Camp Cayuga	Dyberry	Wayne
53	Camp Raninu	Lebanon	Wayne
54	Camp Towanda	Lebanon	Wayne
55	Seneca Lake	Lebanon	Wayne
56	Summit Camp	Lebanon	Wayne
57	Camp IHC	Manchester	Wayne
58	Camps Equinunk & Blue Ridge	Manchester	Wayne
59	Bryn Mawr Camp	Oregon	Wayne
60	Goose Pond BSA Reservation	Paupack	Wayne
61	Camp Nesher	Preston	Wayne
62	Camp Poyntelle/Lewis Village	Preston	Wayne
63	Camp Weequahic	Preston	Wayne
64	Camp Westmont	Preston	Wayne
65	Camp Zeke	Preston	Wayne
66	Independent Lake Camp	Preston	Wayne
67	Camp Wayne for Girls	Preston	Wayne
68	Island Lake Camp	Scott	Wayne

# The Economic Impact of the Greater Pocono Summer Camp Industry

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## 1.0 Study Background and Methodology

The Pocono Camp industry is one of the region's most valuable assets. It contributes in several ways to drive the County economy. This study, an update of three earlier reports, was undertaken in 2022/23 and reveals the full extent of those contributions. It was accomplished in consultation with the Pennsylvania Camp Association (PACA), the Wayne County Camp Alliance and the assistance of the Wayne County Planning Department on mapping and certain data collection aspects of the project.

Surveys of member camps, parents and employees of the various camps were done by questionnaire. Additional information from the Bureau of Economic Analysis, US Department of Commerce and other sources was also compiled by Shepstone Management Company, which is responsible for analysis and conclusions contained in this report. Both members and non-members of PACA and the Wayne County Camp Alliance membership were surveyed.



Some 39 camping organizations, 394 camp employees, 363 parents, 215 alumni and 41 vendors responded. Copies of the survey forms used are attached as Appendices to this report.

An earlier study of the economic impact of the Wayne County camp industry was undertaken by the Economic Development Council of Northeastern Pennsylvania (now called the Northeastern Pennsylvania Alliance) in 1975. An update was done by Shepstone Management Company in 2002 followed by another in 2016 that broadened the geographic scope to include Monroe County camps. This 2023 update again evaluates the entirety of the Pocono camp industry.



# The Economic Impact of the Greater Pocono Summer Camp Industry

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Like any other economic sector, the Pocono camp industry produces both direct and indirect impacts on the area. Both were studied as part of this project. Direct impacts reflect the immediate contributions the local economy receives from camping in the form of jobs created, income received and expended to vendors and taxes contributed.

Indirect impacts are those that are expressed through income being recycled throughout the Pocono economy several times as the original monies generated are re-spent on goods and services purchases. Some portion of those funds stay within the area as they are re-spent and this is what is commonly known as the multiplier effect. These impacts extend to income, jobs and total output and support the local economy throughout the year. They also contribute to the economic health of the region and the Commonwealth of Pennsylvania as a whole.



Given this background, the purposes of this study were to:

1. Demonstrate the direct and indirect impacts of the camp industry on the Pocono region.
2. Promote the voice of the industry with local officials, the General Assembly of Pennsylvania and the U.S. Congress.
3. Document the added value that camps contribute to the area economy and quality of life.

The following sections detail the results of the surveys conducted, analyzing this and other information to draw conclusions in these regards and offer recommendations.

# The Economic Impact of the Greater Pocono Summer Camp Industry

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## 2.0 Overview of the Summer Camping Industry

The summer camp industry has existed in Greater Poconos Area of Pennsylvania for well over a century. It is a specialized industry found in relatively few other areas of the country. There are other summer camps in the Adirondacks, Maine, the Berkshires, the Midwest and West but Greater Pocono area camps, spread over 10 counties (mostly in Northeast Pennsylvania but as far south as Chester) are unusual in two respects. They tend to be full season operations and some have a strong religious component. This makes the industry a particularly good niche industry for the Greater Poconos.

Close proximity of these counties to metropolitan areas to the east is a valuable asset for Greater Pocono region camps and has permitted the pursuit of new markets. Many camps, for example, now run post-camp programs of a sporting or other special nature with appeal to broader markets. Some camps also offer shorter camping seasons that make the summer camp experience more affordable and allow repeat use of facilities over a slightly longer season. Numerous camps rent out their facilities for off-season events and some have built entirely new businesses around this.



Like all industries, camping has evolved over the years. Internet marketing is now standard. Whole new experiences have been created for campers, including “writing camp,” for instance



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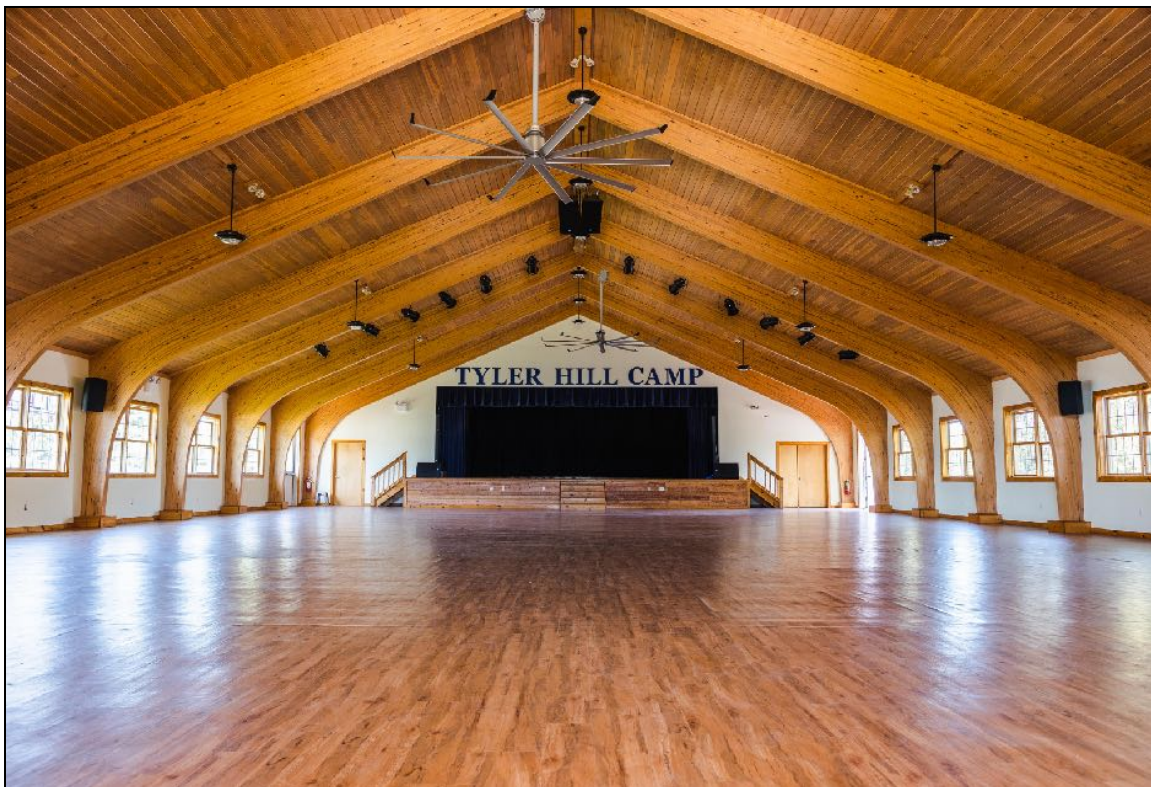
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and audio visual programs. More parents than ever tour camps and evaluate them before making their choice, and the competition for campers has created ever better experiences. Parents also generally visit more often and are looking for complementary experiences of their own, including quality restaurants and lodging. The client base, in other words, is one of very high expectations and camp owners have to continually upgrade and add to their programs to meet those expectations.

The region's camps are, accordingly, doing well and have created great prospects for continued future growth as they have invested majorly in their facilities in recent years. Lodging choices for parents have also improved in many respects and there are new entertainment and cultural opportunities to complement camping visits (e.g., a casino and world-class waterparks in Monroe County and the Bethel Woods performing arts center and concert venue in nearby New York State).

Camping is an extremely important industry to the region. **It pays over 2.2% of all Wayne County property tax bills without generating any school costs**, which is always the primary expense of local government. No other commercial or industrial classification (except electric utilities) exceeds its tax contributions.

Preserving and further developing the industry should be a goal of every Greater Poconos municipality. This report is intended to set the stage for such a continuing effort.



# The Economic Impact of the Greater Pocono Summer Camp Industry

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## 3.0 Pocono Camp Characteristics

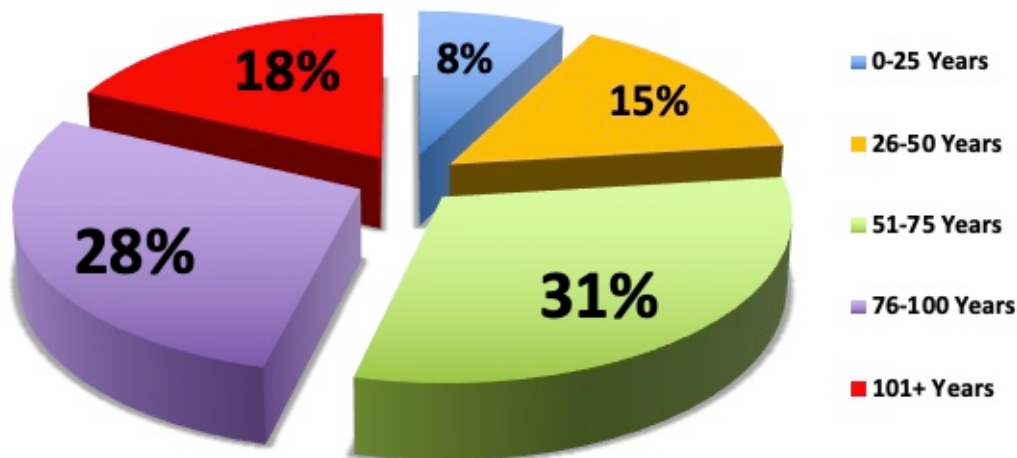
The regional summer camp industry has had a vital economic impact. It is a significant job producer, a supporter of community life and a positive tax revenue producer. It is, too, a conservator of land that is valuable open space to the region. It connects the region to an outside income base, allowing it to import revenues from campers, alumni, employees, parents and other sources in the metropolitan area to the benefit of residents.

The map found in the “Summary of Key Findings” demonstrates locations of summer camps within the Greater Poconos region as a whole. Many municipalities have camps located within their borders, particularly those north of Honesdale. Nearby communities in Monroe, Pike and Susquehanna Counties also include several camps, most of whom are members of the Pennsylvania Camp Association. These, too, were surveyed for this study along with several other camps in Luzerne County and Southeast Pennsylvania. There are, in addition, a number of other camps who are not members of the Association but make the same types of contributions to the economy. Camping, as a result, has a much larger presence in the region than Camp Association numbers alone might indicate.

**Most camps have been in existence for many years (an average of 69.5 years), with some 77%, of the camping organizations having existed for more than 50 years and 18% for more than a century.**

This business longevity is highly unusual in any industry and speaks volumes about the strength of camping. As a particularly well established industry, it provides a solid resource and asset base for the County. It helps supports many other sectors of the economy including governmental, private and nonprofit.

### Camps by Years in Business

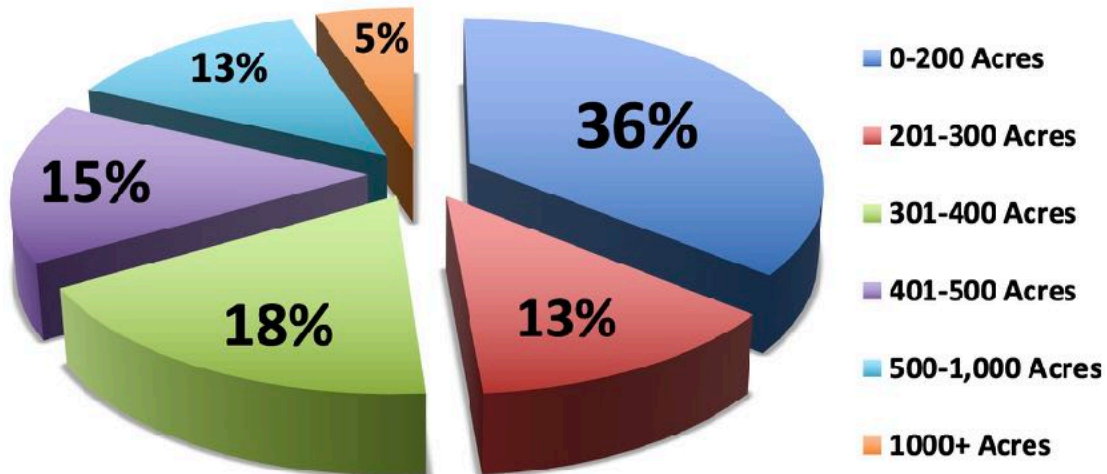


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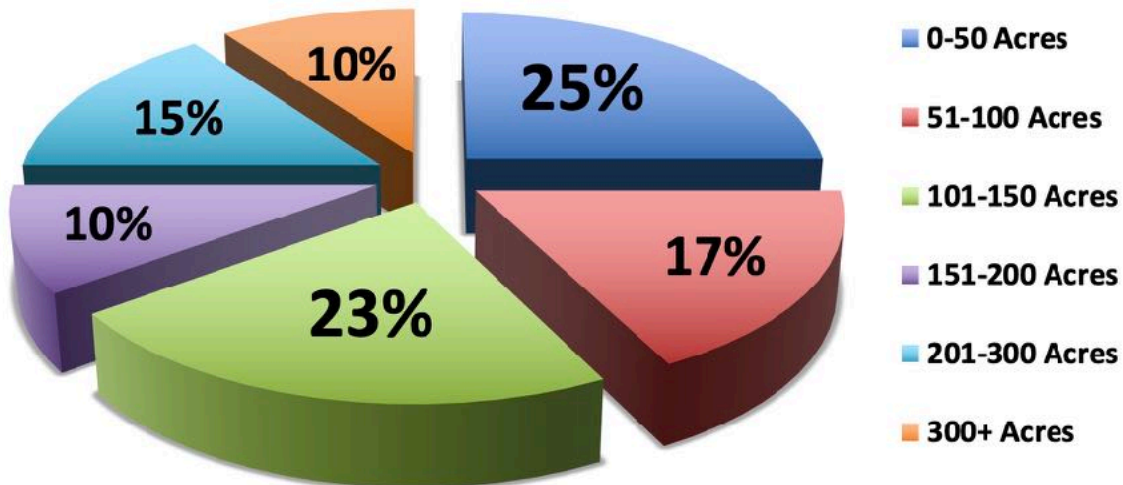
The camp industry uses a great deal of land and maintains large open spaces in many instances. Some camps are more than 1,000 acres in size, 18% are more than 500 acres and 51% are more than 300 acres. The average camp size is 385 acres. Obviously, the more acreage involved, the more opportunities there are for future camp expansion and the more land that is protected as valuable open space within the community.

### Total Camp Land Areas



Land use data indicates much of the acreage currently held by camps is not directly used in their operations. Such acreages range from 5 to 700 acres. The average amount of land used in direct operations is 168 acres, leaving 217 acres, on average, as open space.

### Camp Land Areas Used in Operations





# The Economic Impact of the Greater Pocono Summer Camp Industry

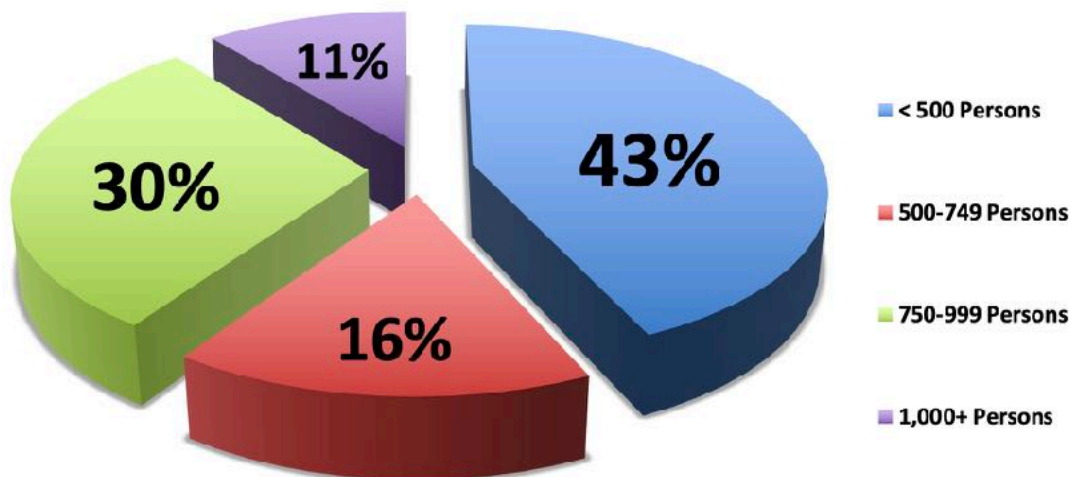
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Lake frontage is very important to the summer camping industry. Most camps are, in fact, built around large bodies of water used for recreation and as scenic attractions. This is one of the reasons so many have located in the Greater Poconos where there is an abundance of lakes. Lake frontage involved is as much as 10,000 feet (nearly two miles) and averages 2,200 feet.



Infrastructure availability among camps illustrates the versatility of the industry. Some 87% of camps have a gymnasium, recreation hall or similar large facility. These range in size from holding 200 to 2,000 persons. The average facility accommodates 665 persons. The ability to utilize these assets for banquets, conferences and events at their facilities outside of the camping season, generating added economic activity for the area.

