

The Economic Impacts of the Pocono Summer Camp Industry



Prepared for:

The Wayne County Camp Alliance

by:

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(Assisted by Wayne County Planning Department)

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The Economic Impact of the Pocono Summer Camp Industry

Acknowledgments

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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 within Wayne, Pike and Monroe Counties and 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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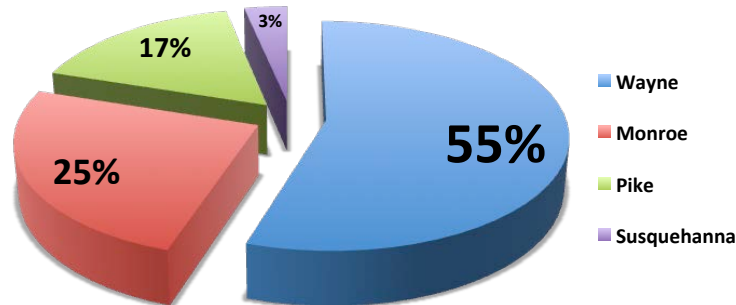
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Summary of Key Findings

Here are a few of the key findings from four surveys of the Pocono summer camp industry, which were answered by 18 camps, 417 camp alumni, 103 employees and 315 parents.

Pocono Region Summer Camps



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 Pocono economy for 66 years.

Camps preserve valuable open space

Just those 18 camps responding to the survey represented over 5,000 acres of largely open land. The average camp is approximately 280 acres in size and uses 105 acres in operations, the remainder being preserved as open space.



Camps are major businesses

The average camp spends over \$3.5 million on operations, some \$1.5 million of it locally. The total direct and indirect impact on the regional economy is an estimated \$123 million annually.

Camps represent major investments in the local economy

Camps invested an average of \$3 million to improve their facilities over the last five years. It is anticipated Pocono camps as a whole will, going forward, spend \$30 million per year upgrading.

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Camps are large taxpayers

Wayne County camps alone paid over \$2.5 million in property taxes in 2016. The average taxpaying camp paid over \$101,000 in local property taxes. Analysis of Wayne County assessment data indicates camps pay from 12% to 25% of those taxes in the top five camp communities and 2.3% of property taxes countywide.



Camps are excellent employers

Some 81% of employees (19% of which among US employees were from Pennsylvania) rated their level of job satisfaction as “excellent” with another 16% giving a “good” rating, primarily based on their enjoyment of the work (49%) and its seasonal nature (23%).

Camps buy local

Camp employees indicated their first, second and third choices for local purchases were

Honesdale, Hancock and Scranton businesses. These included \$141,400 per camp in food expenditures, for example, some 47% of all food purchases. It also included \$337,500 per camp in payroll paid to local employees.

Camps are quality businesses and representatives of the area

Some 95% of camper parents rated the facilities used by their children as “excellent.” Reasons included quality of programs (36%), quality of the facilities (22%) and the leadership, reputation and value of the camp (16%).

Camps create other tourism

Some 46% 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 \$405 per day in the region on lodging, dining and other services.



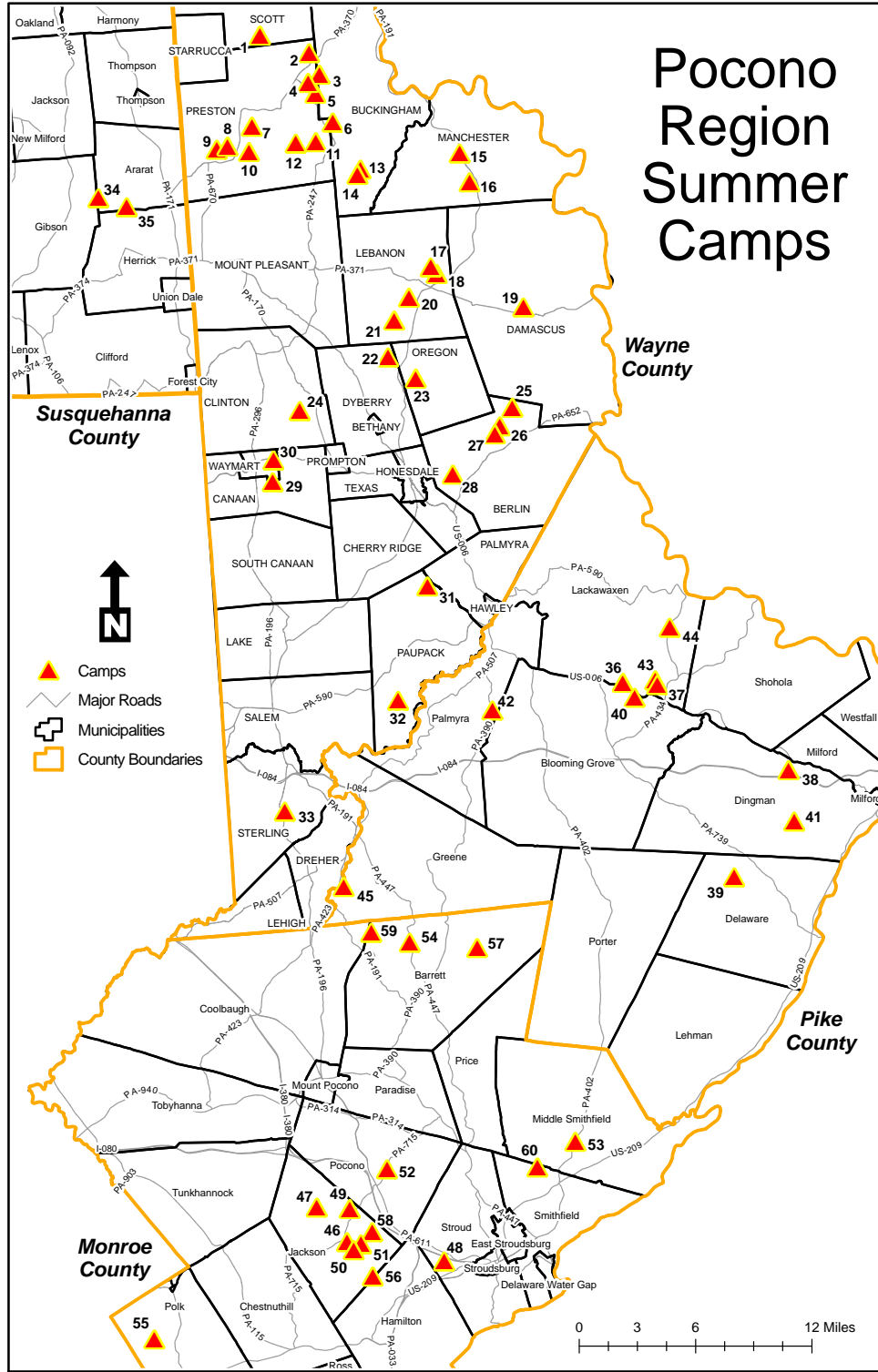
Camps introduce investors to the area

Some 16% of camper parents stated that visiting the camp made them want to consider investing in the area and 20% of alumni say the same thing.

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Pocono Region Summer Camps			
No.	Camp	Municipality	County
1	Island Lake Camp	Scott	Wayne
2	Camp Starlight	Buckingham	Wayne
3	Perlman Camp	Buckingham	Wayne
4	Camp Wayne for Girls	Preston	Wayne
5	Camp Wayne for Boys	Buckingham	Wayne
6	Camp Morasha	Buckingham	Wayne
7	Camp Zeke	Preston	Wayne
8	Camp Westmont	Preston	Wayne
9	Camp Independent Lake	Preston	Wayne
10	Cap Poyntelle/Lewis Village	Preston	Wayne
11	Camp Weequahic	Preston	Wayne
12	Camp Nesher/Shosshanim	Preston	Wayne
13	Camp Lavi	Buckingham	Wayne
14	Camp Ramah in the Poconos	Buckingham	Wayne
15	Camps Equinunk & Blue Ridge	Manchester	Wayne
16	Indian Head Camp	Manchester	Wayne
17	Camp Raninu	Lebanon	Wayne
18	Camp Summit	Lebanon	Wayne
19	Tyler Hill Camp	Damascus	Wayne
20	Seneca Lake	Lebanon	Wayne
21	Camp Towanda	Lebanon	Wayne
22	Camp Cayuga	Dyberry	Wayne
23	Bryn Mawr Camp	Oregon	Wayne
24	Camp Bonim	Clinton	Wayne
25	Camp Timberledge	Berlin	Wayne
26	Camp Chestnut	Berlin	Wayne
27	Camp Trails End	Berlin	Wayne
28	Camp Moshava	Berlin	Wayne
29	Camp Ladore	Canaan	Wayne
30	Camp Spojnia	Waymart	Wayne
31	Camp Watonka	Paupack	Wayne
32	Goose Pond BSA Reservation	Paupack	Wayne
33	Journey's End Farm	Sterling	Wayne
34	Camp Tioga	Ararat	Susquehanna
35	Camp Chen-A-Wanda	Ararat	Susquehanna
36	Lake Owego Camp	Lackawaxen	Pike
37	Pine Forest Camp	Lackawaxen	Pike
38	Camp Nah-Jee-Wah	Dingman	Pike
39	Camp Speer YMCA	Delaware	Pike
40	Camp Timber Tops	Blooming Grove	Pike
41	Camp Netimus	Dingman	Pike
42	Camp Oneka	Palmyra	Pike
43	Lake Greeley Camp	Lackawaxen	Pike
44	Camp Lee Mar	Lackawaxen	Pike
45	Camp JRF	Greene	Pike
46	International Sports Training Camp	Jackson	Monroe
47	Mt. Gilead Camp	Jackson	Monroe
48	Kirkwood Camp	Stroud	Monroe
49	Streamside Camp	Jackson	Monroe
50	International Gymnastics Camp	Jackson	Monroe
51	Pinemere Camp	Jackson	Monroe
52	Camp Lindemere	Pocono	Monroe
53	Pocono Springs Camp	Middle Smithfield	Monroe
54	Spuce Lake Retreat	Barrett	Monroe
55	Camp Harlam	Polk	Monroe
56	Twin Pines Camp	Jackson	Monroe
57	Camp Canadensis	Barrett	Monroe
58	Golden Slipper Camp	Jackson	Monroe
59	Pocono Plateau Camp	Barrett	Monroe
60	Camp Dora Golding	Stroud	Monroe

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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 two earlier reports, was undertaken in 2016 and reveals the full extent of those contributions. It was accomplished in consultation with 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. Camps outside of the Wayne County Camp Alliance membership were also surveyed.



Alliance member organizations and other camps were invited to complete on-line surveys. Some 18 camping organizations, 417 camp alumni, 315 parents and 103 employees responded. Copies of the survey instruments used are attached as Appendix 2 of 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 and Howard J. Grossman in 2002. Therefore, the latest analysis represents the first time in 15 years that the impact of the industry on the area has been evaluated.

The Economic Impact of the Pocono Summer Camp Industry

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.

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2.0 Overview of the Summer Camping Industry

The summer camp industry has existed in Wayne County for 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 Pocono camps (primarily found in Wayne County, Pennsylvania but spread over four counties) 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 business for the area.

The Wayne County Camp Alliance includes members in Pike, Susquehanna and Wayne Counties and has close working relationships with other facilities in Monroe County. Close proximity of these counties to Manhattan is a valuable asset for Pocono 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. More parents tour camps and evaluate them before making their choice. Parents visit more often generally and are looking for complementary experiences, quality restaurants and lodging. The client base is one of very high expectations and camp owners have to continually upgrade and add to their programs to meet those expectations.

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

Camping is an extremely important industry to the region. **It pays an astounding 2.3% 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 Wayne County and surrounding localities. This report is intended to set the stage for such a continuing effort.



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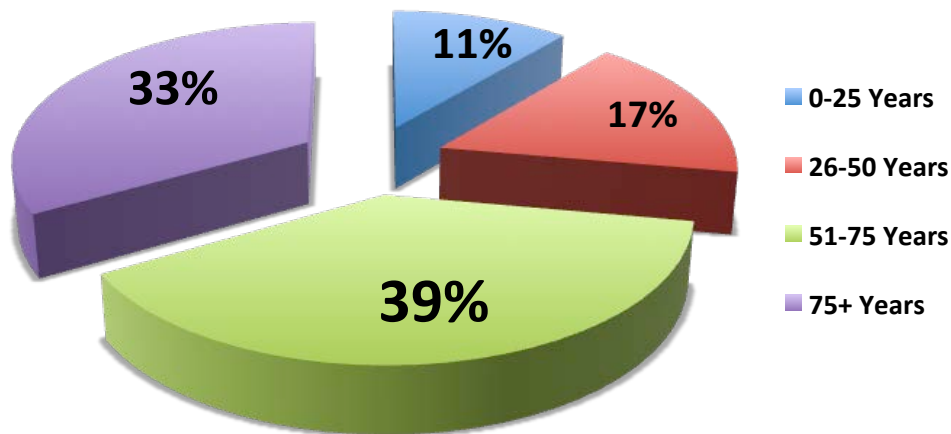
3.0 Pocono Camp Characteristics

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 following demonstrates locations of summer camps within the region. 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, many of whom are members of the Wayne County Camp Alliance. These, too, were surveyed for this study. There are, in addition, a number of other camps who are not members of the Alliance but make the same types of contributions to the economy. Camping, as a result, has a much larger presence in the region than Camp Alliance numbers alone might indicate.

Most camps have been in existence for many years (an average of 66 years), with some 72%, of the camping organizations having existed for more than 50 years. This business longevity is 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

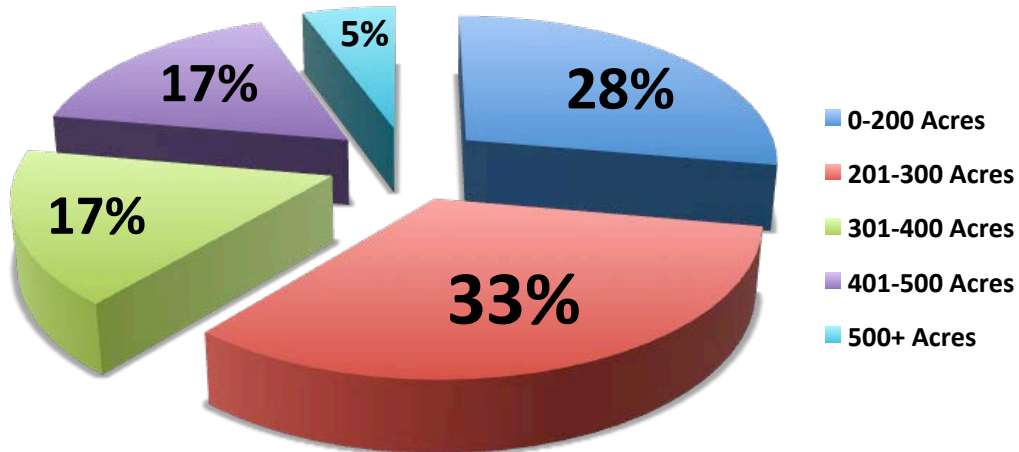


The camp industry uses a great deal of land and maintains large open spaces in many instances. Some camps are more than 1,000 acres in size, 5% are more than 500 acres and 39% are more than 300 acres. The average camp size is 280 acres. Obviously, the more acreage involved,

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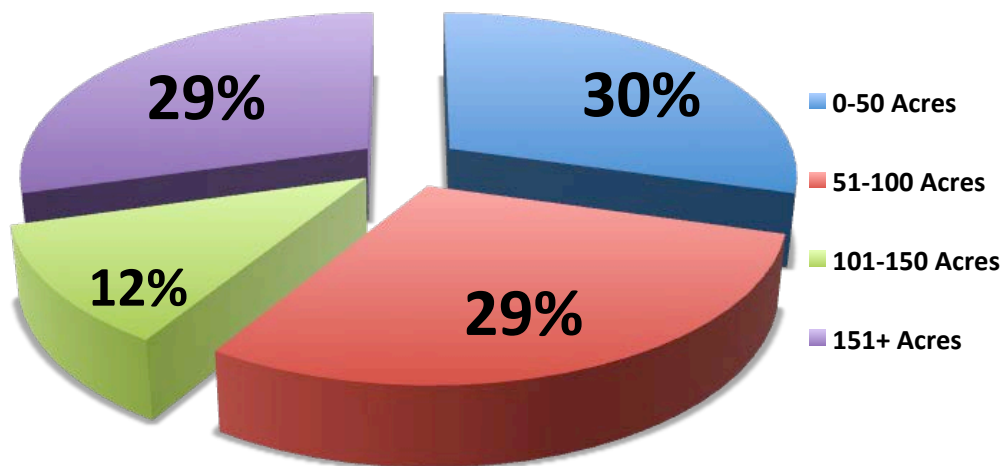
the more opportunities there are for future camp expansion and the more land that is protected as valuable open space within the community.

Camps by Land Area



Land use data indicates much of the acreage currently held by camps is not directly used in their operations. Such acreages ranges from 22 to 200 acres. The average amount of land used in direct operations is 105 acres, leaving 207 acres, on average, as open space.

Camp Land Areas Used in Operations



Lake frontage is typically very important to the summer camping industry. Most camps are, in fact, built around prominent bodies of water used for recreation and as scenic attractions. This

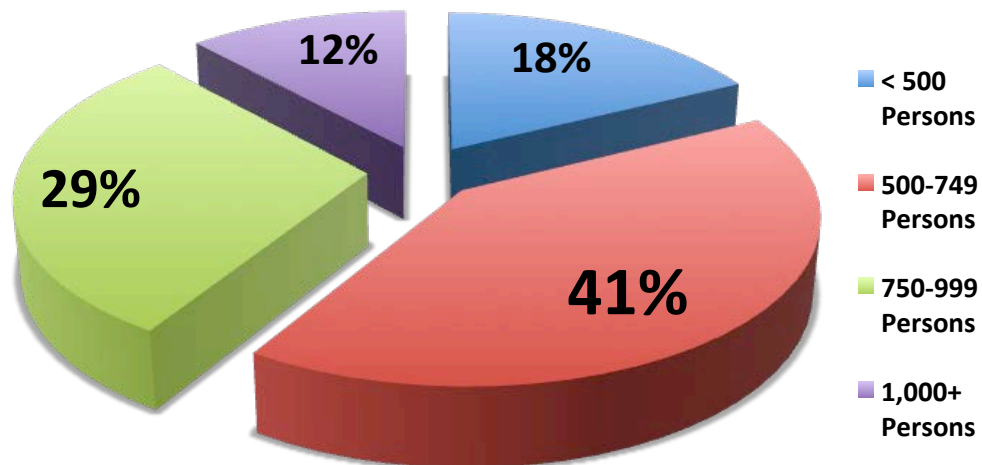
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is one of the reasons so many have located in the Poconos where there is an abundance of lakes. Lake frontage varies from 300 feet to 9,000 feet, averaging over 3,000 feet.