## Camp Recreational Hall Capacity



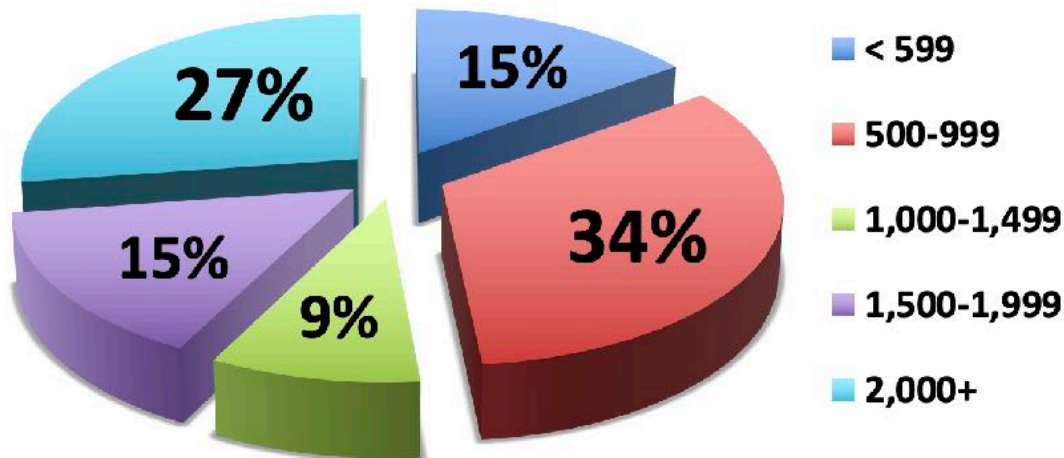
## The Economic Impact of the Greater Pocono Summer Camp Industry

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Camp representatives were asked to identify the extent to which their facilities were used off-season for other than traditional camp purposes. Altogether, 90% of camps utilized or rented their facilities for other than summer camp purposes. Activities included sports camps, retreats, religious celebrations, parties, corporate meetings, weddings, school groups and other special events. Much more of this can be expected in future years as camp organizations capitalize on the multipurpose capacities of their facilities.

Camps typically open for summer camp in early to late June. They typically close altogether in late September.

### Numbers of Visitors Per Camp



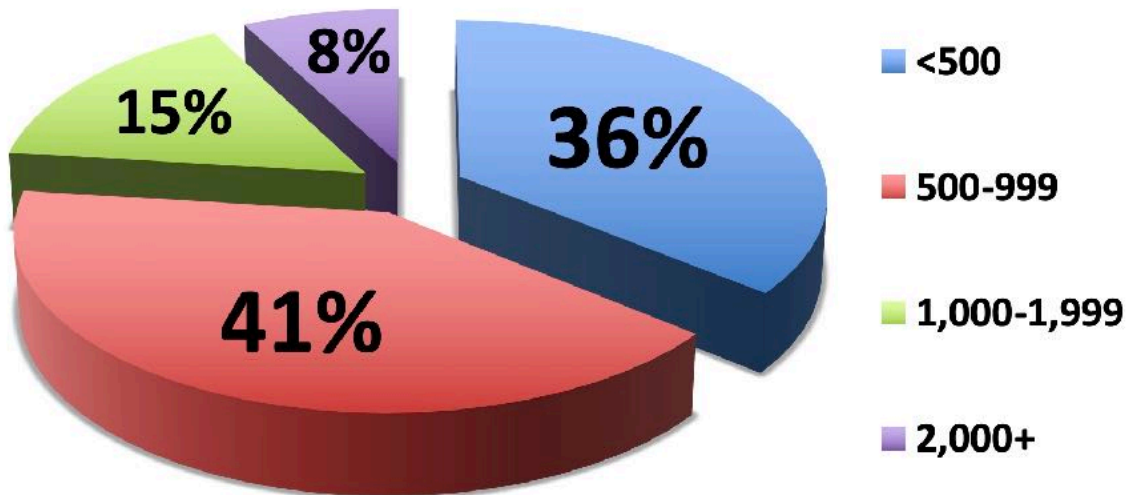
A large number of persons visit camps during the camping season. Some 56% of camps indicated they received at least 1,000 visitors during the season, with one reporting 7,000 visitors during the season. The average number of visitors was 1,494 persons per camp, which indicates total visitation to the 68 Greater Pocono region camps of almost 102,000 persons per year.

Many of these individuals, of course, spend money in camp areas while visiting camps to tour the facilities or see their children. This generates considerable economic multiplier benefits for the region. These accrue to restaurants, hotels, bed and breakfasts and the businesses that serve these enterprises.

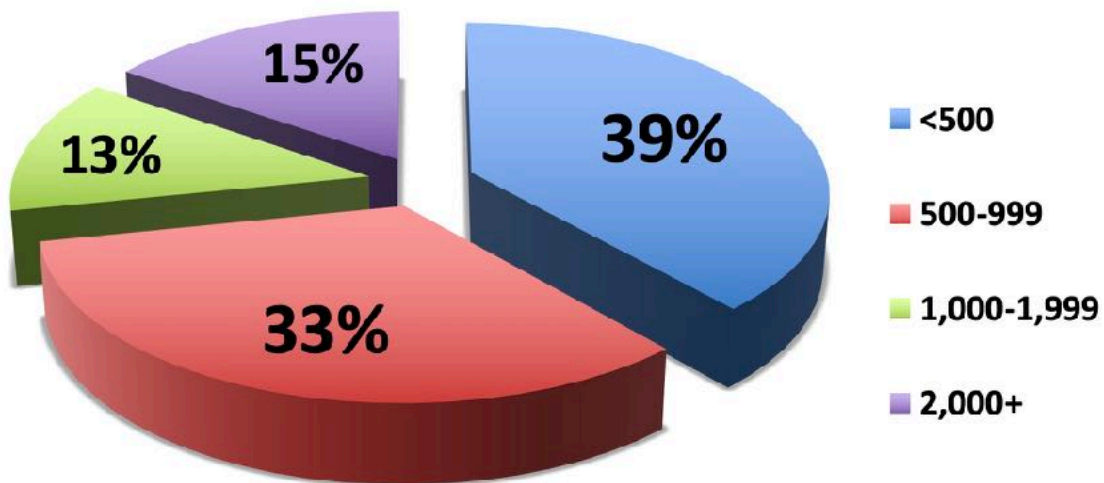
Campers themselves and other camp users are also visitors, of course. The average summer camp served 724 campers with 23% serving over 1,000 campers and three serving over 2,000. Camps also served an average of 1,261 other users. The total number of campers visiting the area annually, based on this sampling of Greater Pocono region camps, exceeds 52,375 campers. Other users amounted to 82,700 altogether for all camps.



## Number of Campers Per Camp



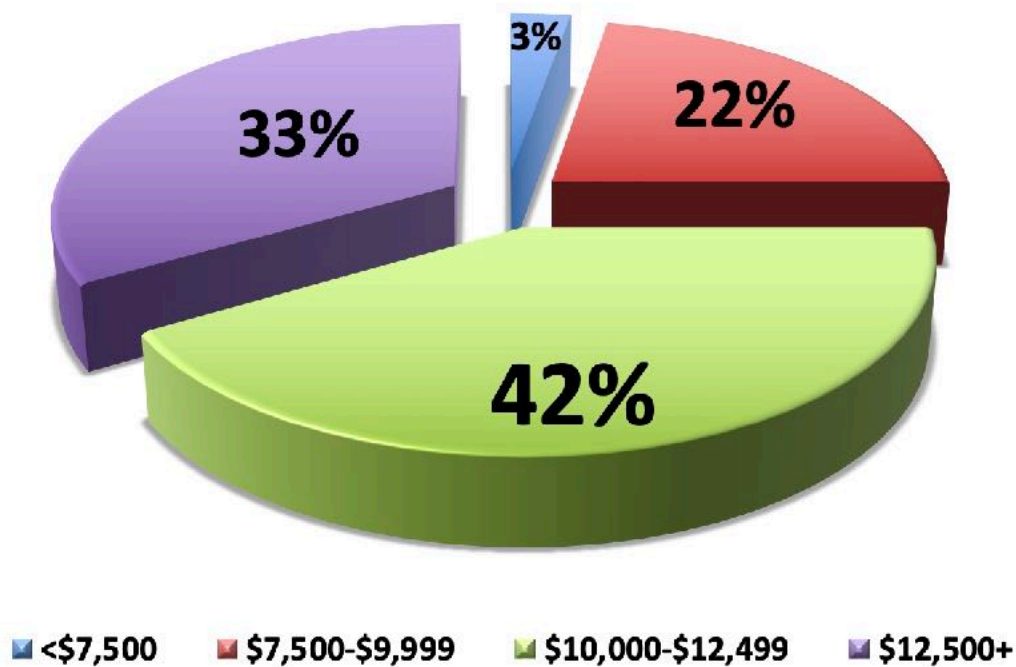
## Number of Other Users Per Camp



Camper fees charged for the season ranged from \$6,600 to \$18,000 per person. The average fee for the season was \$11,644. Some 25% of fees are under \$10,000, 42% fall between \$10,000 and \$12,499 and 33% are between \$12,500 and \$18,000.

Fees, of course, depend, to a large extent, on the length of the camping season and some camps offer multiple camping periods per season. The average monthly fee for campers in such instances was \$6,577 and the average weekly fee was \$2,316.

## Typical Camp Fees



Those camps accommodating off-season use of facilities for pre and post-camp activities generate significant additional income for themselves and the area. Camp revenue from these sources ranged from \$10,000 to \$1,000,000 per year and averaged \$357,851 per camp.



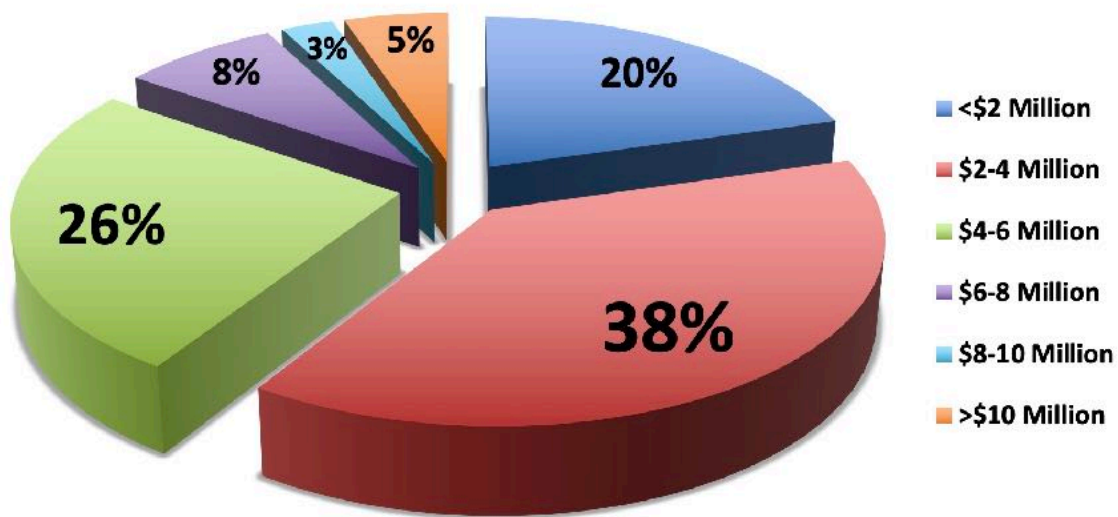
# The Economic Impact of the Greater Pocono Summer Camp Industry

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## 4.0 Direct Impacts of Summer Camps

So as to assess direct impacts of the industry on the local economy, camps surveyed were asked several questions regarding operating expenditures for the year 2022. These represented monies spent on goods, services, wages, maintenance and other activities. These operational expenditures ranged from \$500,000 to \$15.5 million. The average operating expense per camp was, in fact, \$4,172,000 per year, indicating the 68 Greater Pocono region camps spend as much as \$284 million annually.

### Average Operating Expenditures



Continued capital investment is critical to the long term success of any business. Camps have been exemplary in this regard. This helps to explain their longevity as enterprises.

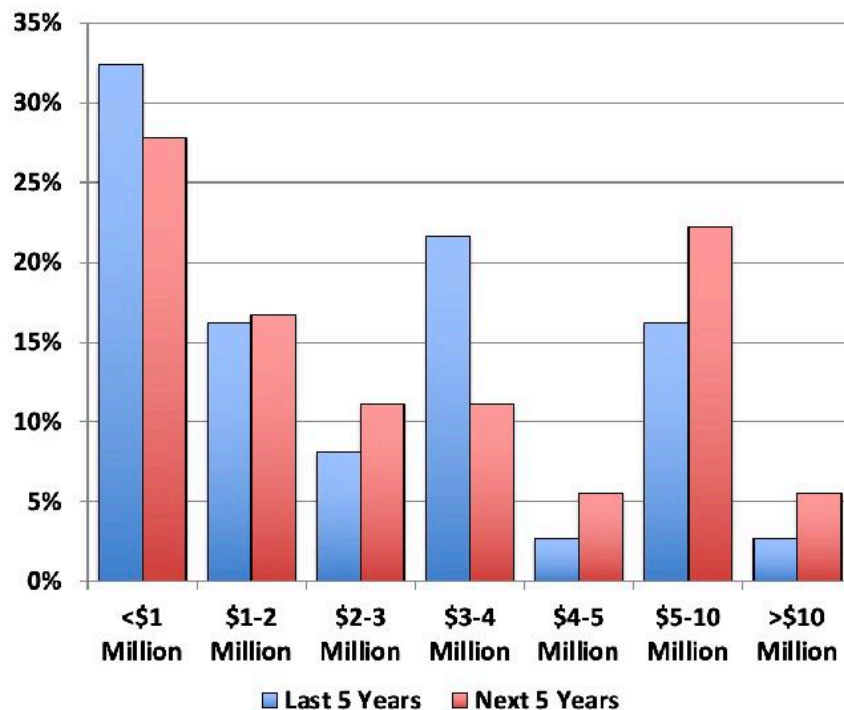




# The Economic Impact of the Greater Pocono Summer Camp Industry

The average capital investment made over the last five years (from 2018-2022) by those camps surveyed was \$2.5 million and going forward owners expect to spend an average of \$3.0 million or \$600,000 per year. Extrapolating these figures for all 68 Greater Pocono region camps suggests the camp industry as a whole is investing approximately \$41,000,000 per year of new capital in the regional economy. This consistent investment helps protect existing employment while creating additional work opportunities for the future.

## Capital Investments

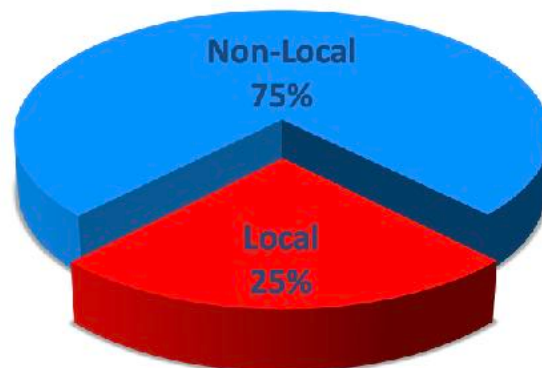


Annual expenditures in several individual categories were also queried.

Payroll expenses represent the single largest category of camp expenditures at an average of \$1,448,226 annually per camp, of which \$359,177 was spent locally and \$1,448,226 non-locally costs. The dollars expended are important for the multiplier impacts discussed later in this report. Local payroll costs were over \$1,000,000 in three instances.

Also, food expenditures made locally averaged \$141,433. This compares to an average of

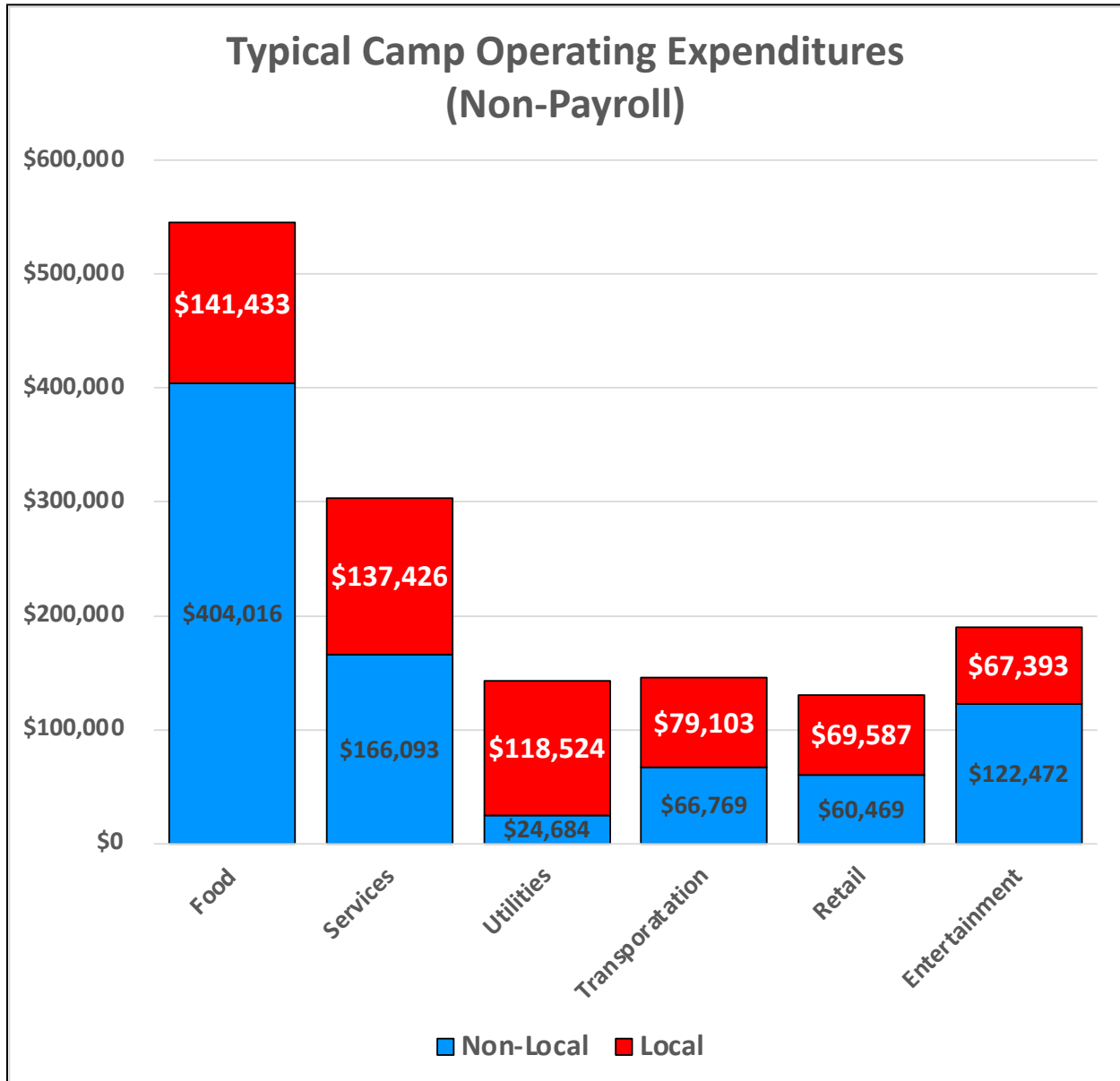
## Typical Payroll Expenditures



## The Economic Impact of the Greater Pocono Summer Camp Industry

\$404,016 spent non-locally on food. One camp spent \$500,000 on food locally.