Infrastructure availability among camps demonstrates the versatility of the industry. Every camp surveyed has a gymnasium, recreation hall or similar large facility. These range in size from holding 300 persons to over 1,000 persons. Some 82% hold at least 500 persons and the average facility accommodates 679 persons. The ability to utilize these assets for other activities has allowed many camps to promote banquets, meetings, conferences and events at their facilities outside of the camping season, generating added economic activity for the area.

Camp Recreational Hall Capacity

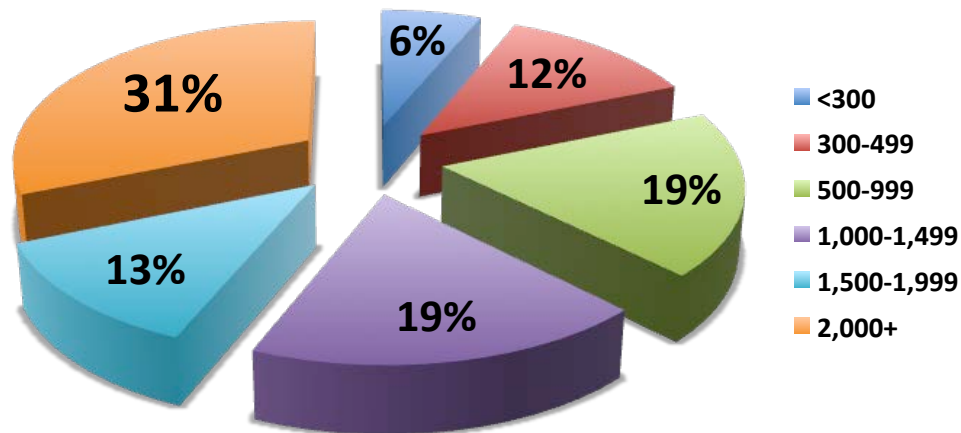


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Camp representatives were asked to identify the extent to which their facilities were used off-season for other than traditional camp purposes. Some 35% sponsored sports camps, cheerleading camps and bands, 47% accommodated retreats and picnics and, altogether, 88% employed their facilities for other than summer camp purposes. Other non-camping activities included religious celebrations, parties, corporate meetings, weddings and other 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. Closing typically occurs the third or fourth week in August, although some continue until September 1st.

Numbers of Visitors Per Camp



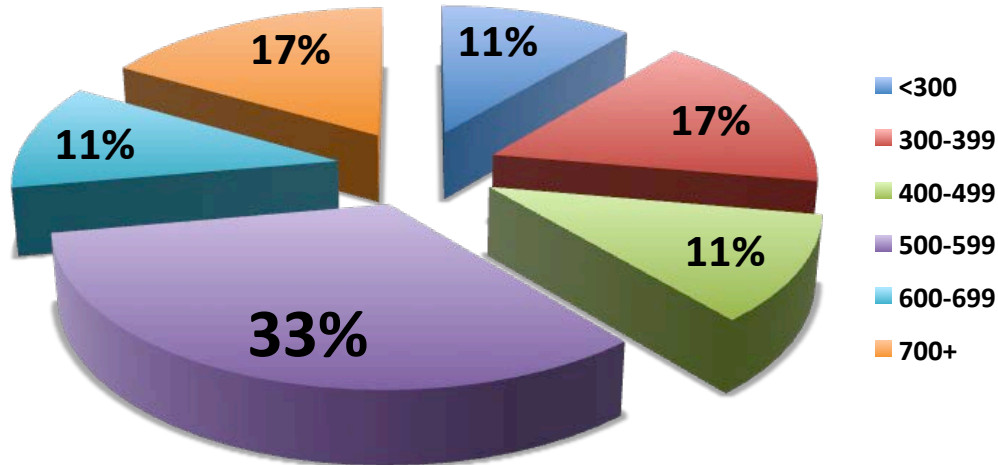
A large number of persons visit camps during the camping season. Some 63% of camps indicated they received at least 1,000 visitors during the season, with one reporting 3,500 visitors during the season. The average number of visitors was 1,556 persons per camp, which indicates total visitation to the 60 Pocono region camps of roughly 90,000 persons per year.

Many of these individuals, of course, spend money in the area 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.

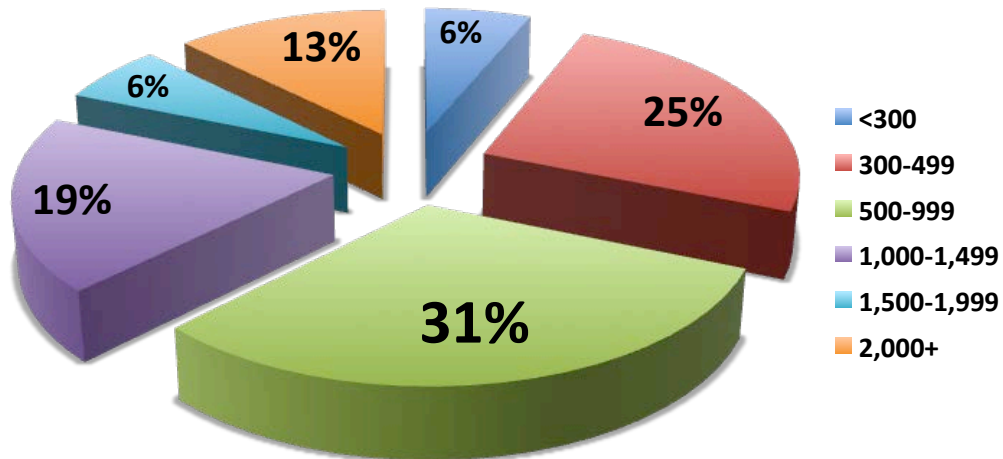
Campers themselves and other camp users are also visitors, of course. The average summer camp served 630 campers with 17% serving over 700 campers and two serving over 1,000. Camps also served an average of 961 other users. The total number of campers visiting the area annually, based on this sampling of 60 Pocono region camps, easily exceeds 35,000 persons and may well be closer to 40,000 campers. Other users amount to another 57,000 persons.

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Numbers of Campers Per Camp



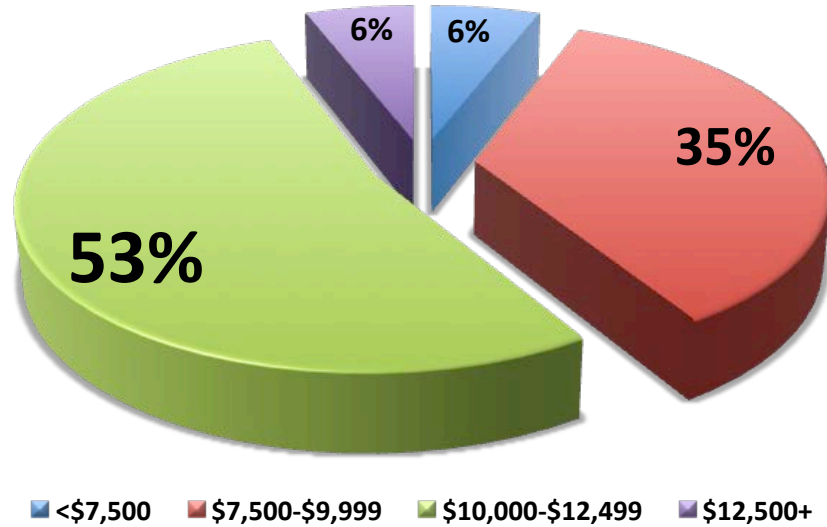
Numbers of Other Users Per Camp



Camper fees charged for the season ranged from \$7,000 to \$12,950 per person. The average fee for the season was \$10,197. Some 41% of fees are under \$10,000, while 59% are over that amount. Fees, of course, depend, to a large extent, on the length of the camping season and some camps offer multiple camping periods per season.

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Typical Camp Fees - 2015



Those camps focused on off-season use of their facilities for special events generate significant additional income for themselves and the area from these activities. Camp revenue from these sources ranged from \$40,000 to \$1,000,000 per year and averaged \$204,000 per camp.