Camp services expenditures averaged \$137,426 locally and \$166,093 non-locally. Some camps spent over \$450,000 locally on services.



Utilities expenditures (phone, electric and related costs) averaged \$118,524 locally and \$24,84 non-locally. Multiple camps spent over \$200,000 annually on utilities.

Local transportation expenditures averaged an estimated \$79,103 with an estimated average of \$66,769 spent on non-local transportation.



# The Economic Impact of the Greater Pocono Summer Camp Industry

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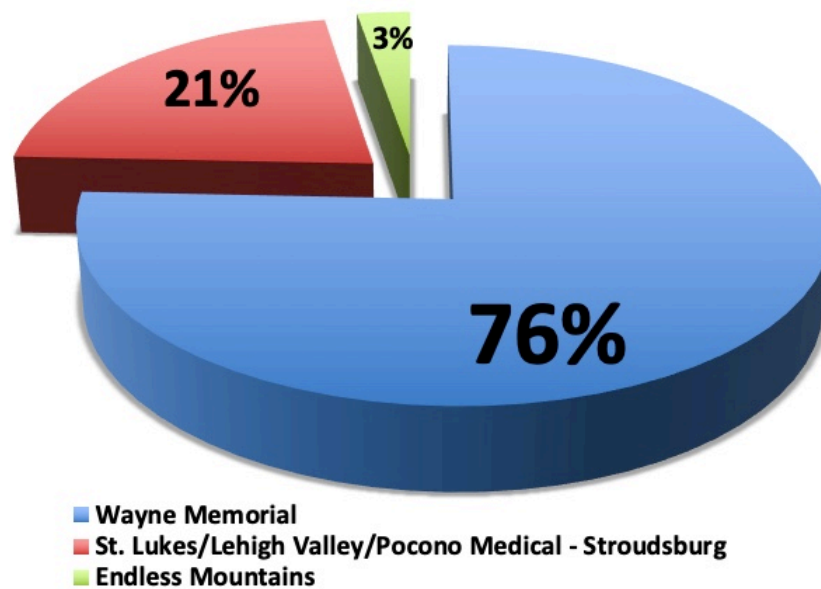
Retail expenditures locally averaged \$69,587, while non-local retail spending averaged \$60,469.

Entertainment expenditures locally averaged \$67,393, while non-local spending averaged \$122,472. One camp spent \$300,00 on entertainment.

Greater Pocono camps also use and support a number of valuable community services. Camp owners were asked to identify the types of medical facilities and personnel available to their camps. Some 76% of camp representatives answering indicated they had a doctor present and 97% have some form of health clinic, infirmary or wellness center on-site. Several camps have more than 10 medical professionals (doctors, nurses and medical assistants on staff).

Wayne Memorial Hospital in Honesdale was the emergency health services provider for 76% of the camping organizations surveyed, while other camps relied upon facilities in Stroudsburg (St. Lukes/Lehigh Valley/Pocono) or Susquehanna County (Endless Mountains Health System).

## Hospital Facilities Utilized



Camps were asked how often they used local police or fire protection services. Some 51% of camps indicated they used local fire or police services in 2022, with 38% relying upon these services two or more times.

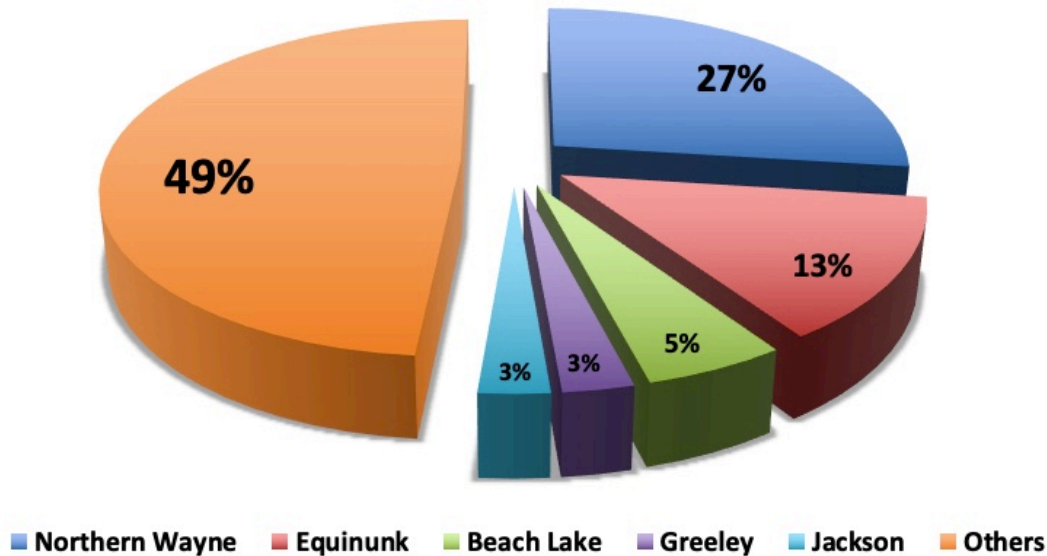
Some 97% of respondents indicated services had been efficiently provided. The Northern Wayne Fire Company was used by 27% of camps, while the Equinunk Fire Company served another 13%. Others used services from



# The Economic Impact of the Greater Pocono Summer Camp Industry

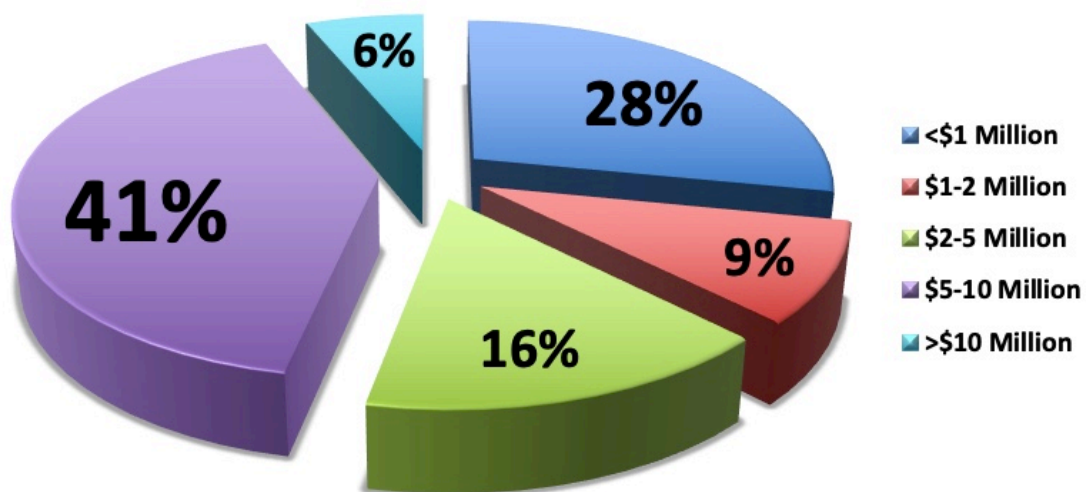
Beach Lake, Greeley and Jackson Township as well as a host of fire department from across the Greater Poconos region as defined herein (including certain Southeast Pennsylvania areas).

## Fire Departments Utilized



Questions were asked about the financial contributions of camps and their use of local financial institutions. Some 92% of camps indicated they had local bank accounts, with the largest having \$16 million in local bank deposits in 2022, and the average amount being \$4,087,887 per camp.

## Camp Deposits in Local Banks



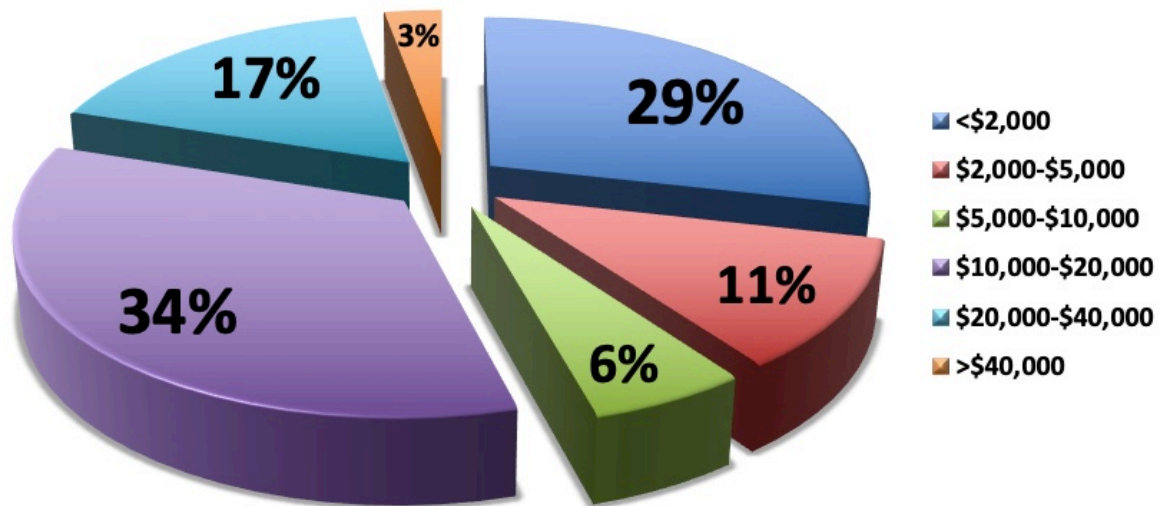
# The Economic Impact of the Greater Pocono Summer Camp Industry

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One-third of camps indicated they also had mortgage accounts in a local banks with the largest being \$8 million, and the average mortgage account being \$2,811,500 for all camps reporting on this question.

Camps also support numerous non-profit community institutions and services. Charitable contributions made to local groups such as the Red Cross, hospital, fire companies and others by reporting camps amounted to an average of \$10,445 per camp.

## 2022 Charity Contributions by Camps



Large amounts of taxes were also paid by reporting camps for the year 2022. Pennsylvania Sales Tax payments amounted to an average of \$33,406 per camp for the 62% who incurred sales tax obligations and 19,740 overall. This suggests Greater Pocono region camps paid as much as \$1.3 million in state sales taxes.

Local taxes paid to school districts, counties and municipalities averaged \$133,277 per camp (\$68,501 to schools, \$36,449 to counties and \$28,327 to municipalities). This makes the camps extraordinarily important parts of the tax base for all localities where they are situated.

Three camps, in fact, paid \$200,000 or more in property taxes. Extrapolating, it is estimated the greater Greater Pocono region camps pay more than \$9 million in property taxes. Summer camps also consume relatively little in the way of services. Therefore, they are large net tax producers for the region.

A review of tax assessment data for Wayne County alone for 2023 indicates it has 28 summer camps on its tax rolls, with a combined land area of 8,308 acres and an assessed value of \$190,439,201.

# The Economic Impact of the Greater Pocono Summer Camp Industry

This does not necessarily include all taxable camp properties because some surrounding open space lands may be classified and assessed separately, plus some lands are held in individual ownerships and may not, for this reason, be included in the children's camp assessment category. This market value should, therefore, be viewed as the minimum tax base generated by summer camps in Wayne County.

The following table provides the essential data:

Property Taxes Generated by Wayne County Camps							
Municipality	Acres	Total Assessed Value	Total Taxes Paid	School Taxes Paid	County Taxes Paid	Municipal Taxes Paid	Camp % of Municipal Taxes Paid
Berlin	863	\$24,662,704	\$400,472	\$300,088	\$79,907	\$20,477	6.6%
Buckingham	1,712	\$38,325,300	\$634,156	\$466,330	\$124,174	\$43,653	20.9%
Clinton	165	\$2,613,800	\$40,440	\$30,902	\$8,469	\$1,069	1.2%
Damascus	200	\$6,482,700	\$111,389	\$78,879	\$21,004	\$11,506	1.0%
Dyberry	277	\$6,023,400	\$95,289	\$73,291	\$19,516	\$2,483	2.0%
Lebanon	554	\$19,097,275	\$303,669	\$232,369	\$61,875	\$9,425	11.2%
Manchester	605	\$25,502,600	\$451,740	\$310,307	\$82,628	\$58,804	12.2%
Oregon	96	\$6,842,220	\$110,042	\$83,254	\$22,169	\$4,619	5.6%
Preston	3,547	\$57,276,962	\$948,373	\$696,927	\$185,577	\$65,869	17.5%
Scott	290	\$3,612,240	\$60,814	\$43,953	\$11,704	\$5,158	3.4%
<b>Totals</b>	<b>8,308</b>	<b>\$190,439,201</b>	<b>\$3,156,385</b>	<b>\$2,316,301</b>	<b>\$617,023</b>	<b>\$223,061</b>	<b>13.8%</b>

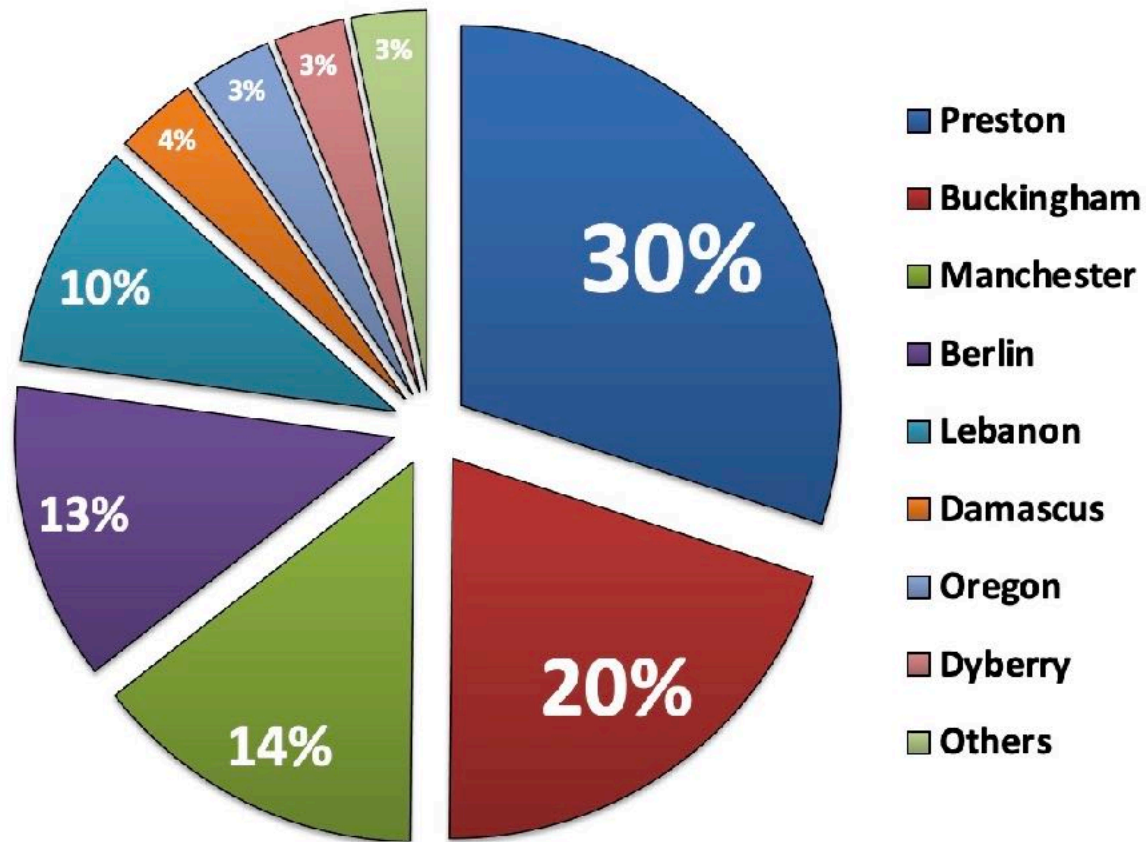
A total 10 of Wayne County's municipalities include summer camps. These camps pay a combined total of \$3,156,385 in real estate property taxes at 2023 tax rates.

Tax revenues generated by camps range from a low of \$40,440 in Clinton Township to a high of \$948,373 in Preston Township. Summer camps pay over \$100,000 in taxes in seven different municipalities.

Summer camps pay 20.9% of the taxes in Buckingham Township, the largest single commercial assessment category for that municipality. They also pay 17.5% of taxes in Preston Township, 12.2% in Manchester Township, 11.2% in Lebanon Township, 6.6% in Berlin Township and 5.6% in Oregon Township, all Northern Wayne County communities.

Countywide, children's summer camps pay fully 2.2% of all real estate property taxes, an impressive statistic given the industry is generally confined to a relatively few communities and the average revenue to local municipalities is 13.8% of their income from property taxes.