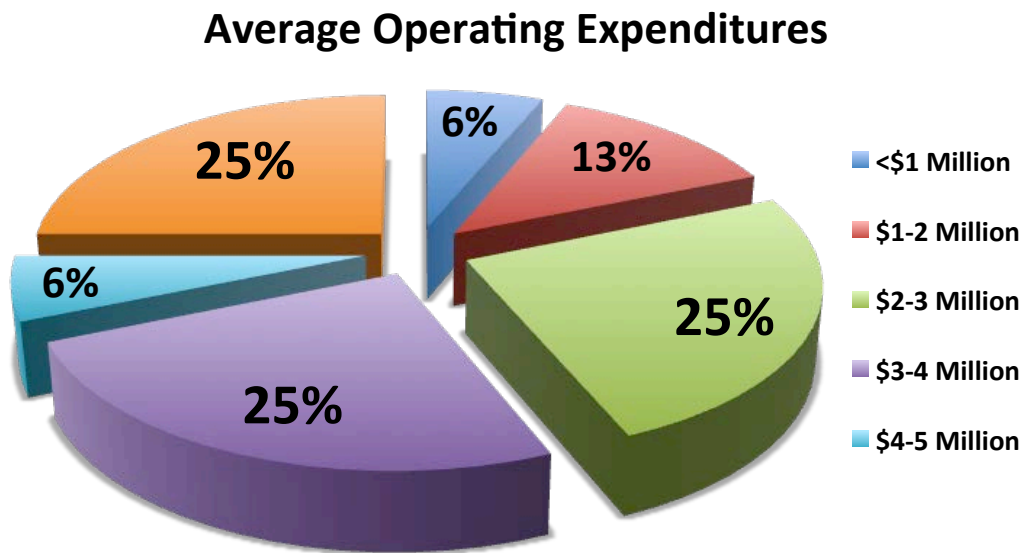


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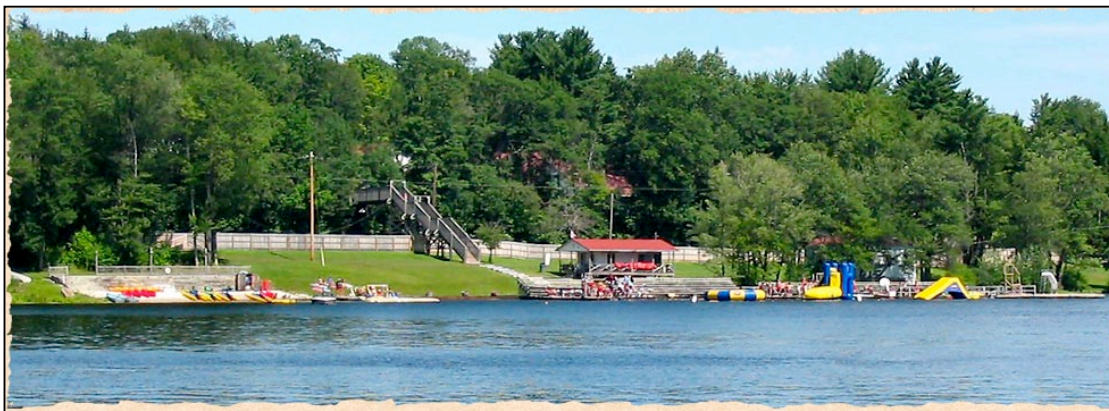
4.0 Direct Impacts of Summer Camps

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 2015. These represented monies spent on goods, services, wages, maintenance and other activities.

These operational expenditures ranged from \$800,000 to \$7.2 million. The average operating expense per camp was, in fact, \$3,600,000 per year, indicating the 60 Pocono region camps spend as much as \$215 million annually.



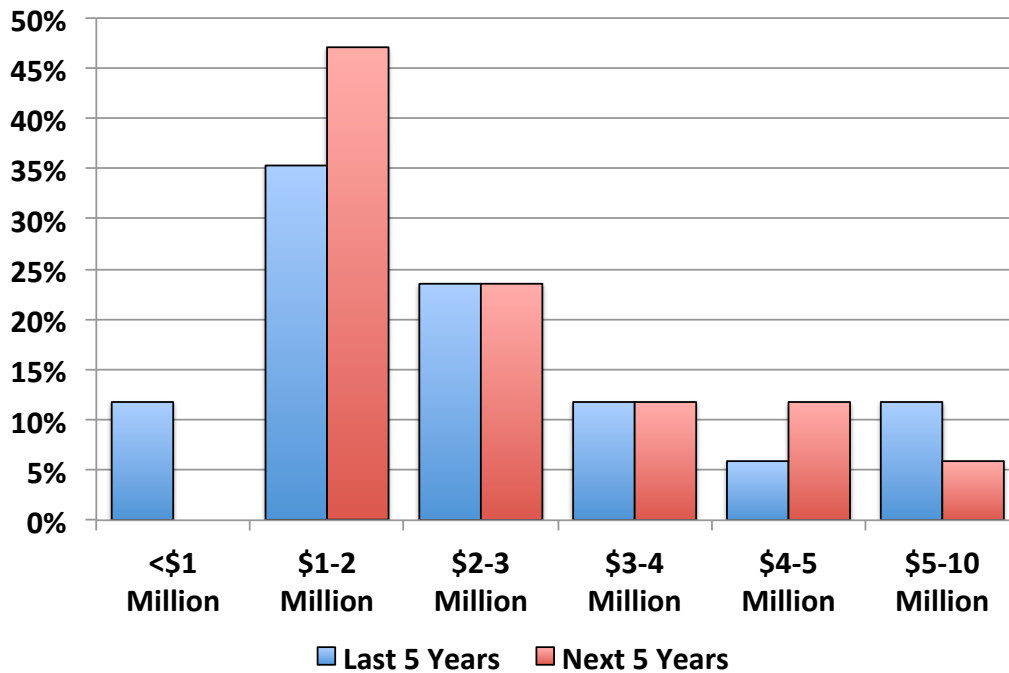
Continued capital investment is critical to the long term success of any business. Camps have been exemplary in this regard. This helps to explain their longevity as enterprises.



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The average capital investment made over the last five years (from 2011-2015) by those camps surveyed was \$3 million and going forward owners expect to spend an average of \$2.5 million or \$500,000 per year. Extrapolating these figures for all 60 Pocono region camps suggests the camp industry as a whole is investing approximately \$30,000,000 per year of new capital in the regional economy. This consistent investment helps protect existing employment while creating additional work opportunities for the future.

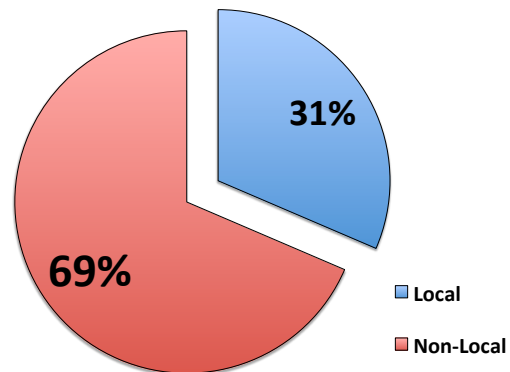
Capital Investments



Annual expenditures in several individual categories were also queried.

Payroll expenses represent the single largest category of camp expenditures at an average of \$1,072,721 annually per camp, of which \$337,529 was spent locally and \$735,192 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 two instances.

Typical Camp Payroll Expenditures



For example, food expenditures made locally

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averaged \$141,406. This compares to an average of \$162,000 spent non-locally on food.

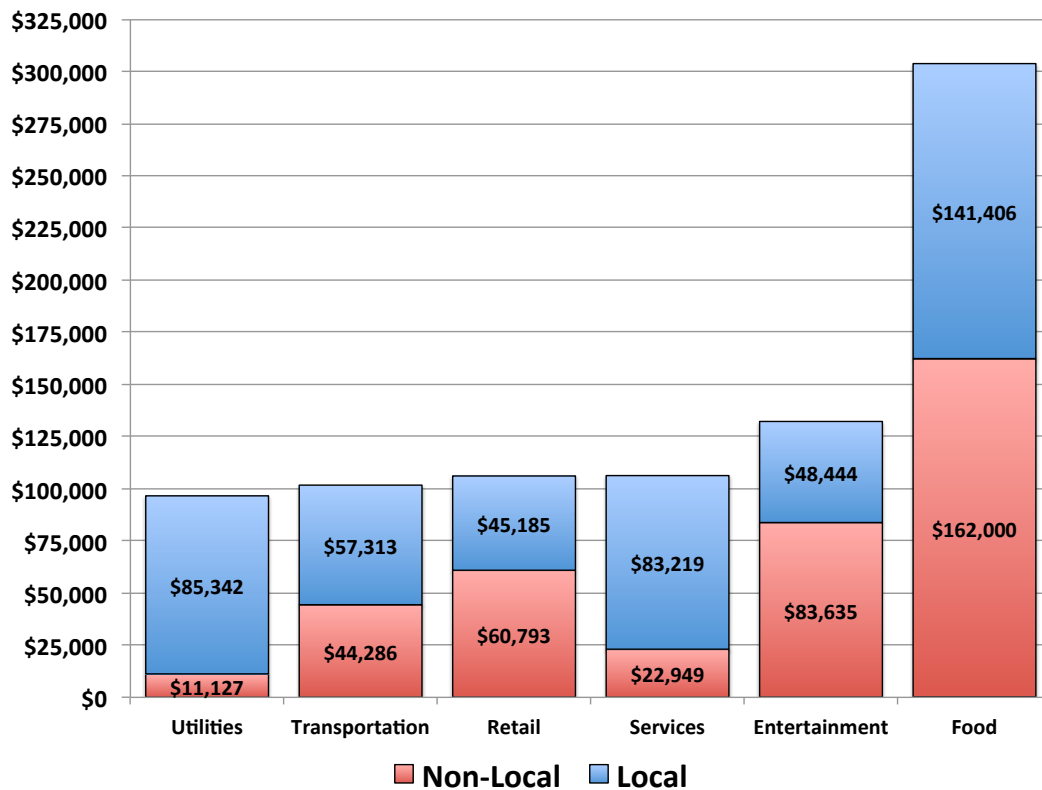
Camp entertainment expenditures averaged \$48,444 locally and \$83,635 non-locally. Some camps spent as much \$250,000 locally on entertainment.

Retail expenditures averaged \$45,185 locally and \$60,793 non-locally. Some camps spent as much as \$100,000 on retail goods and services locally.

Local transportation expenditures averaged an estimated \$57,313 with an estimated average of \$44,286 spent on non-local transportation.

The utilities category includes phone, electric and related costs. Local utility expenditures averaged \$85,342, while non-local utility costs averaged \$11,127.

Typical Camp Operating Expenditures (Non-Payroll)



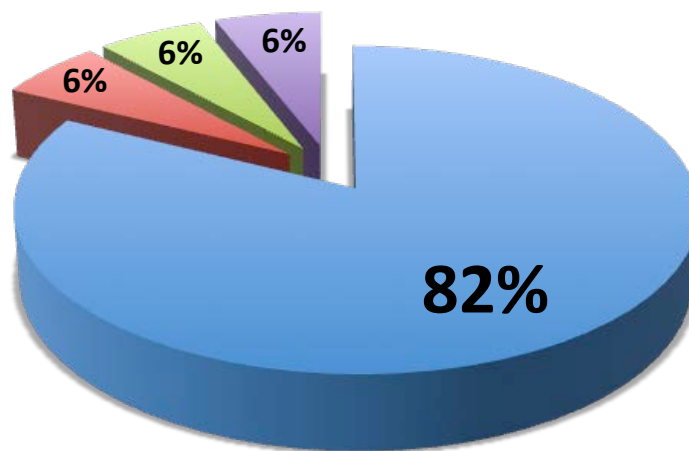
Pocono camping organizations also use and support a number of valuable community services. Camp owners were asked to identify the types of medical facilities and personnel available to

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their camps. Some 83% of camp representatives answering indicated they had a doctor present and some form of health clinic, infirmary or wellness center on-site. Some camps have as many as 10 medical professionals (doctors, nurses and medical assistants on staff).

The Wayne Memorial Hospital in Honesdale was the emergency health services provider for 82% of the camping organizations surveyed, while other camps relied upon facilities in Stroudsburg (Pocono Regional Hospital), Susquehanna County (Endless Mountains Health System) and Binghamton (Wilson Memorial Hospital).

Hospital Facilities Utilized



■ Wayne Memorial ■ Pocono Medical ■ Endless Mountains ■ Wilson Hospital

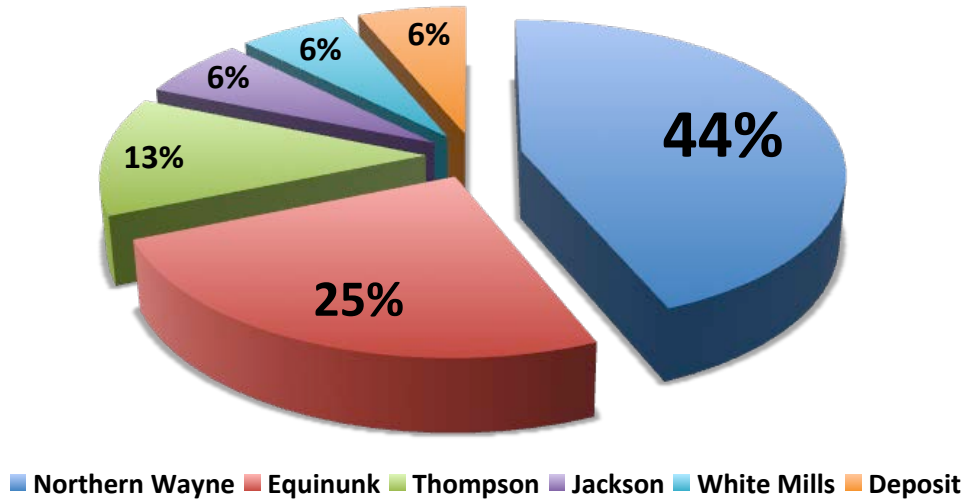
Camps were asked how often they used local police or fire protection services. Some 53% of camps indicated they used fire or police services, with 18% relying upon these services two or more times.



All respondents to these questions indicated that services had been efficiently provided. The Northern Wayne Fire Company was used by 44% of camps, while the Equinunk Fire Company served another 25%. Others used services from Thompson, Deposit (NY), White Mills and Jackson Township (Monroe County).

The Economic Impact of the Pocono Summer Camp Industry

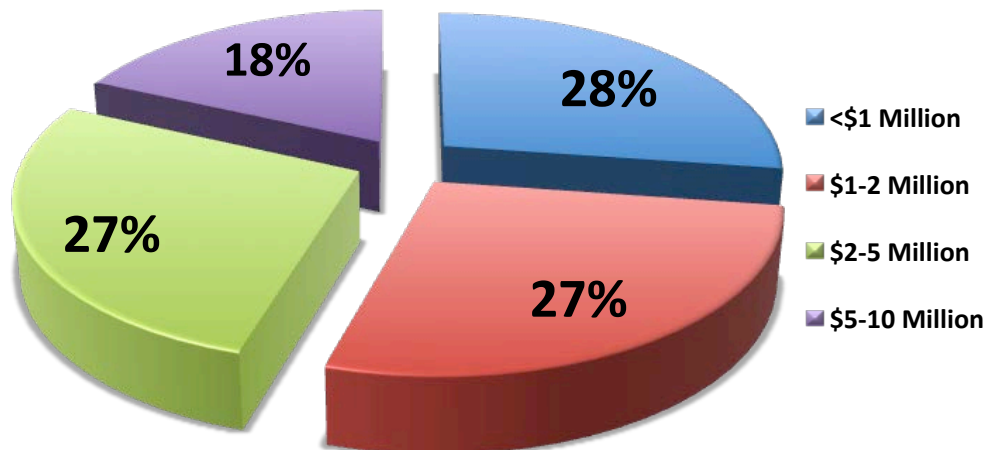
Fire Departments Utilized



Several questions were asked regarding the financial contributions of camps and their use of local financial institutions.

Some 76% of camp organizations indicated they had local bank accounts, with the largest having \$7.5 million in local bank deposits in 2015, and the average amount being \$3,260,000 per camp.

Camp Deposits in Local Banks

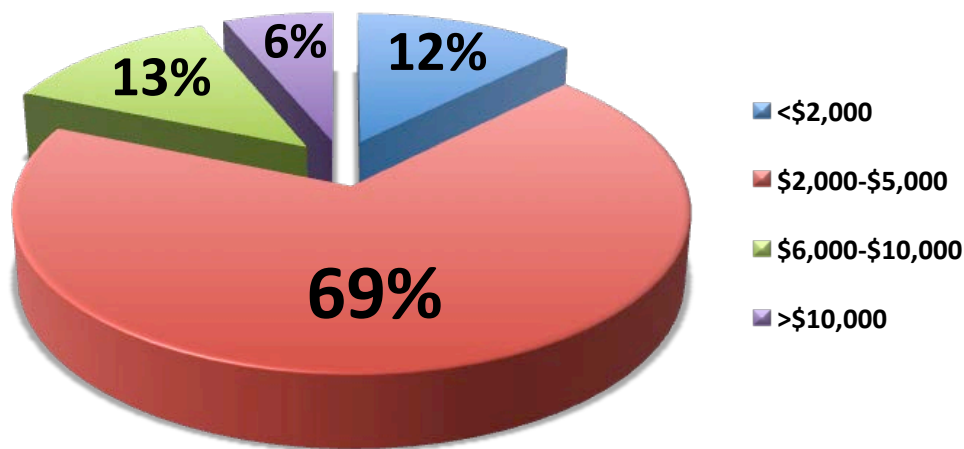


The Economic Impact of the Pocono Summer Camp Industry

Some 47% of camps indicated they also had mortgage accounts in a local banks with the largest being \$4 million, and the average mortgage account being \$1,785,000 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 \$5,100 per camp.

2015 Charity Contributions by Camps



Large amounts of taxes were paid by reporting camps for the year 2015. Pennsylvania Sales Tax payments amounted to an average of \$17,036 per camp for the 79% who incurred sales tax obligations. This suggests Pocono region camps paid as much as \$800,000 in state sales taxes.

Local taxes paid to school districts, counties and municipalities averaged \$101,306 per camp (\$66,233 to schools, \$23,073 to counties and \$12,000 to municipalities). This makes the camps extraordinarily large and important parts of the tax base for all localities where they are situated. One camp, in fact, paid approximately \$200,000 in property taxes. Extrapolating, it is estimated Pocono region camps pay as much as \$6 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 for 2016 indicates the County has 33 summer camps on its tax rolls, with a combined land area of 10,881 acres and an assessed value of \$119,847,700.