## Distribution of Wayne County Camp Taxes Paid by Municipality



These numbers indicate the major positive fiscal impacts of the camp industry on local government. No other commercial assessment classification has, in recent years, produced more taxes countywide than children's camps.

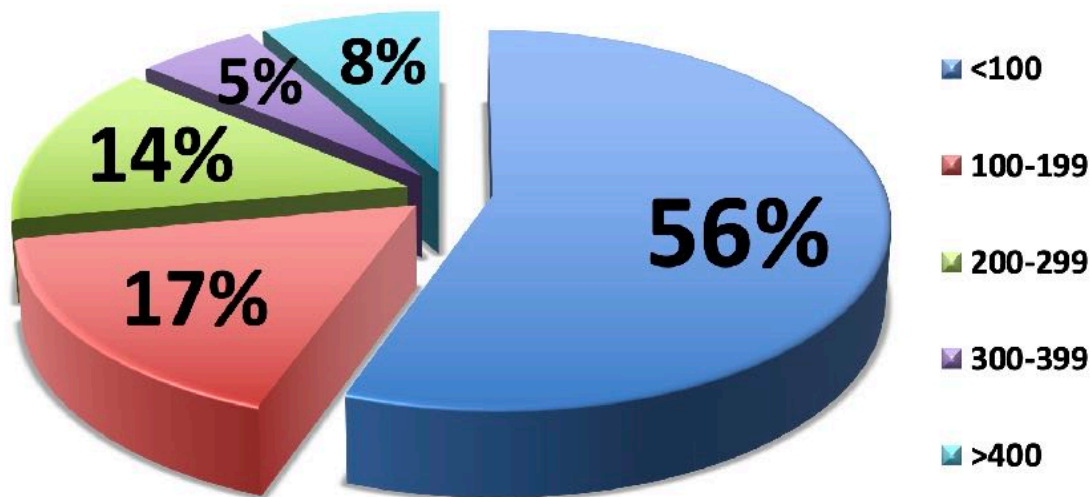
Camps were also asked to indicate numbers of employees on-site throughout different parts of the year. Reporting camps indicated they used an average of 6.8 full-time and 122.6 part-time employees annually at their local facilities.

This equates to a total of roughly 8,800 employees at Greater Pocono area summer camps, some 460 of which are estimated to be full-time, and 8,340 of which are estimated to be part-time. The largest part-time employer among the camps surveyed used 800 such employees.

Some 12.3% of all employees were reported to be local residents, an average of 15.9 jobs per camp.

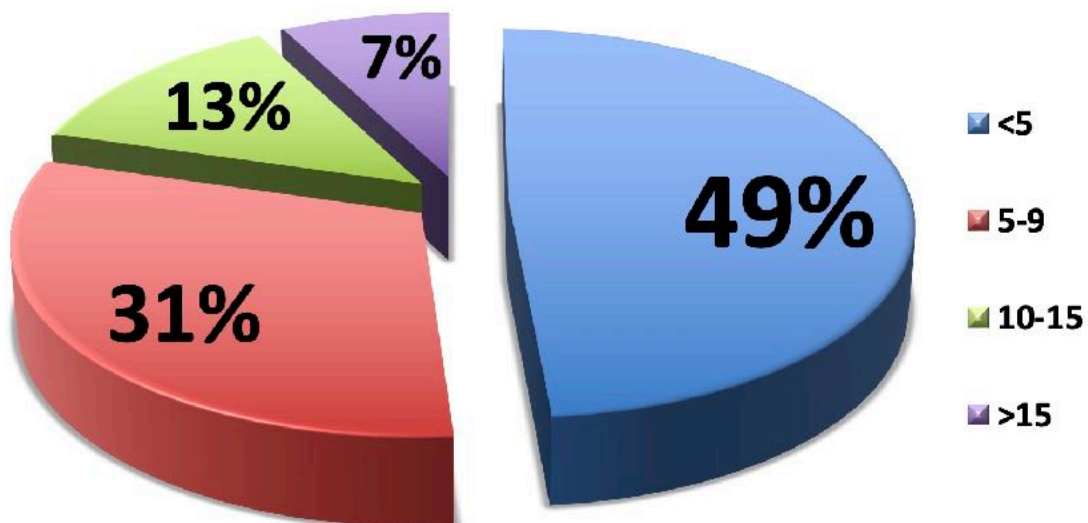


## Part-Time Camp Employees - 2022



These are significant job numbers. There are also major multiplier benefits connected with the part-time employment because so many of these employees are recruited from outside the area and foreign countries. They spend much of their income in the area while residing locally.

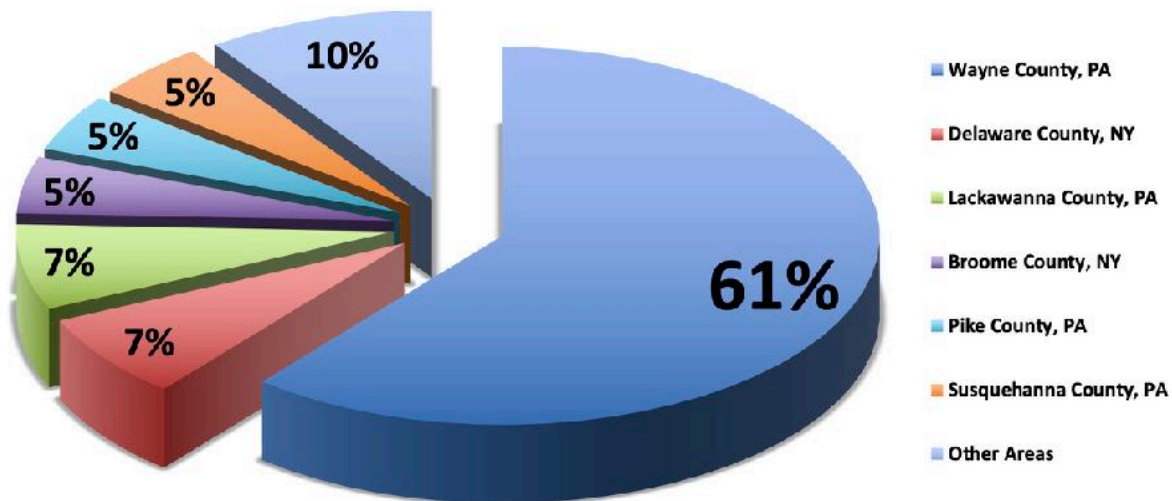
## Full-Time Camp Employees - 2022



# The Economic Impact of the Greater Pocono Summer Camp Industry

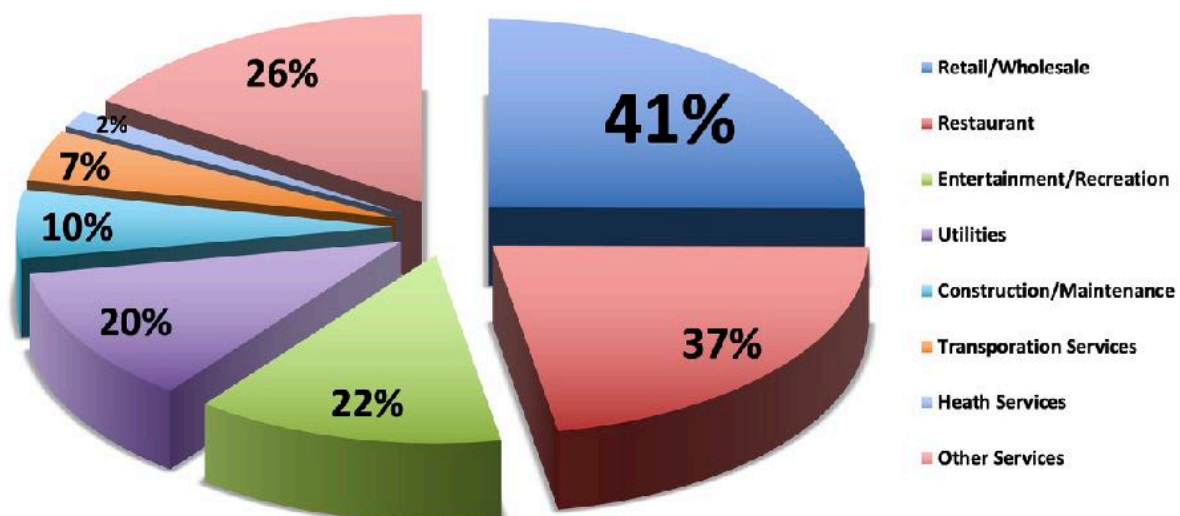
A survey of over more than 40 traditional camp vendors was also made to evaluate economic impacts. They responded with revealing information regarding economic impacts on their businesses. These vendors came almost entirely (98%) from the Greater Pocono or immediately adjacent areas of New York State, as the following chart illustrates:

## Camp Vendor Locations



Leaving aside one large vendor with 450 employees located in Texas and providing staffing services, the average vendor had 14.2 employees and did \$143,000 of camp business annually.

## Camp Vendor Businesses

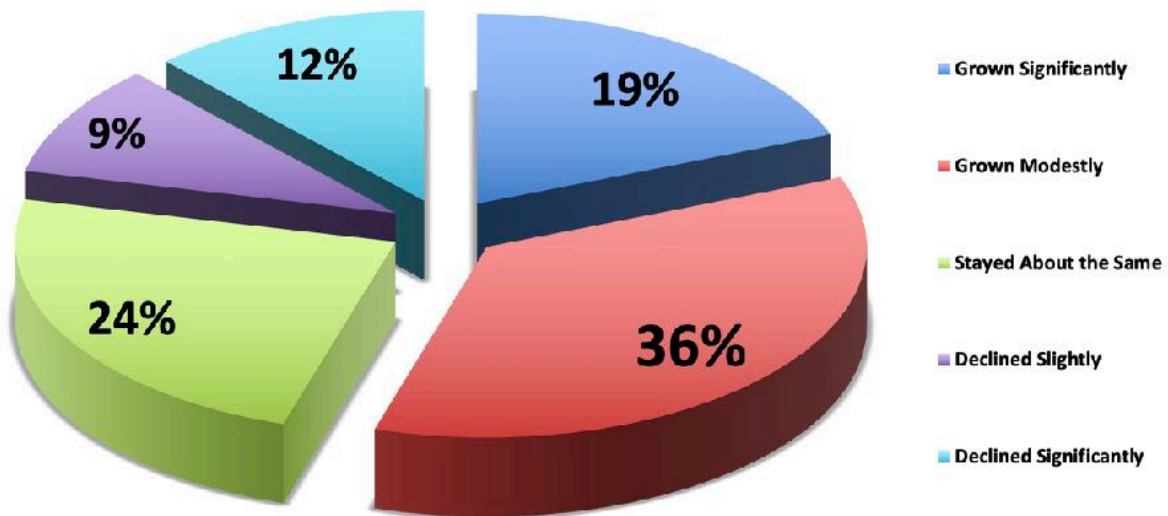


# The Economic Impact of the Greater Pocono Summer Camp Industry

As the above chart shows, camps heavily patronize retail/wholesale enterprises (41% of total), restaurants (37%) and entertainment/recreation providers (22%). Some 59% hire additional help for the camp season to handle business (including just before and after the season itself).

Importantly, 55% of vendors indicate their camp business as either grown modestly (36%) or significantly (19%), indicating a very favorable pre- and post-COVID trend and 68% want to further increase camp business.

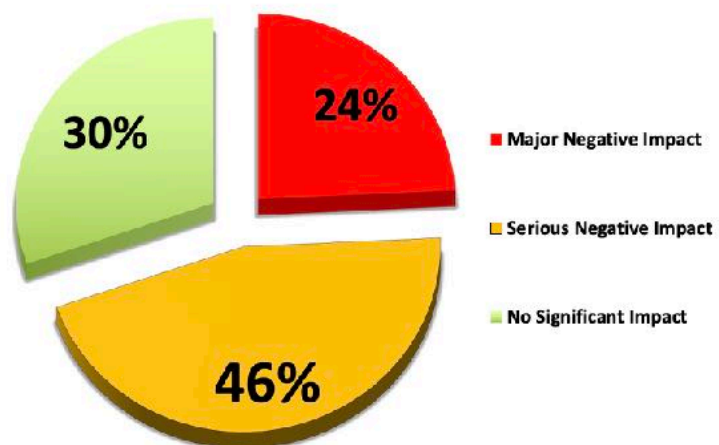
## Camp Vendor Business Trends



During 2020 COVID lockdowns, summer camp vendors were very negatively affected. Some 46% experienced serious negative impacts and another 24% of vendors suffered major negative impacts from seasonal camp closures and reduced sizes of camp operations.

Altogether, some 70% of surveyed vendors lost revenue critically important to their own operations. At least one vendor who did substantial business with camps closed business as a result.

## COVID Impacts

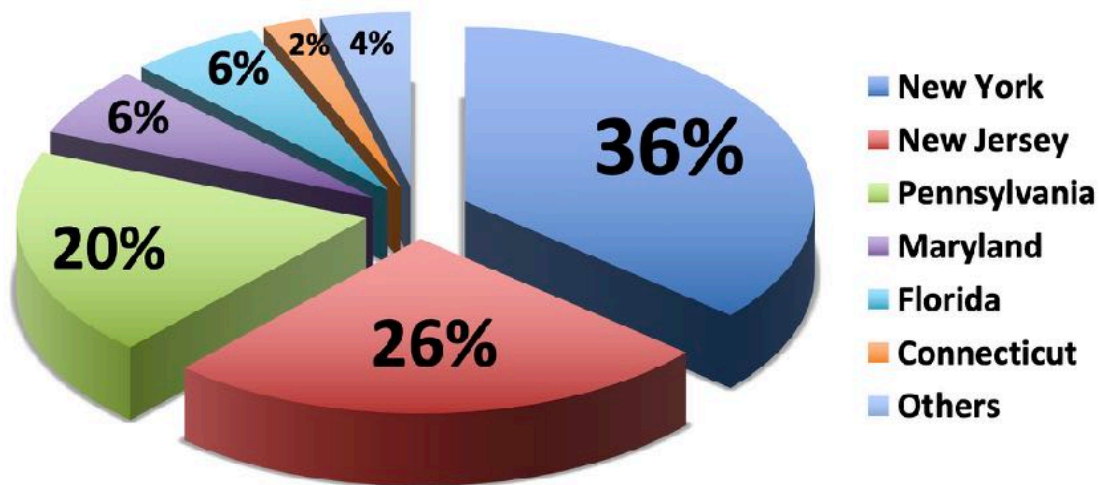


## The Economic Impact of the Greater Pocono Summer Camp Industry

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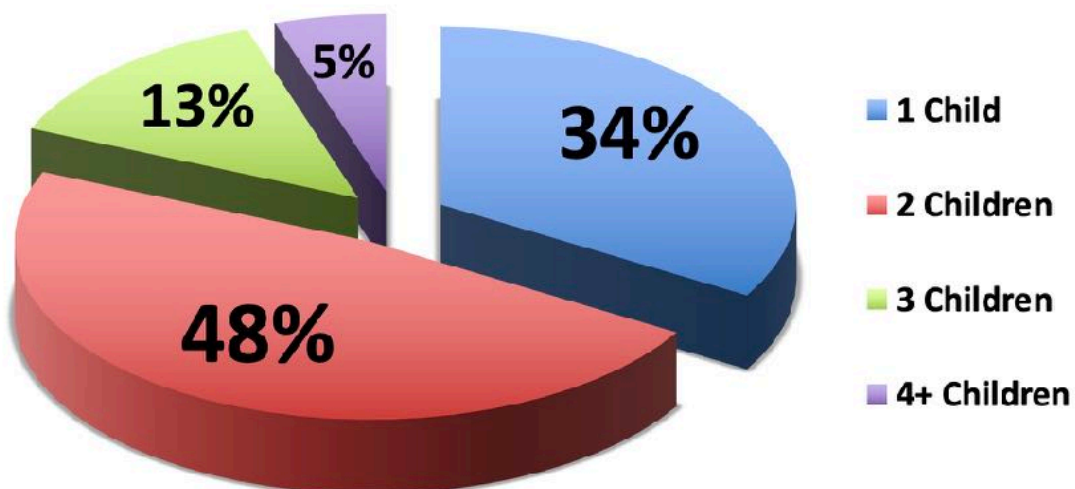
Parents and employees were also surveyed to further gauge impacts of camp activity. The results demonstrate camps contribute to the overall quality of life within the region while introducing new people to it. Parents of campers come from throughout the country.

### Home State of Summer Campers



Parents were also asked how many children they sent to summer camps. Some 48% of respondents had one child at summer camp, another 41% had two children and some had as many as four children at camp. The average was 1.64 children (1.89 children for all-time).

### No. of Children at Camp



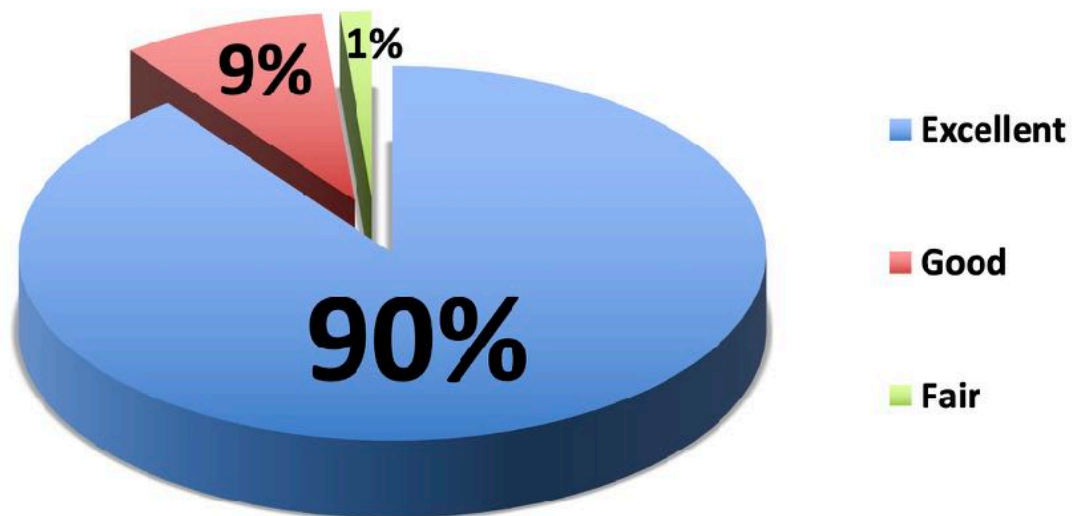


## The Economic Impact of the Greater Pocono Summer Camp Industry

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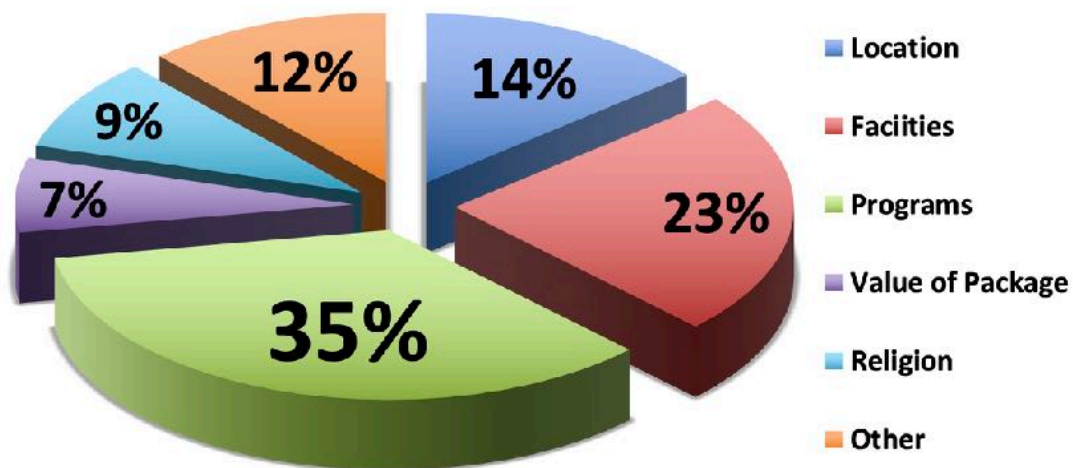
Some 90% of respondents stated their overall level of satisfaction with the camp where they sent their children was excellent and the bulk of the remainder described it as good.

### Overall Satisfaction with Camp



Parents expressed a variety of reasons for choosing summer camps for their children, with quality of the programs offered topping the list at 35%. Quality of the facilities (23%) and the camp location (14%) were also important. Other reasons included family tradition, sense of community, safety, staffing and camp values.

### Reasons for Choosing Camp



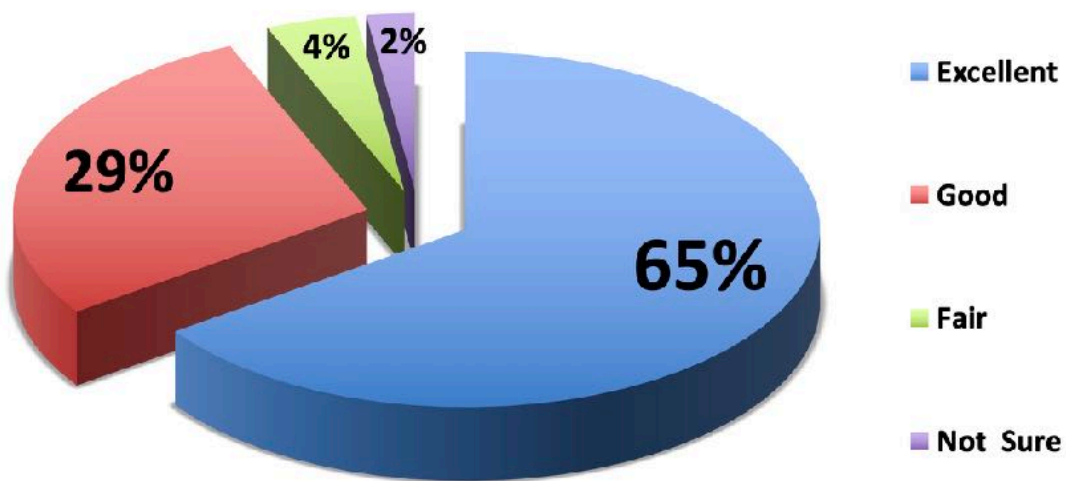
## The Economic Impact of the Greater Pocono Summer Camp Industry

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Some 14% cited the quality of the camp location as a key factor in choosing it for their children, 65% rating their overall level of satisfaction with the location of the camp as excellent and 29% rating the area as good. Others rated the location as fair (4%) or were not quite sure (2%).



### Satisfaction with Camp Area



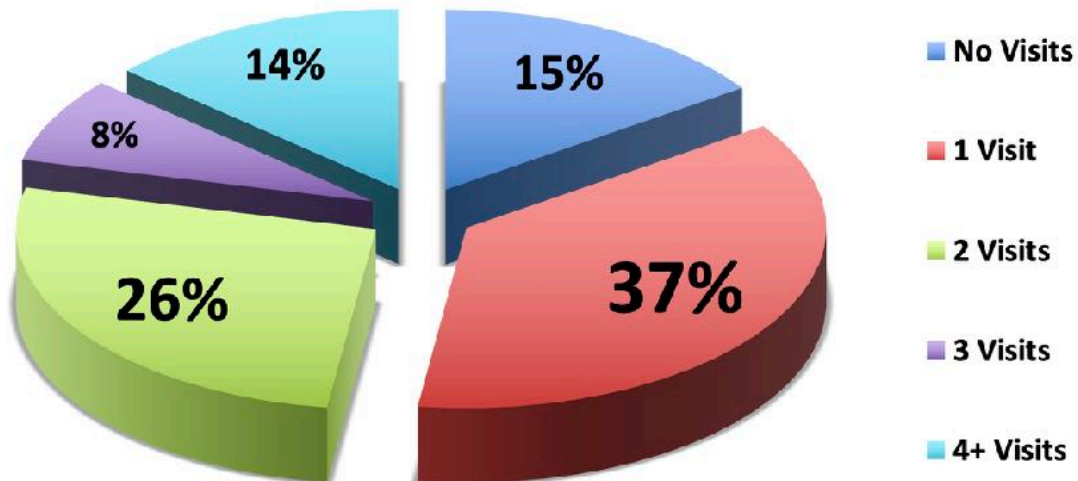
# The Economic Impact of the Greater Pocono Summer Camp Industry

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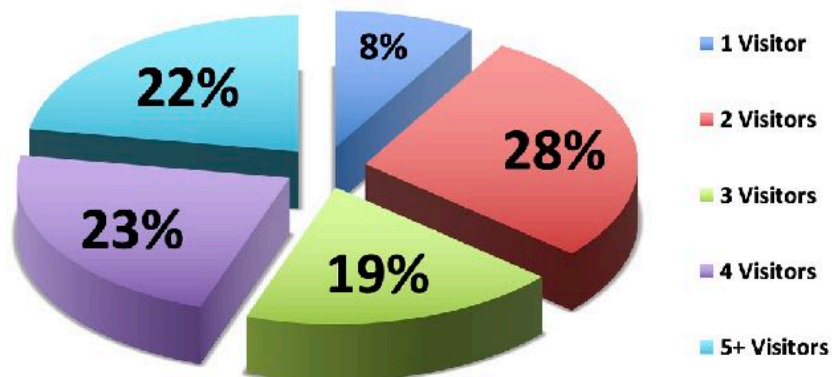
Some 85% of parents visited camp at least once in 2022, but many visited multiple times, the average being being 2.25 visits per season. Visiting parties averaged 3.47 persons in size and stayed 3.2 days and 2.4 nights. Most (58%) stayed at a hotel, motel or bed and breakfast, although 22% stayed at the camp or with friends (7%). Some 13% stayed within 50 miles.

## No. of Camp Visits by Parents

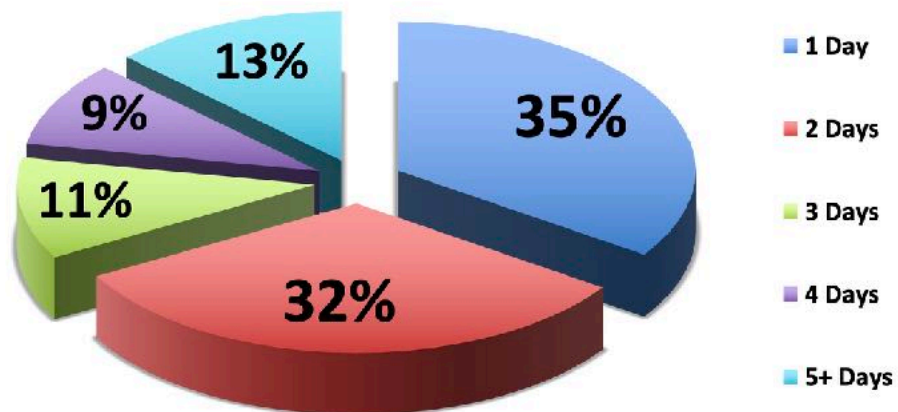




## No. of Family Members Visiting

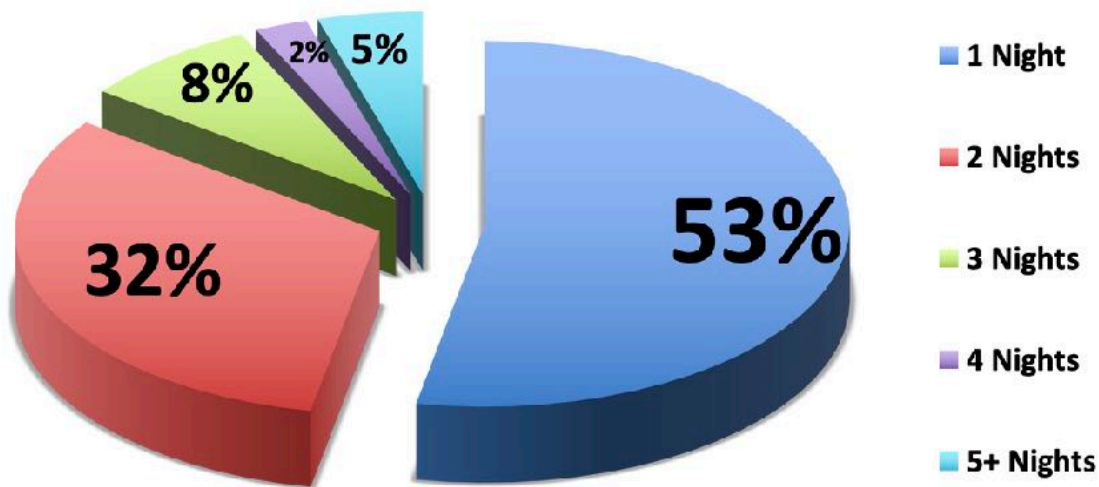


## No. of Days Visited





### No. of Nights Stayed



Revealingly, 65.0% of parents were former summer campers themselves and 53.4% worked at summer camps, indicating the sort of tradition that summer camping is among many families.

Those experiences translate into very definite opinions about the Pocono region. Some 56.1% said visiting the camp made them want to visit the area for other reasons, 18.5% stated the experience made them want to move to or have a second home in the area and 17.4% said it made them want to consider investing in the area.

Parents were also asked to estimate their local expenditures on a daily basis when visiting camp. The table following details the results:

Greater Pocono Parent Visit Expenditures Per Season			
Expense Category	Average Local Amount	Average Non-Local Amount	Total Local Impact
Food	\$101.18	\$44.23	\$10,982,077
Lodging	\$203.86	\$45.85	\$22,126,964
Transportation	\$44.21	\$67.92	\$4,798,553
Entertainment	\$44.75	\$21.94	\$4,857,165
Retail	\$50.73	\$15.21	\$5,506,234
Other	\$31.99	\$6.83	\$3,472,195
<b>Totals</b>	<b>\$476.72</b>	<b>\$201.98</b>	<b>\$51,743,189</b>

## The Economic Impact of the Greater Pocono Summer Camp Industry

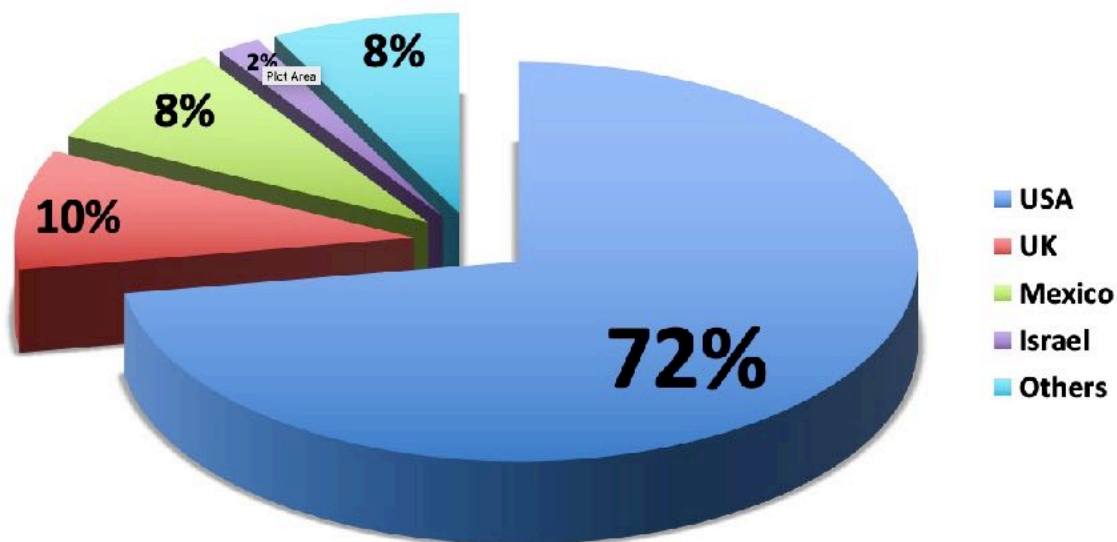
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The typical camper parents spent \$476 per day locally when visiting children at local summer camps. This represents a direct impact on the regional economy of roughly \$51,750,000 in tourism expenditures (assuming 52,355 campers, 85% of whose parents visited and using the average of 3.2 days spent at camp per family and 1.64 children at camp plus 25% for after camp programs).



Employees were also asked to help identify the direct impacts of camps on the local economy. Most come from the United States (72%) but significant numbers from the United Kingdom, Mexico and elsewhere.

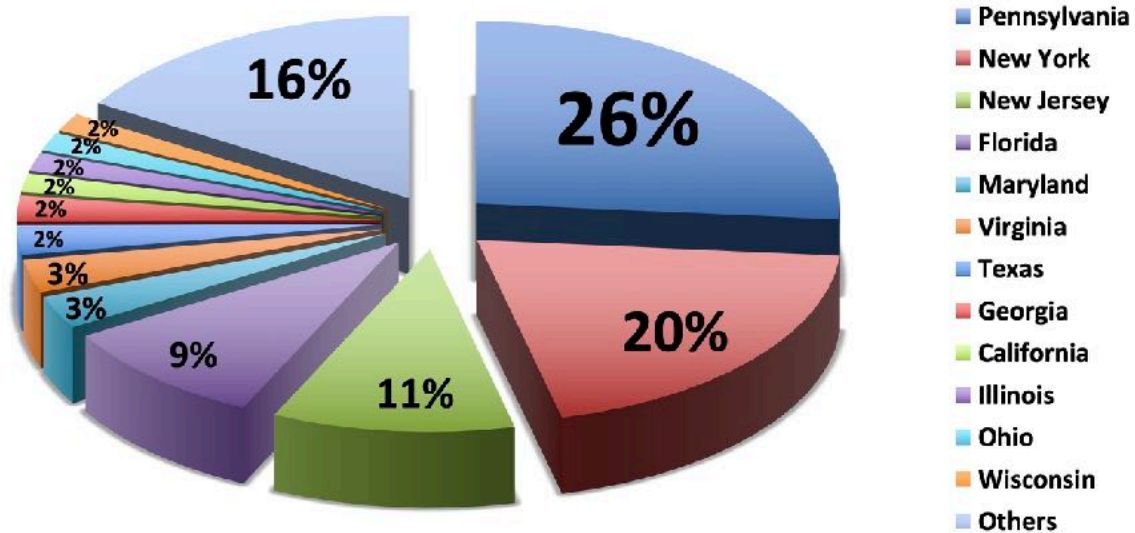
### Camp Employees by Nation of Origin



## The Economic Impact of the Greater Pocono Summer Camp Industry

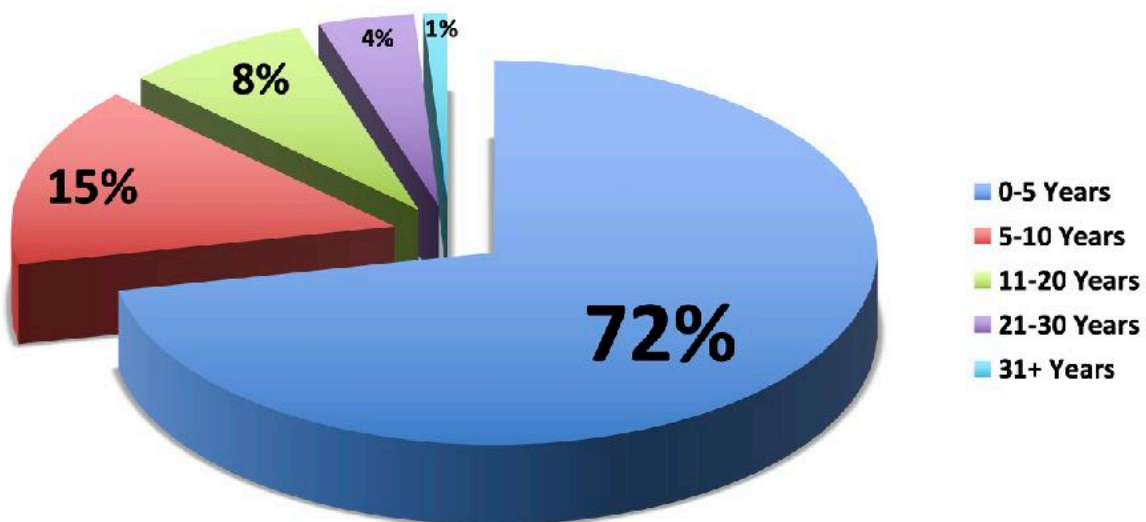
Some 26% of camp employees from the U.S. came from Pennsylvania, 20% from New York, 19% from New Jersey, 9% from Florida. Others came from Maryland, Virginia, Texas and elsewhere.