This translates into a market value of \$134,229,424. It does not necessarily include all taxable camp properties because some surrounding open space lands may be classified and assessed

The Economic Impact of the Pocono Summer Camp Industry

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	Market Value	Tax Rate	Total Taxes Paid	Municipal Taxes Paid	Camp % of Municipal Taxes Paid
Berlin	1,106	\$17,156,700	\$19,215,504	2.14%	\$367,999	\$23,590	10%
Buckingham	1,712	\$17,855,600	\$19,998,272	2.15%	\$384,151	\$25,712	25%
Canaan	580	\$1,471,400	\$1,647,968	2.09%	\$30,771	\$736	2%
Cherry Ridge	28	\$13,600	\$15,232	2.07%	\$281	\$8	0%
Clinton	200	\$1,416,900	\$1,586,928	2.06%	\$29,216	\$992	1%
Damascus	610	\$4,929,600	\$5,521,152	2.26%	\$111,529	\$12,570	2%
Dyberry	277	\$3,517,100	\$3,939,152	2.07%	\$72,714	\$2,110	3%
Lebanon	554	\$10,351,300	\$11,593,456	2.09%	\$216,076	\$8,281	12%
Manchester	605	\$12,302,400	\$13,778,688	2.34%	\$288,366	\$41,404	14%
Oregon	96	\$5,699,800	\$6,383,776	2.12%	\$120,689	\$6,270	8%
Paupack	611	\$1,158,900	\$1,297,968	1.89%	\$21,895	\$1,001	0%
Preston	3,547	\$36,232,400	\$40,580,288	2.16%	\$781,689	\$54,349	19%
Scott	290	\$5,367,600	\$6,011,712	2.18%	\$116,822	\$9,071	14%
Sterling	164	\$472,500	\$529,200	2.14%	\$10,105	\$1,753	2%
Waymart	501	\$1,901,900	\$2,130,128	2.31%	\$43,976	\$5,154	3%
Totals	10,881	\$119,847,700	\$134,229,424	N/A	\$2,596,279	\$193,001	7%

Fifteen of Wayne County's municipalities include summer camps. These camps pay a combined total of \$2,596,279 in real estate property taxes at 2016 tax rates.

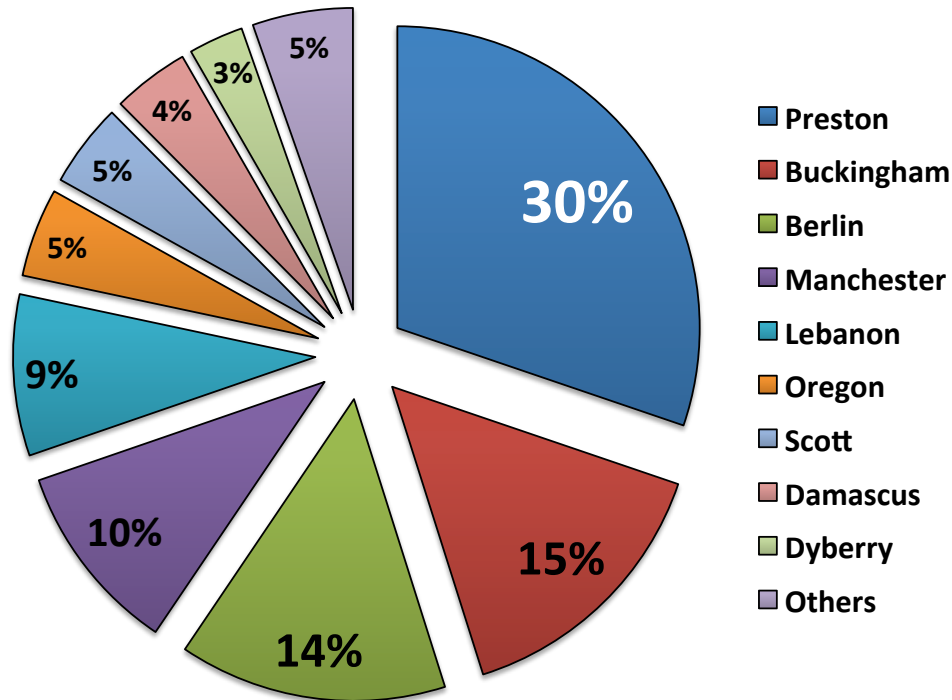
Tax revenues generated by camps range from a low of \$281 in Cherry Ridge Township to a high of \$781,689 in Preston Township. Summer camps pay over \$100,000 in taxes in eight different municipalities.

Summer camps pay 25% of the taxes in Buckingham Township, the largest single assessment category for that municipality. They also pay 19% of taxes in Preston Township, 14% in Manchester and Scott Townships, 12% in Lebanon Township, 10% in Berlin Township and 8% in Oregon Township, all Northern Wayne County communities.

Countywide, children's camps pay fully 2.3% of all real estate property taxes (up from 2.0% in 2002), an impressive statistic given the industry is generally confined to a relatively few communities.

The Economic Impact of the Pocono Summer Camp Industry

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.

Indeed, among all individual assessment classifications, only residential uses and general agriculture have paid more local property taxes.

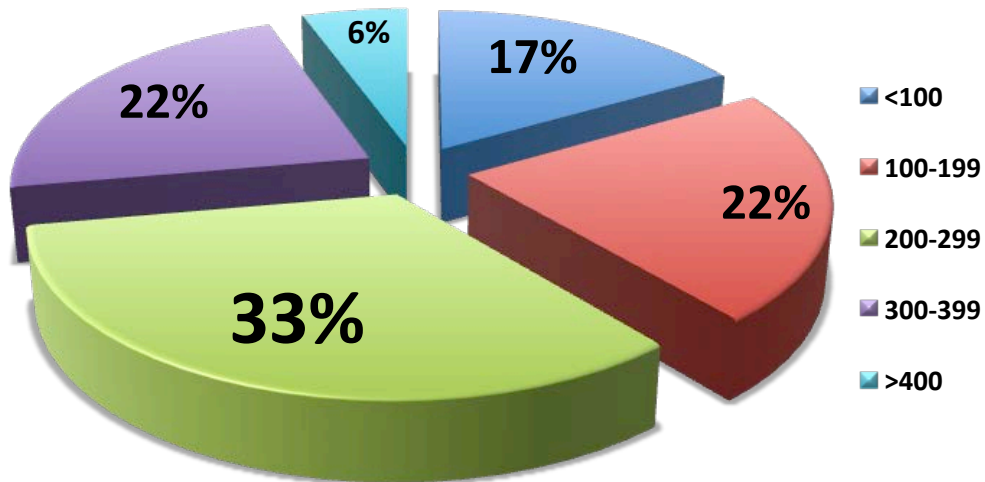
Camps were also asked to indicate numbers of employees on-site throughout different parts of the year. Reporting camps indicated they used an average of 9.8 full-time and 228.3 part-time employees annually at their local facilities.

This equates to a total of over 14,000 employees at Pocono area summer camps, some 585 of which are estimated to be full-time, and 13,700 of which are estimated to be part-time. The largest part-time employer among the camps surveyed used 700 such employees.

Some 8.0% of all employees were reported to be local residents, an average of 19.0 jobs per camp.

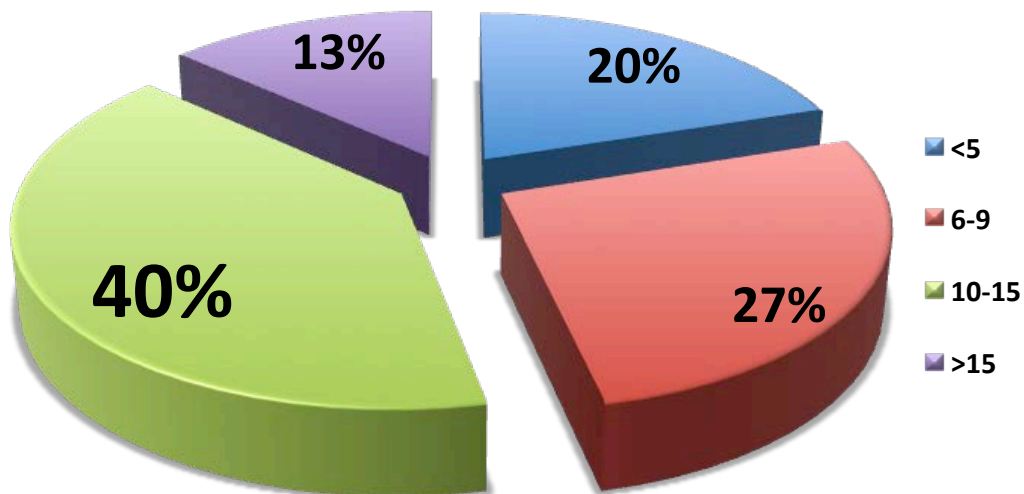
The Economic Impact of the Pocono Summer Camp Industry

Part-Time Camp Employees - 2015



These are very significant job numbers and, of course, are actually even higher in light of the fact that not every camp responded. 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 many foreign countries. They spend much of their income in the area while residing locally.

Full-Time Camp Employees - 2015



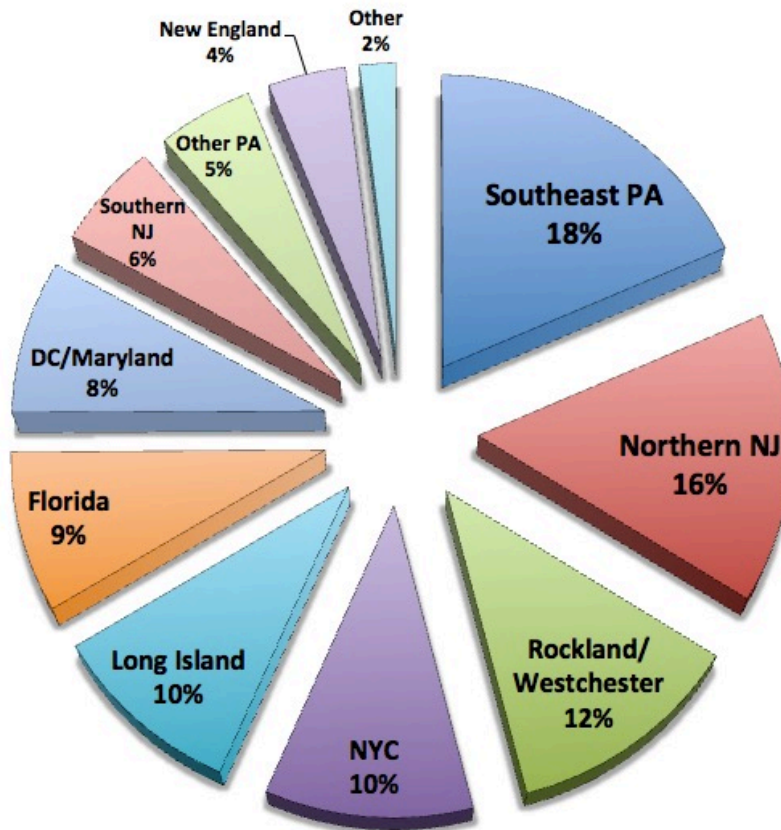
The Economic Impact of the Pocono Summer Camp Industry

Parents and employees were also surveyed to further gauge the direct impacts of camp employment and visitation.

The results demonstrate that camps contribute to the overall quality of life within the region while introducing new people to the region.

Parents of campers come from throughout the country as the following self-explanatory chart illustrates. Southeast Pennsylvania, Northern New Jersey and New York zip codes are predominant among parents responding to the survey.

Home Zip Code of Parents

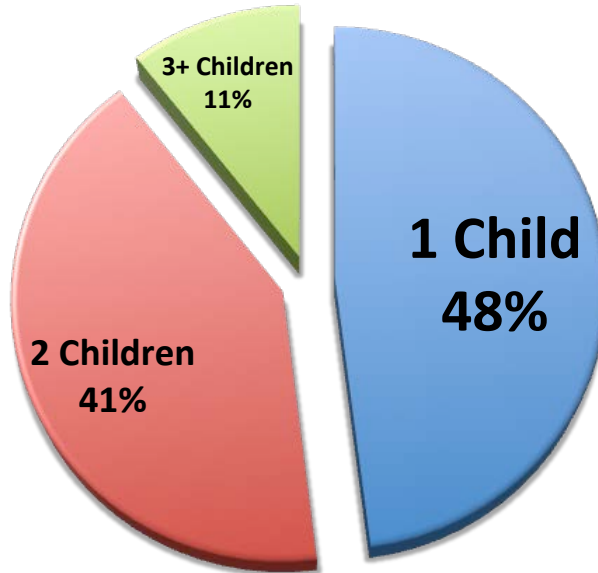


Parents were also asked to identify how many children they sent to summer camps in the Poconos.

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.

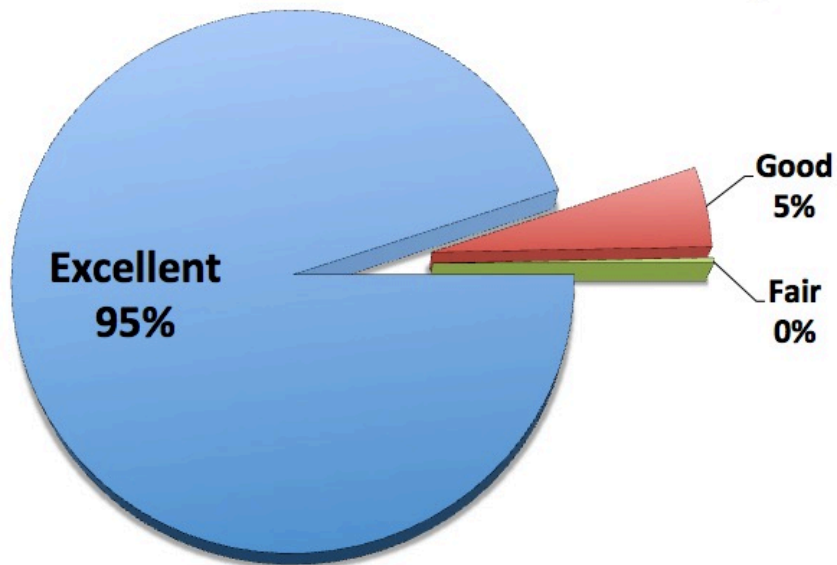
The Economic Impact of the Pocono Summer Camp Industry

No. of Children at Camp



Some 95% 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.

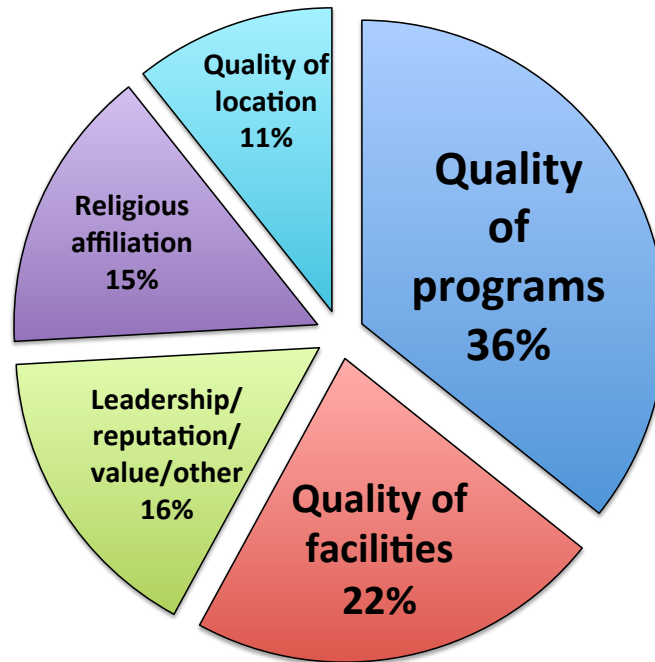
Overall Satisfaction With Camp



The Economic Impact of the Pocono Summer Camp Industry

Parents expressed a variety of reasons for choosing summer camps for their children, with quality of the programs offered topping the list at 36%. Quality of the facilities (22%), the camp leadership and reputation (16%) and religious affiliation (15%) were also important.

Reasons for Choosing Camp

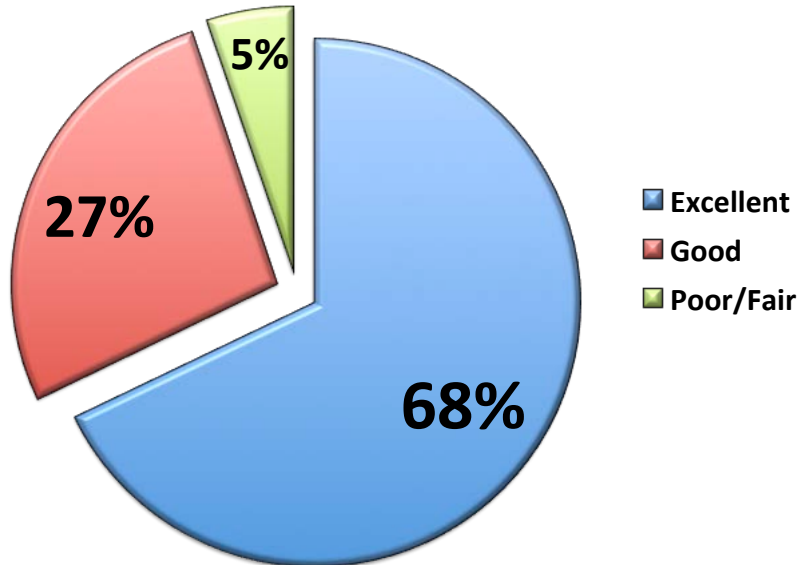


Although only 11% cited the quality of the camp location as a key factor in choosing it for their children, 68% rated their overall level of satisfaction with the location of the camp as excellent and 27% rated the area as good. Others thought the location was fair (5%) or poor (0.3%).