### US Camp Employee Origins by State



The years employees have worked at their camps indicates a large number of return workers and high level of job satisfaction. Some 46% of employees worked more than five years at camp with the average being 5.4 years.

### Years Worked at Camp

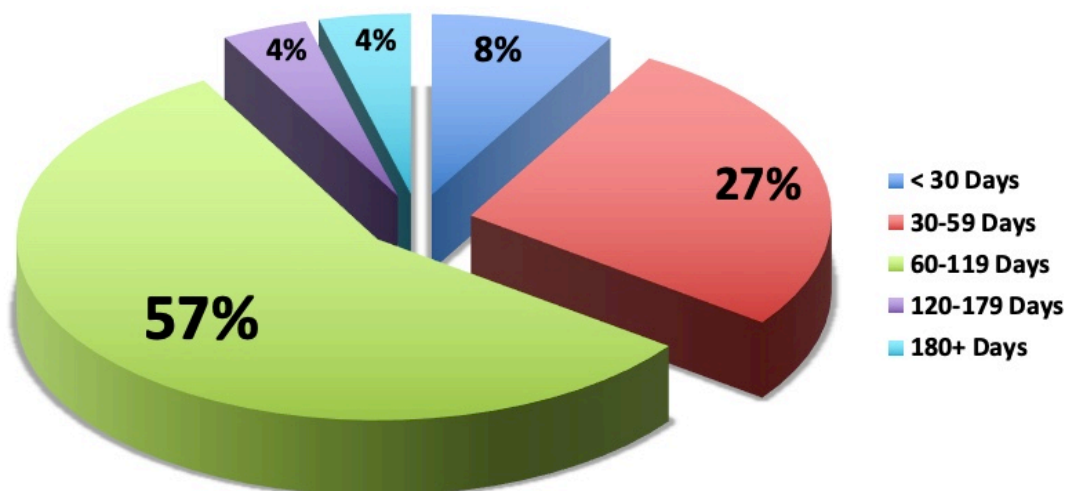


## The Economic Impact of the Greater Pocono Summer Camp Industry

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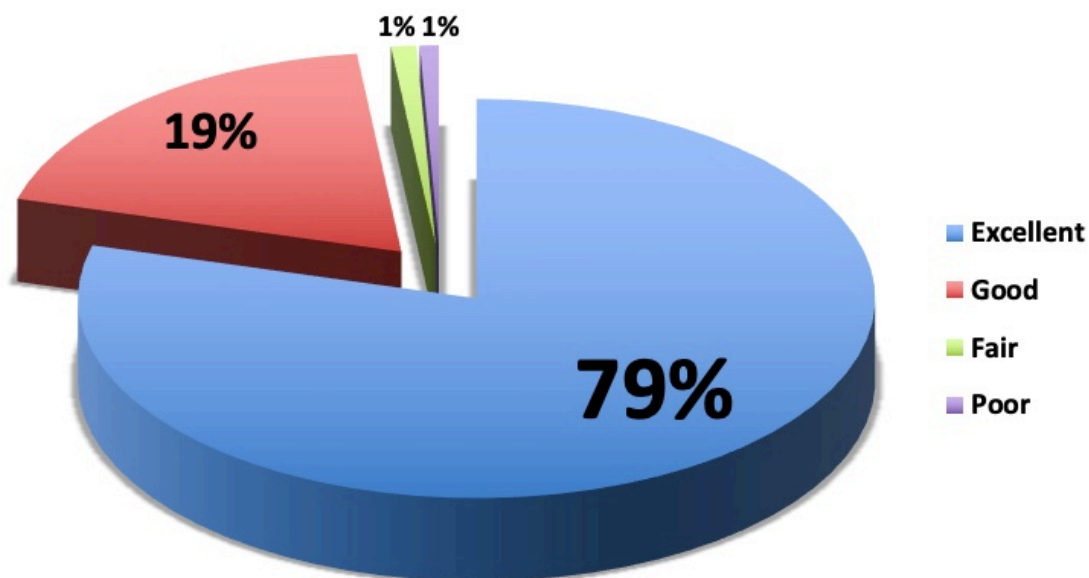
Some 65% of camp employees worked 60 or more days at camp, with the average employee working a total of 68.5 days at camp.

### Days Worked at Camp - 2022



A large majority of camp employees (79%) rated the level of satisfaction with their job at the camp as being excellent and 19% described their experience as good.

### Camp Employee Job Satisfaction Rating

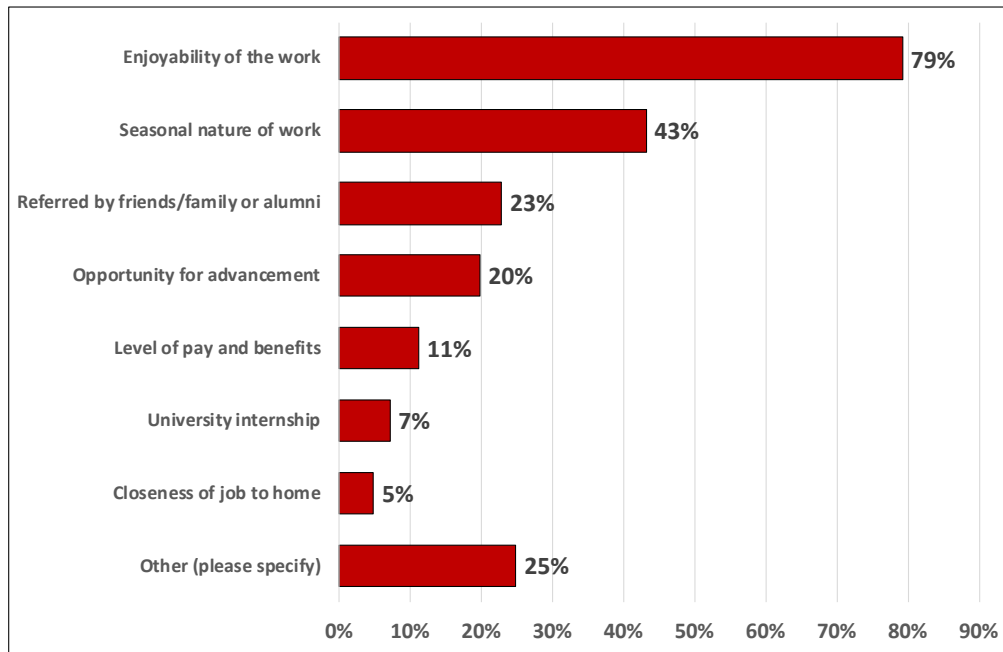




# The Economic Impact of the Greater Pocono Summer Camp Industry

They chose to work at their camps for various reasons. Enjoyability of the work was cited most often and seasonal nature of work as the next most important reason.

## Reasons for Choosing Camp Employment



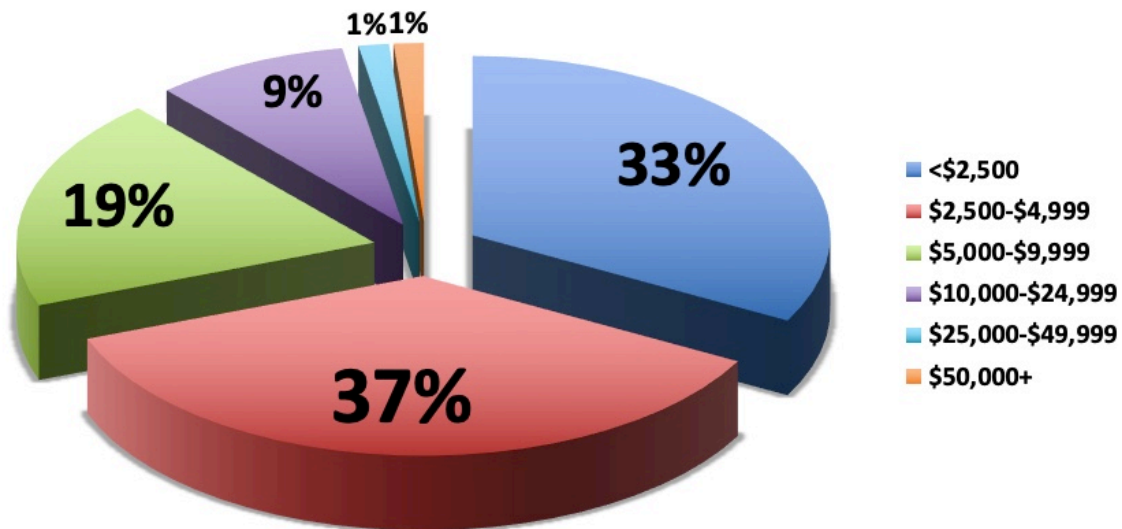
*Camp staff includes many young workers from around the world*

## The Economic Impact of the Greater Pocono Summer Camp Industry

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Salaries and wages of camp workers varied widely because of the combination of part-time, seasonal and full-time workers used. The following chart provides an overview.

### Summer Camp Salaries and Wages



The average summer camp employee salary was \$5,241.

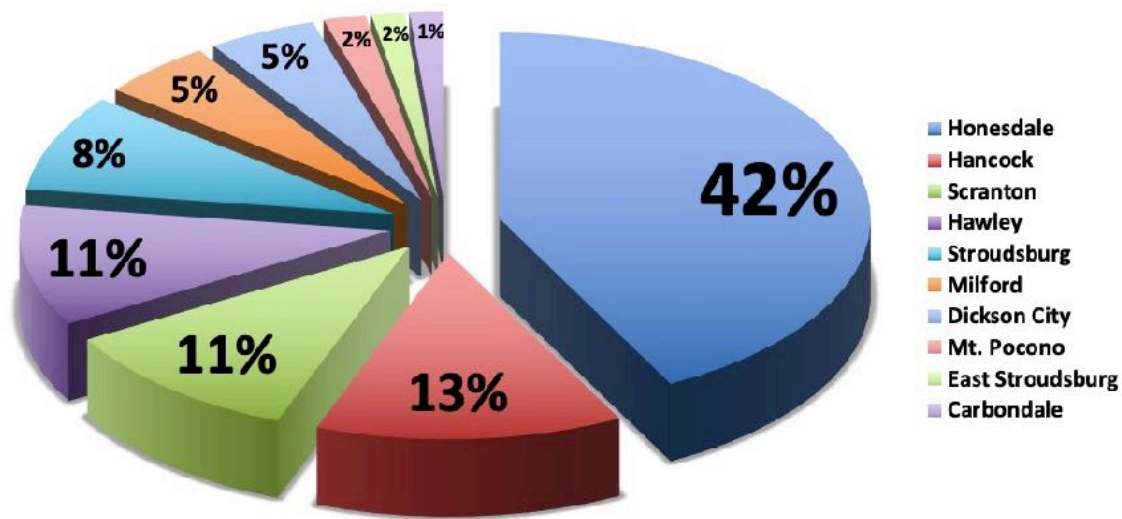
A number of questions were asked of these summer camp employees with the following results:

- A large majority of employees (87%) said that working at the camp had made them more likely to stay in the area.
- Some 38% stated they expected to work at the camp for 1-2 years, 33% hoped to work another 2-5 years and 29% planned to work 5-10 more years. Fully 62% expected to be working at camp five or more years.
- Some 26% felt the value of the camp was not fully appreciated by the community but only 10% believed the community was not fully appreciated by the camp, indicating a recognition of the value of the summer camp industry to the community and vice-versa.

Some 59% employees surveyed made purchases on behalf of their camps. Various shopping locations were rated by these employees as to whether they represented first, second or third choices.

Honesdale ranked first with 36% of points, Hancock ranked second at 26% and Scranton ranked third at 10%. The following chart indicates the overall popularity of the various locations.

## Camp Shopping Locations



Employees were also asked about other important contributions their camp makes to the area. Here is a brief sampling of responses:

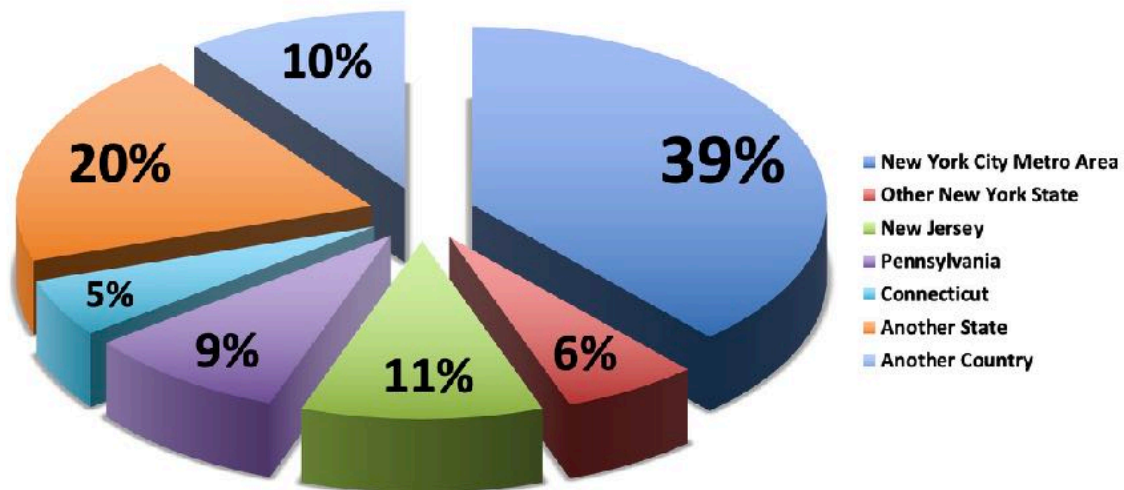
- The camp brings business to local restaurants, movie theater, thrift stores, and other activity based businesses for both camp trips and counselor days off.
- Camp is important to keep the tradition of families growing up together, to keep kids interacting face to face with each other and to give international staff an opportunity to experience the American culture.
- Camp is absolutely amazing. Knowing this is your home away from home brings such a sense of family and community.
- Camp brings in individuals over the summer who help boost the economy in the greater surrounding areas. From nights off to days off, staff are able to go into the community and help support local businesses.
- Personally, I spend approximately 2000 dollars a year in the local economy. This would be spent in restaurants, grocery stores, hotels, gas stations, etc..
- Campers do community service. They make backpacks filled with school supplies for the children in Lakewood, and they work at the library doing gardening and other tasks. Camps also contribute to the hospital, fire company, ambulance corps and food banks.

These insights reflect the positive experiences of employees and parents. They demonstrate the camp industry is not only alive and well, but making major contributions to the area.

## The Economic Impact of the Greater Pocono Summer Camp Industry

Camp alumni were also surveyed to gather their perspectives on these matters. Those alumni are largely located in the New York metropolitan area (39%).

### Where Camp Alumni Reside

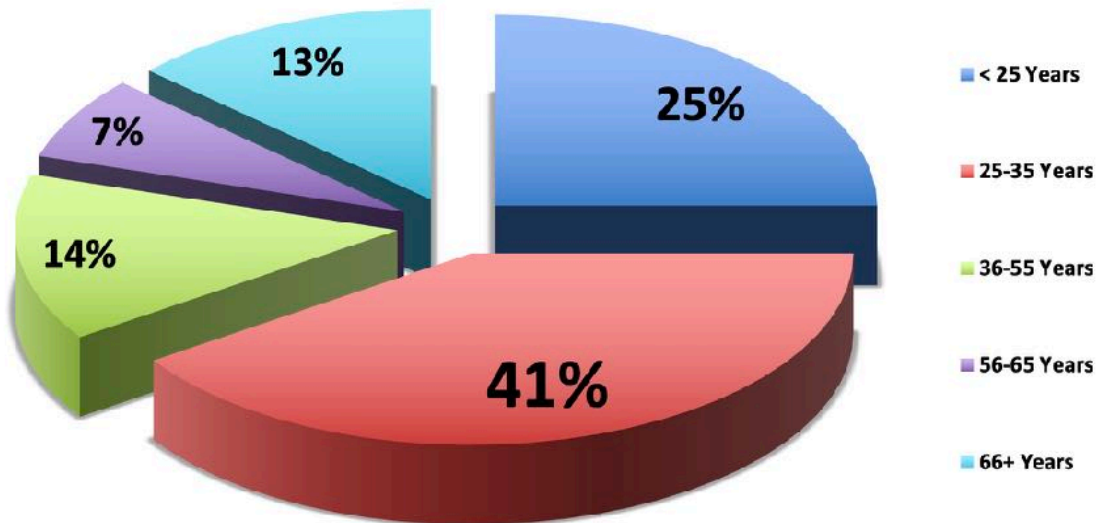


These alumni range widely in age with 6% being over 65 years of age and old enough to remember when this truck was still in regular use:



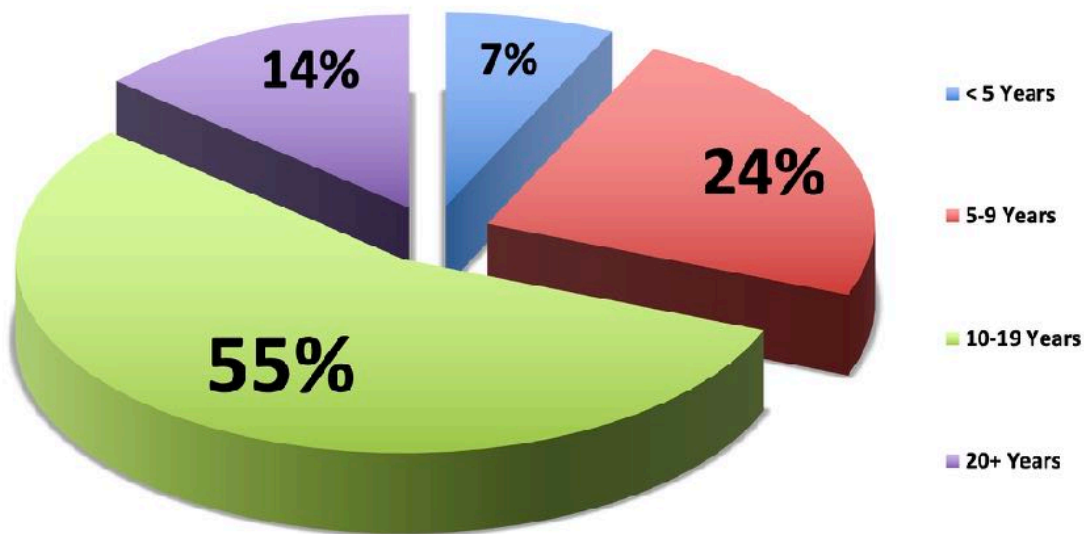


## Age Breakdown of Alumni



As the chart indicates alumni from decades ago still feel part of the camp community. Fully 69% of summer camp alumni said they spent more than 10 years of camping through a combination of their time spent as campers, counselors or other employees of summer camps. This is a strong indication of the remarkable tradition that is summer camping in the Poconos.

## Years Spent at Camp



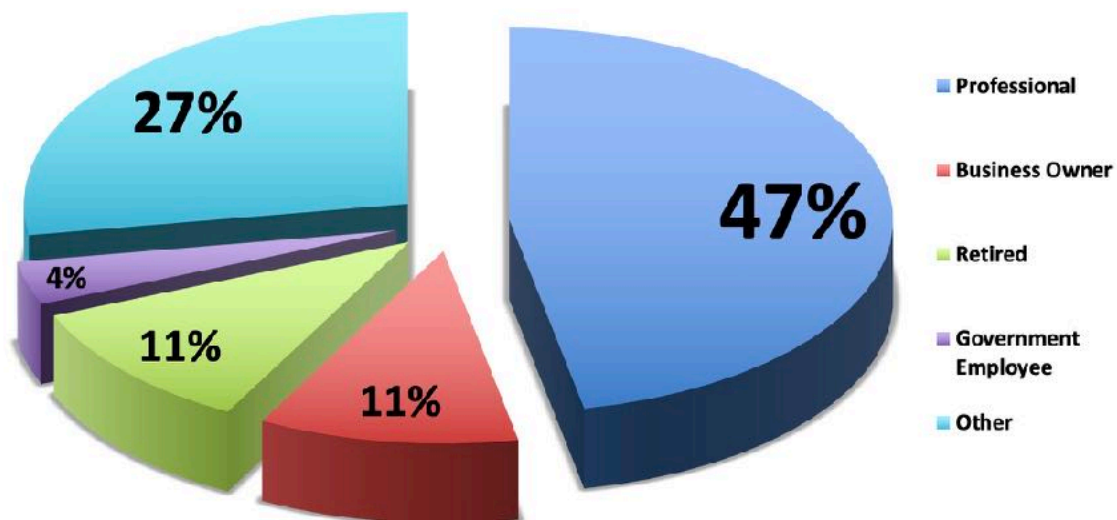
# The Economic Impact of the Greater Pocono Summer Camp Industry

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Summer camp alumni have grown and widened their horizons through their camping experiences and have taken the life lessons learned into successful careers benefiting the communities from which they come. They are, today, professionals (47%), business owners (11%), retirees (11%) and members of wide-ranging industries, as the following chart illustrates.

## Summer Camp Alumni Occupations



# The Economic Impact of the Greater Pocono Summer Camp Industry

Alumni were also queried about their summer camp experience and offered the following:

Alumni Views on Camp Experiences			
Statement	Agree	Strongly Agree	Total Agree
Camp was a defining moment in my life	94%	5%	99%
Camp gave me a better appreciation of the outdoors and rural life	77%	17%	94%
Camp led to me wanting to send my own children to camp	85%	7%	92%
I am impressed with the investments and improvements made at my camp	67%	23%	90%
Camp made me want to come back to the region to visit in later life	60%	27%	87%
Camp led to become a counselor/employee at the camp in later life	75%	11%	86%
Camp introduced me to businesses, communities and attractions I later revisited	37%	34%	71%
I continue to spend as much time as possible visiting the camp I attended	44%	26%	70%
Camp made me want to invest in the region	14%	22%	36%
Camp made me want to purchase or rent a second-home in the region	8%	23%	31%

The beneficial aspects of summer camp experiences on campers and on the Greater Pocono region as a whole is very evident in these responses.

Alumni were also asked which of these measures would be most likely to get them to recommend more people to attend the summer camp they attended or another one in the region. This chart illustrates the ratings for each answer:

Which of these would be most likely to get you to recommend more people to attend the summer camp you attended or another one in the region?					
Statement	Very Likely	Likely	Not Sure	Not Likely	Very Unlikely
Improved facilities	41%	40%	11%	4%	3%
New and different recreational offerings	32%	46%	13%	4%	3%
Improved programs	32%	45%	15%	4%	3%
More lodging opportunities in the area for parents	21%	32%	30%	12%	4%
Longer season	14%	22%	37%	15%	9%
More opportunities to visit off-site attractions	7%	29%	38%	19%	6%
Shorter season	2%	4%	27%	30%	35%

## The Economic Impact of the Greater Pocono Summer Camp Industry

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The answers suggest Greater Pocono summer camps have found the right formula for best serving the community to which they market. They've done so by improving their facilities with major investments over the last two decades and by continually improving their offerings and programs.



# The Economic Impact of the Greater Pocono Summer Camp Industry

## 5.0 Contributions of the Camp Industry to the Local Economy

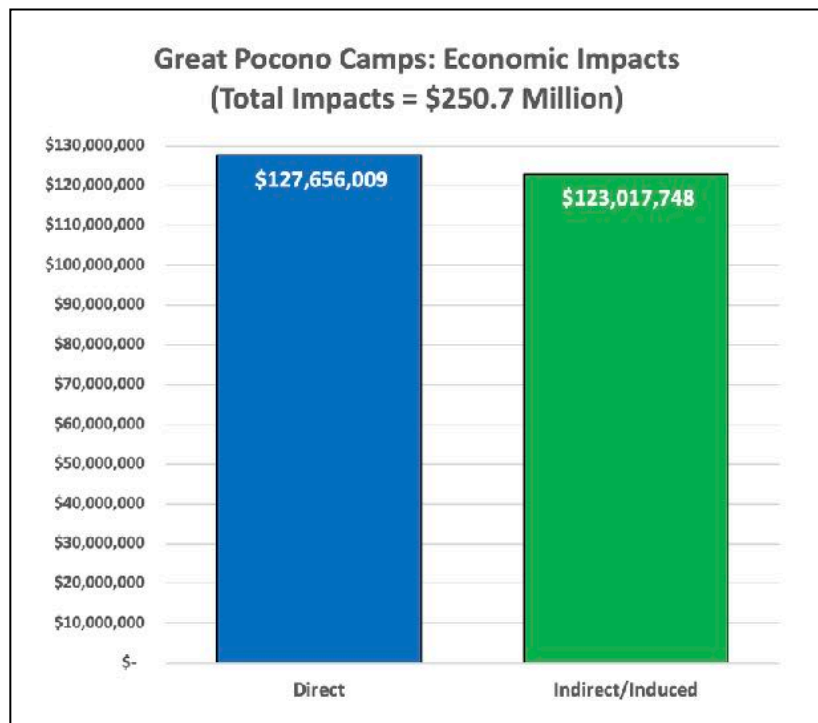
The foregoing data on direct impacts of the camping industry within Wayne County and adjoining areas of Monroe, Pike and Susquehanna Counties indicate it is a \$284 million annual business. Not all of this money is spent locally but much of it is. Surveys indicate local expenditures for payroll, food, transportation, entertainment, retail goods, utilities and other goods and services averaged \$972,643 million per camp in 2022.

Extrapolated to the 68 Greater Pocono region camps, this represents an estimated \$66.1 million of direct impact from mainstay summer camping activities. Parent tourism expenditures (estimated at \$51.7 million must be added, along with charitable contributions (\$0.7 million) and property taxes (\$9.1 million) represent additional contributions to the economy, bringing the total direct economic impact to \$127.7 million.

These figures, however, do not measure the full economic impact of camping on the local economy, as monies spent locally get recycled several times. When a local camp purchases recreation services from a local provider, for example, some portion of those dollars get reinvested in the community to pay other local suppliers (e.g. the garage that maintains the business vehicles). Some portion of those dollars similarly get re-spent to hire mechanics and the mechanic buys coffee at a convenience store.

The cumulative impact of these expenditures down to the level that little or nothing is left to spend in Wayne County is known as the multiplier effect. There are both indirect (supplier-related) and induced (income) impacts. A March 2023 study entitled "Economic Impact of Travel and Tourism" was conducted by a division of Oxford Economics for the Pennsylvania Office of Tourism regarding 2021 tourism within the Commonwealth. It calculated the combined multiplier effects (both indirect and Induced) amounted to 1.96 times the direct impact.

A dollar of summer camp spending, therefore, generates up to \$1.96 of total economic impact after circulating through the economy. The \$127.7 million of direct camp impacts, therefore, represents up to \$250.7 million of total economic impact. within the Greater Pocono region.



# The Economic Impact of the Greater Pocono Summer Camp Industry

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Likewise, Pocono camps employed an estimated 8,800 persons (460 full-time and 8,340 part-time) in 2022, about 12.3% or 1,080 of whom were hired locally. Applying the 1.52 employment multiplier from the aforementioned study indicates the summer camping industry created another 4,600 indirect and induced jobs for a total of 13,400 direct, indirect and induced Great Pocono region jobs, not to mention the economic contributions of seasonal workers from outside the region.

Recent (2021) employment statistics for Wayne County from the PA Department of Labor & Industry further substantiates the importance of the camping industry in the regional economy. It indicates accommodation and food services businesses (including camps) had the fourth highest "location quotient" of any private industry in the County. This measures "the amount of an industry located in a specific area relative to the normal average distribution. An industry matching the normal average distribution would have a location quotient of 1.00."

Accommodation and food services businesses had a 2021 location quotient of 1.60, which is up significantly from 1.47 in 2015. This means there was 1.60 times as much employment in accommodation and food services businesses in Wayne County as Commonwealth averages would suggest. This is an excellent measure of their prominence in the local economy.

These businesses also represented the fourth largest employer in the county at 11.3% of the total, after health care and social assistance (16.8%), retail trade (16.0%) and public administration (12.8%). The state average was only 7.0%. Moreover, the accommodation and food services industry paid average wages (part-time as well as full-time) of \$28,573, which was almost \$6,500 or 29.4% above the state average.



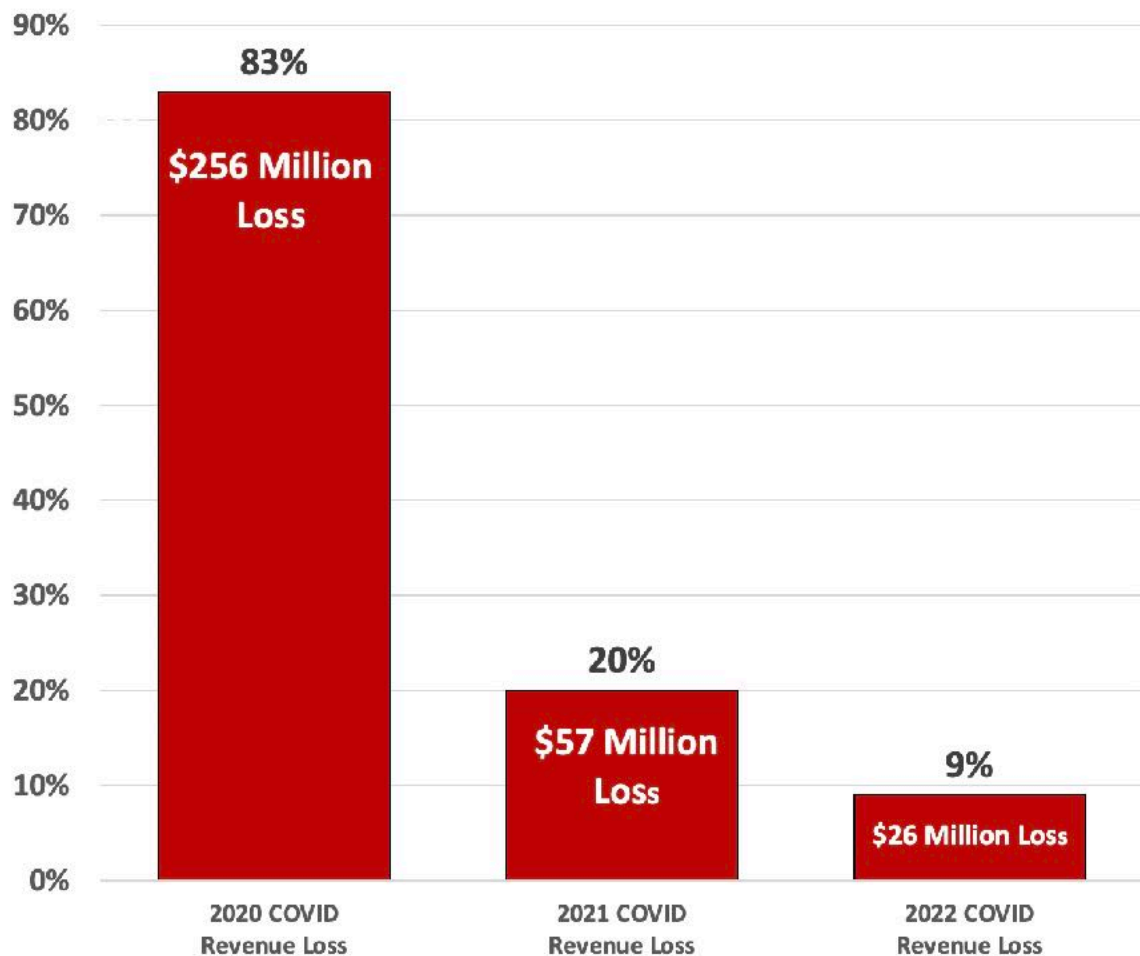
# The Economic Impact of the Greater Pocono Summer Camp Industry

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## COVID IMPACTS

During 2020, when summer camps were locked down due to the COVID pandemic, and 2021-2022, when camps still operated under various limitations with respect to the emergency declaration, the economic impact on operators and the region were severe, much more so than probably necessary, given that camping was an extremely healthy activity. Camp owners were asked to estimate their loss in revenues attributable to COVID lockdowns for those years, a question that yielded the following results given \$284 millions industry income for 2022:

## COVID Pandemic Impacts on Greater Poconos Summer Camp Industry



As the chart indicates, COVID related losses incurred by the Greater Poconos summer camp industry as a whole totaled \$338 million over the three years due to pandemic restrictions and regulations.

# The Economic Impact of the Greater Pocono Summer Camp Industry

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Camp operators were also asked to specifically estimate their individual losses and other impacts over the entire 2020-22 period.

Estimated total revenue losses for the three years in this case amounted to an average of \$7.8 million per camp or a total of \$531 million. Net revenue losses were estimated at \$2.5 million per camp or a total of \$168 million. The \$338 million total reflected in the preceding chart falls within this range and may be considered a reasonably conservative estimate of the full impact on Greater Pocono camps.

Camps also estimated they deferred an average of \$897,800 in capital investments for the 2020-22 period, a total of \$61 million for the Greater Poconos camp industry as a whole.

Likewise, camps indicated they reduced payroll for that period by an average of \$858,000 per camp or \$58 million in total for the regional summer camp industry.

Taken together, these numbers suggest the Greater Poconos summer camp industry suffered a negative economic impact approaching half a billion dollars as a result of COVID and the government response to it.





# The Economic Impact of the Greater Pocono Summer Camp Industry

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## 6.0 Recommendations

This study of the economic impacts of Pocono summer camp industry has revealed some needs of the industry and suggested some measures that might be taken to further improve it. These include the following:

- A. There is a continuing need to make information on the contributions of the camping industry available to local citizens and officials. Broad distribution of this report on a continuing basis is recommended as one way of accomplishing this. Initial distribution should be accompanied by a Pennsylvania Camp Association news release. Presentations should be scheduled with local officials. A copy should also be made available through various camping websites.
- B. There is also a need to continue efforts made over the last several years to create lasting positive relationships between camps and the communities in which they are located. More residents are now aware of the major economic contributions of the industry, but not necessarily the scale. Some camps make their recreational facilities available for community use before and after the season. School facilities, likewise, can be made available to camps for some of their programs during the summer. Some camps have, from time to time, also made programs available to local residents free of charge as a good will gesture.



- C. Camps also face some special challenges in dealing with government and utilities. Most owners are from out-of-state and have only a limited understanding of Pennsylvania government. Likewise, public officials, who only get to deal with camps for a few weeks each year, tend to not know much about their operations. When problems arise they often don't get to deal with them before the season is over and so the situation is recycled to the next year. Economic development agencies and local governments need to continue to be involved in these issues, as advocates for both the industry and the communities where it operates.

## **APPENDICES:**

**1 - Camp Survey Form**

**2 - Employee Survey Form**

**3 - Parent Survey Form**

**4 - Alumni Survey Form**

**5 - Vendor Survey Form**

# **APPENDIX 1**

## **Camp Survey Form**



## Pennsylvania Camp Association Camp Survey 2022

Shepstone Management Company, Inc. has been employed by the Pennsylvania Camp Association to update an economic impact study prepared several years ago and which was very helpful in documenting the importance of the summer camp industry to the region and the Commonwealth of Pennsylvania.

The update will analyze the results of this survey, other surveys and still other data being assembled to assess the importance of the camp industry. The study will be used to: 1) demonstrate the impact of the camp industry to the area; 2) promote the voice of the industry in the Pennsylvania General Assembly and Senate; and 3) let the leadership and community know the added value camps contribute to the area economy and quality of life.

The following is brief survey you can use to help us. All information is strictly confidential.

Thank you very much!

**HINT:** Please do **NOT** use any punctuation (e.g., "\$", commas, decimals or "&"). Use numbers only. For example, enter 64000 **NOT** \$64,000.00

1. Name of organization:



**2. Address:**

**3. Contact info:**

Phone:

Fax:

Website:

E-Mail:

**4. Contact Person:**

**5. Name of president or executive director:**

**6. Name of the municipality where camp is located:**

**7. How long has your camp been in existence?**

**8. Total land area of your camp (acres):**

**9. Land in direct use for operation (acres):**

**10. How much lake frontage (in feet) do you have, if any?**

**11. Do you have a gym, recreation hall or similar facility?**

☐ No

☐ Yes

**12. If you answered the above question yes, how many people can the facility hold?**

**13. To what extent is the camp used for other than traditional camp purposes? (Please be as specific as possible.)**

**14. What were your total operating expenses devoted to camp purposes for the past year?**  
**(All goods, services, wages, maintenance, etc.)**

**15. How much new capital have you invested in camp improvements and upgrades over the last 5 years?**

**16. What do you expect to invest over the next 5 years?**

--

**17. Please estimate your annual food expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**18. Please estimate your annual transportation expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**19. Please estimate your annual advertising expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**20. Please estimate your annual payroll expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**21. Please estimate your annual camper entertainment expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**22. Please estimate your annual retail expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	
Non-Local	<table border="1"><tr><td></td></tr></table>	

**23. Please estimate your annual utilities (phone, electric, water, etc.) expenditures:**

Locally	<table border="1"><tr><td></td></tr></table>	

Non-Local

**24. Please estimate your annual services (laundry, electricians, etc.) expenditures:**

Locally

Non-Local

**25. Please provide information on the types of medical facilities and personnel available at your camp:**

**26. Where do you go for emergency health service? (e.g. Wayne Memorial)**

**27. How often did you use local police or fire protection services this year?**

☐ Never

☐ 2 times

☐ Once

☐ 3 times +

**28. Were they efficient in meeting your needs?**

☐ Yes

☐ No

**29. What fire company services your area?**

**30. Does your camp have any bank deposits in Monroe, Pike, Susquehanna or Wayne Counties?**

☐ Yes

☐ No



**31. If yes, what was the total amount for this year?**

**32. Does your camp have any mortgage accounts in Monroe, Pike, Susquehanna or Wayne Counties?**

☐ Yes

☐ No

**33. If yes, what was the total amount for this year?**

**34. Does your camp have any mortgage accounts in other regional banks such as those in Lackawanna, Luzerne or the Lehigh Valley?**

☐ Yes

☐ No

**35. If yes, what was the total amount for this year?**

**36. Total charitable contributions your camp made this to community groups (e.g. fire company, hospital, Red Cross)?**

**37. Estimate the amount of taxes paid by your camp this year:**

PA Sales Tax:

Local School District:

Local County:

Local Municipality:

**38. How many on-site employees does your camp have:**

Full Time:

Part Time:

**39. How many of these employees are hired locally?**

**40. What date does your camp typically open?**

**41. What date does your camp typically close?**

**42. What off-season events do you conduct, if any (please be specific)?**

**43. If parents of campers are invited to attend during the season, please estimate the numbers of persons who visited during the season.**

**44. Number of campers during this season:**

**45. Camper fees for this past season:**

Entire season:

Month's stay:

Week's stay:

**46. Your camp may be used for other purposes than directing camping (e.g. banquets, conferences, meetings, retreats, weddings, reunions). Please estimate this for this year.**

Estimated number of persons  
attending events:

Camp revenue derived from  
these types of uses:

**47. Please provide as much additional information as possible relative to your economic impact that may not have been covered by the about questions.**

**48. Offer any general comments or observations relative to your camp that you feel might be helpful to the consultants:**

**49. Please offer any ideas or suggestions for this study or ideas and suggestions for local officials and others regarding your industry.**

**50. Are you a member of the Pennsylvania Camp Association?**

☐ Yes

☐ No

**51. How much of a percentage loss in gross revenue did your camp experience as a result of COVID in 2020?**

0%

100%

52. How much of a percentage loss in gross revenue did your camp experience as a result of COVID in 2021?

0% 100%



53. How much of a percentage loss in gross revenue did your camp experience as a result of COVID in 2022?

0% 100%



54. How much gross revenue in total do you believe your camp lost as a result of COVID from 2020 through 2022? **(Enter without punctuation)**

55. How much in total do you believe your camp lost in net revenue as a result of COVID from 2020 through 2022? **(Enter without punctuation)**

56. How much in total did your camp reduce expected capital expenditures as a result of COVID from 2020 through 2022? **(Enter without punctuation)**

57. How much in total did your camp reduce its payroll as a result of COVID from 2020 through 2022? **(Enter without punctuation)**

58. What else can you tell us about how COVID impacted your camp operation?



**Thank you for your participation in the important study!**

**If you have any questions, please contact Shepstone Management Company, Inc. at 570-251-9550 or [mail@shepstone.net](mailto:mail@shepstone.net).**

Done

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## **APPENDIX 2**

# **Employee Survey Form**



## Pennsylvania Camp Association Employee Survey 2022

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The update will analyze the results of this survey, other surveys and still other data being assembled to assess the importance of the camp industry. The study will be used to: 1) demonstrate the impact of the camp industry to our area; 2) promote the voice of the industry in the Pennsylvania General Assembly and Senate; and 3) let the leadership and community know the added value camps contribute to the area economy and quality of life.

The following is brief survey you can use to help us. All information is strictly confidential. We don't even need your name.

You can either complete and return this copy to:

Shepstone Management Company, Inc.,  
100 4th Street  
Honesdale, PA 18431

or, preferably, simply complete it online below.

Completing the survey will take you 5 minutes or less. Thank you very much!

**HINT: Please do NOT use any punctuation (e.g., "\$", commas, decimals or "&"). Use whole numbers only. For example, enter 27000 NOT \$27,000.00 if a number is requested.**

**1. Name of camp:**

**2. What nation do you come from?**

**3. If you come from the U.S., which state?**

**4. No. of years you have worked at this camp:**

**5. Approximate number of days you worked at this camp during the past year:**

**6. Please rate your over all level of satisfaction with your job at this camp:**

☐ Excellent

☐ Fair

☐ Good

☐ Poor

**7. Please tell us why you chose to work at this camp? (CHECK TOP TWO)**

☐ Closeness of job to home

☐ Seasonal nature of work



- |  |   |
|--|---|
| <input type="checkbox"/> Enjoyability of the work  | <input type="checkbox"/> Opportunity for advancement          |
| <input type="checkbox"/> Level of pay and benefits | <input type="checkbox"/> Referred by friends/family or alumni |
| <input type="checkbox"/> University internship     |   |
| <input type="checkbox"/> Other (please specify)    |   |

**8. How much did you earn in salary or wages from this camp the last year?**

**9. How long do you expect to continue to work at this camp?**

- ☐ 1-2 Years
- ☐ 2-5 Years
- ☐ 5-10 Years

**10. Has working at this camp made you more or less likely to stay in this area?**

- ☐ Less likely
- ☐ More likely

**11. Do you feel the value of this camp is fully appreciated by the community?**

- ☐ Yes
- ☐ No

**12. Do you feel the community is fully appreciated by the camp?**

- ☐ Yes
- ☐ No

**13. Do you make local purchases for the camp?**

- ☐ Yes

☐ No

**14. Please tell us, by town and in order of importance, where most of these purchases are made.  
(e.g. Honesdale, Lakewood, Hancock, Hawley, Stroudsburg, Mt. Pocono, Milford)**

1)

2)

3)

**15. Please tell us any other important contributions this camp makes to the area:**

Done

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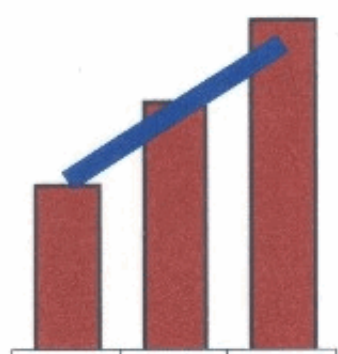


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## **APPENDIX 3**

### **Parent Survey Form**



*Shepstone*  
*Management Company*

**Planning & Research Consultants**

### Pennsylvania Camp Association Parent Survey 2022

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Shepstone Management Company, Inc.,  
100 4th Street  
Honesdale, PA 18431



**or, preferably, simply complete it online below.**

Completing the survey will take you 5 minutes or less. Thank you very much!

**1. Name of camp:**

**2. Your city & zip code of residence:**

City

Zip code

**3. No. of children you had at this camp this past year:**

**4. No. of children you've sent to this camp over the years:**

**5. Please rate your overall level of satisfaction with this camp:**

☐ Excellent

☐ Good

☐ Fair

☐ Poor

**6. Are you a former summer camper yourself?**

☐ No

☐ Yes

**7. Have you ever worked at a summer camp as an employee?**

☐ No

☐ Yes

**8. Please tell us why you chose this camp for your children? (CHECK TOP TWO)**

☐ Quality of location

☐ Value of package

☐ Quality of facilities

☐ Religious affiliation

☐ Quality of programs

Other (please specify)

**9. Name of the municipality/township where this camp is located:**

**10. Please rate your level of satisfaction with the area in which this camp is located:**

☐ Excellent

☐ Good

☐ Fair

☐ Poor

☐ Not Sure

**11. Has visiting this camp in the past made you want to visit the area for other reasons?**

☐ Yes

☐ No

**12. Has visiting this camp made you want to move to this area or have a second home here?**

☐ Yes

☐ No

**13. Has visiting this camp in the past made you want to consider investing in the area/**

☐ Yes

☐ No

**14. How many times did you typically visit the camp during pre-COVID years?**

**15. How many of your family typically came to visit during pre-COVID years?**

**16. How many days total did you typically spend visiting the camp during pre-COVID years?**

**17. If you made overnight visits during pre-COVID years, how many nights did you typically stay?**

**18. If you made overnight visits during pre-COVID years, where did you stay?**

☐ Hotel/Motel/B&B

☐ Friends

☐ At the camp

☐ within 50 miles of camp

**19. Please estimate your typical daily food expenditures when you have visited the camp in the past:**

Locally

Non-Local

**20. Please estimate your typical daily lodging expenditures when you have visited the camp in the past:**

Locally

Non-Local

**21. Please estimate your typical daily transportation expenditures when you have visited the camp in the past:**

Locally

Non-Local

**22. Please estimate your typical daily entertainment expenditures when you have visited the camp in the past:**

Locally

Non-Local

**23. Please estimate your typical daily retail expenditures when you have visited the camp in the past:**

Locally

Non-Local

**24. Please estimate your typical daily other expenditures when you have visited the camp in the past:**

Locally

Non-Local

Done

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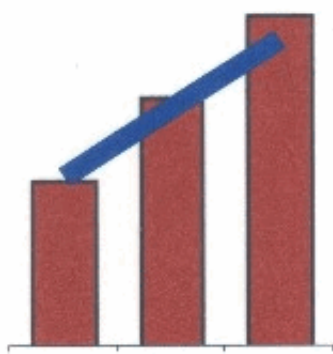
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## **APPENDIX 4**

### **Alumni Survey Form**





*Shepstone*  
*Management Company*

**Planning & Research Consultants**

### Pennsylvania Camp Association Alumni Survey 2022

Shepstone Management Company, Inc. has been employed by the Pennsylvania Camp Association to update an economic impact study prepared several years ago and which was very helpful in documenting the importance of the summer camp industry to the region and the Commonwealth of Pennsylvania.

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Shepstone Management Company, Inc.,  
100 4th Street  
Honesdale, PA 18431

**or, preferably, simply complete it online below.**

Completing the survey will take you 5 minutes or less. Thank you very much!

**1. Where do you live?**

- ☐ New York City metropolitan region
- ☐ Other areas of New York State
- ☐ Pennsylvania
- ☐ New Jersey
- ☐ Connecticut
- ☐ Another state
- ☐ Another country

**2. What is your age?**

- ☐ Under 25 years
- ☐ 25-35 years
- ☐ 36-55 years
- ☐ 56-65 years
- ☐ 66 years or older

**3. How long, all together, have you been a camper (including your time as a summer camp attendee, as a counselor or as an employee)?**

- ☐ Under 5 years
- ☐ 5-9 years
- ☐ 10-19 years
- ☐ 20 years or more

**4. What is your occupation?**

- ☐ Business owner
- ☐ Professional services (medical, legal, etc.)

- ☐ Government employee
- ☐ Retired
- ☐ Other (please specify)

**5. Please tell us whether you agree or not with these statements.**

	Strongly Agree	Agree	Neither Agree Nor Disagree	Disagree	Strongly Disagree
I am impressed with the investments and improvements made at my camp to improve the quality of the experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I continue to spend as much time as possible visiting the summer camp I attended	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My summer camp experience gave me a better appreciation of the outdoors and rural life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My summer camp experience led to become a counselor/employee at the camp in later life	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My summer camp experience led to me wanting to send my own children to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

camp to experience  
the same things

My summer camp  
experience made  
me want to come  
back to the region  
to visit in later life

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

My summer camp  
experience made  
me want to invest in  
the region

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

My summer camp  
experience made  
me want to  
purchase or rent a  
second-home in the  
region

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

My summer camp  
experience was a  
defining moment in  
my life

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

Visiting the region  
introduced me to  
businesses,  
communities and  
attractions I  
revisited in later life

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

Other (please specify)

6. Which of these would be most likely to get you to recommend more people to attend the summer camp you attended or another one in the region? [Please rank each]

	Very Unlikely	Not Likely	Not Sure	Likely	Very Likely
Improved programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

New and  
different  
recreational  
offerings

☐☐☐☐☐

Shorter  
season

☐☐☐☐☐

Longer  
season

☐☐☐☐☐

More  
opportunities  
to visit off-  
site  
attractions

☐☐☐☐☐

More  
lodging  
opportunities  
in the area  
for parents

☐☐☐☐☐

Other (please specify)

**7. What was the one thing you liked best about your summer camping experience?**

**8. My summer camping experience has enhanced my life in the following ways (please list or describe):**



9. Would you be willing to help market our camping industry?

☐ Yes

☐ No

Done

---

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## **APPENDIX 5**

# **Vendor Survey Form**

## Pennsylvania Camp Association Pocono Vendor Survey

Shepstone Management Company, Inc. has been employed by the Pennsylvania Camp Association to update an economic impact study done six years ago and which was very helpful in documenting the importance of the summer camp industry to the Pocono region and the Commonwealth of Pennsylvania.

The update will analyze the results of this survey, other surveys and still other data being assembled to assess the importance of the camp industry. The study will be used to: 1) demonstrate the impact of the camp industry to the area; 2) promote the voice of the industry in the Pennsylvania General Assembly and Senate; and 3) let the leadership and community know the added value camps contribute to the area economy and quality of life.

The following is brief survey you can use to help us as a valued vendor to the camp industry. All information is strictly confidential. You can either complete and return this copy to:

**Shepstone Management Company, Inc.,  
100 4th Street  
Honesdale, PA 18431**

or, preferably, simply complete it online below.

Completing the survey will take you 7 minutes or less.

Thank you very much!

**HINT:** Please do **NOT** use any punctuation (e.g., "\$", commas, decimals or "&"). Use whole numbers only. For example, enter 64000 **NOT** \$64,000.00 if a number is requested.

**1. Name of Vendor:**

**2. Zip Code (so we know where you are located and what local economy may be positively affected):**

**3. Contact information (so we can contact you if we have questions):**

Phone:

E-Mail:

Website:

**4. Contact Person:**

**5. About how many summer camps do you estimate you serve in a typical year?**

**6. What services do you supply to the summer camp industry or its patrons? Please check all that apply.**

- ☐ Retail/Wholesale
- ☐ Entertainment/Recreation Services
- ☐ Health or emergency Services
- ☐ Transportation Services
- ☐ Construction/Maintenance Services
- ☐ Utility Services
- ☐ Charitable Activities
- ☐ Restaurant
- ☐ Other (please specify)

**7. Please estimate your annual revenue (sales) attributable to summer camp business during a**

**typical year, including that from camp attendees, employees and visitors:**

**8. Has your revenue related to the summer camp industry grown, stayed about the same or declined compared to five years ago?**

- ☐ Grown significantly
- ☐ Grown modestly
- ☐ Stayed about the same
- ☐ Declined slightly
- ☐ Declined significantly

**9. Would you like to develop additional business with the summer camp industry?**

- ☐ Yes
- ☐ Perhaps
- ☐ Not at this time

**10. Do you typically hire additional help or ask employees to work additional hours during summer camp season to deal with the additional business?**

- ☐ Yes
- ☐ No

**11. Do you experience additional business as a result of activities occurring before or after summer camp season in camp facilities (e.g., banquets, special camps, sporting events, weddings)?**

- ☐ Yes
- ☐ No

**12. How did COVID lockdowns and the impacts of less summer camping business impact your business or enterprise?**

- ☐ Had a major negative impact
- ☐ Had a serious but modest negative impact

☐ Had no significant impact

**13. Please provide any additional information regarding the value of the summer camping industry to your enterprise that may not have been covered by the above questions.**

***Thank you for your participation in the important study!***

***If you have any questions, please contact Shepstone Management Company, Inc. at 570-251-9550 or [mail@shepstone.net](mailto:mail@shepstone.net).***

Done

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