The Economic Impact of the Pocono Summer Camp Industry

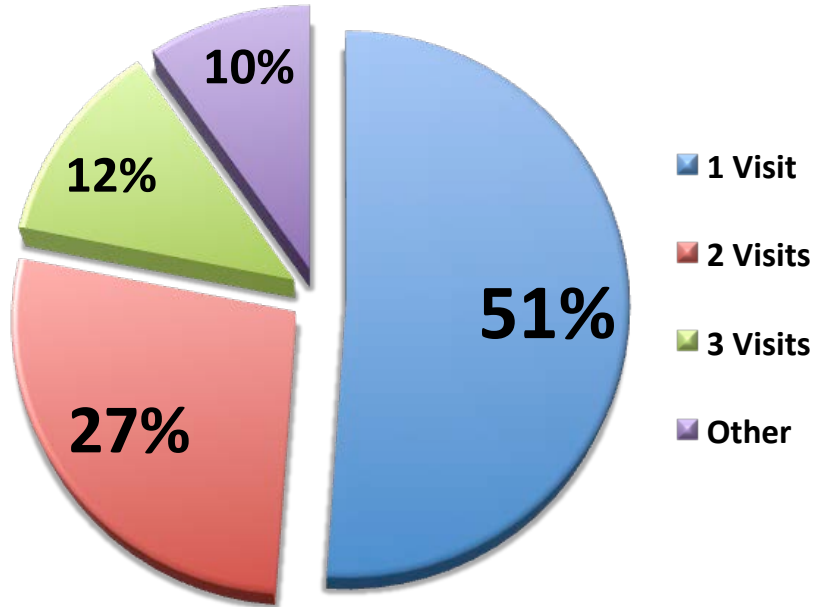
Satisfaction with Camp Area



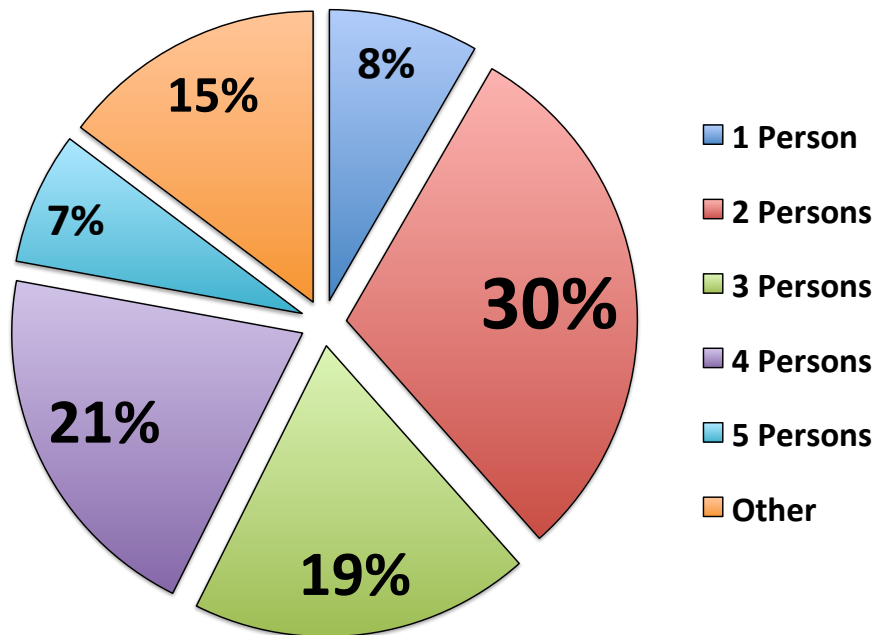
Some 51% of parents visited camp at least once in 2015, but many visited multiple times. Some 1.78 persons visited, on average, and stayed 2.8 days and 1.9 nights. Most (55%) stayed at a hotel, motel or bed and breakfast, although 16% stayed at the camp or with friends (4%). Some 11% stayed within 50 miles.



No. of Camp Visits by Parents

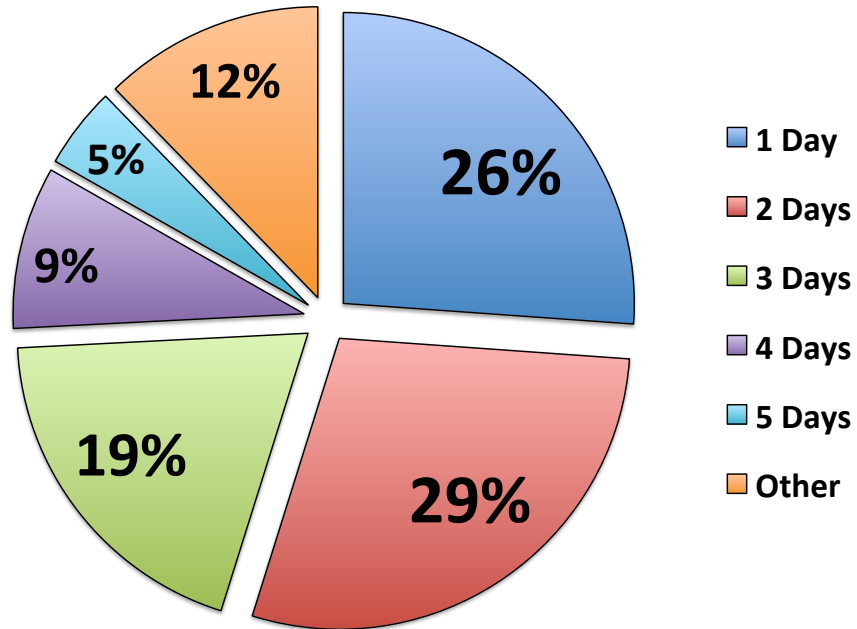


No. of Family Members Visiting

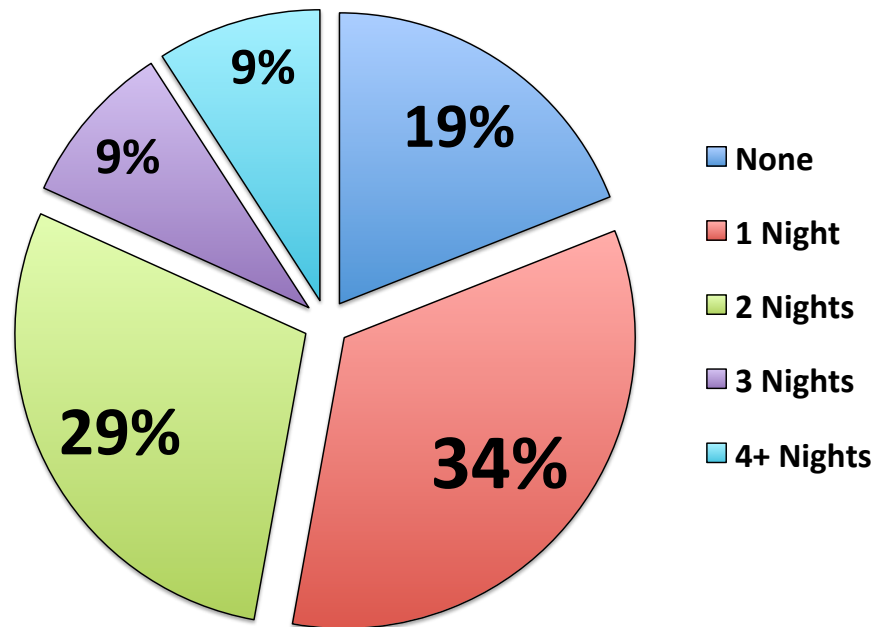


The Economic Impact of the Pocono Summer Camp Industry

No. of Days Spent Visiting



No. of Nights Stayed



The Economic Impact of the Pocono Summer Camp Industry

Revealingly, 70.4% of parents were former summer campers themselves and 52.5% 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 46.0% said visiting the camp made them want to visit the area for other reasons, 10.5% stated the experience made them want to move to or have a second home in the area and 15.7% 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:

Pocono Camp Parent Expenditures Per Season			
Expense Category	Average Amount	Local Share	Total Local Impact
Food	\$86.69	\$60.43	\$3,909,924
Lodging	\$168.49	\$151.16	\$9,780,789
Transportation	\$45.74	\$30.27	\$1,958,657
Entertainment	\$28.30	\$23.51	\$1,521,476
Retail	\$51.02	\$36.85	\$2,384,034
Other	\$24.74	\$16.92	\$1,094,540
Totals	\$404.98	\$319.14	\$20,649,419

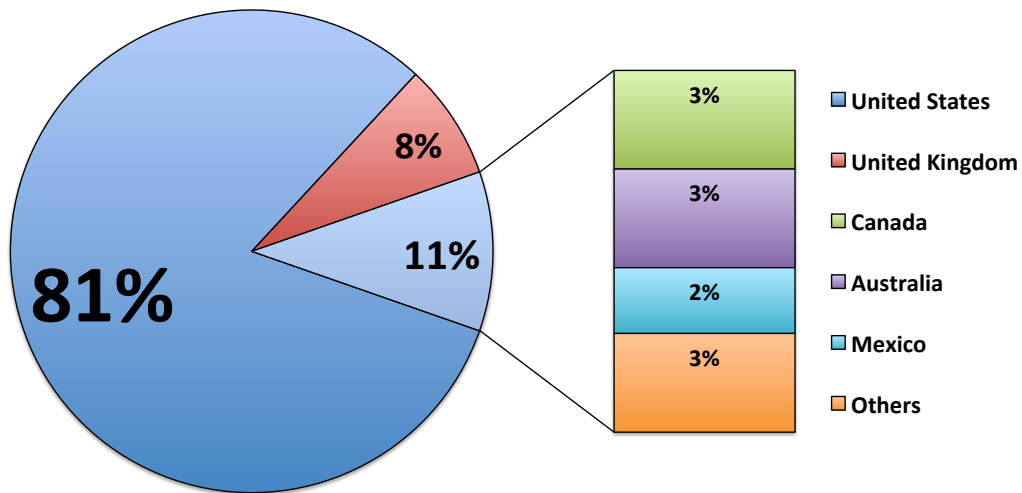
The typical camper parents spent \$405 per day locally when visiting children at local summer camps. This represents a direct impact on the regional economy of \$20,650,000 in tourism expenditures (assuming 37,800 campers and using the average of 2.8 days spent at camp per family).



The Economic Impact of the Pocono Summer Camp Industry

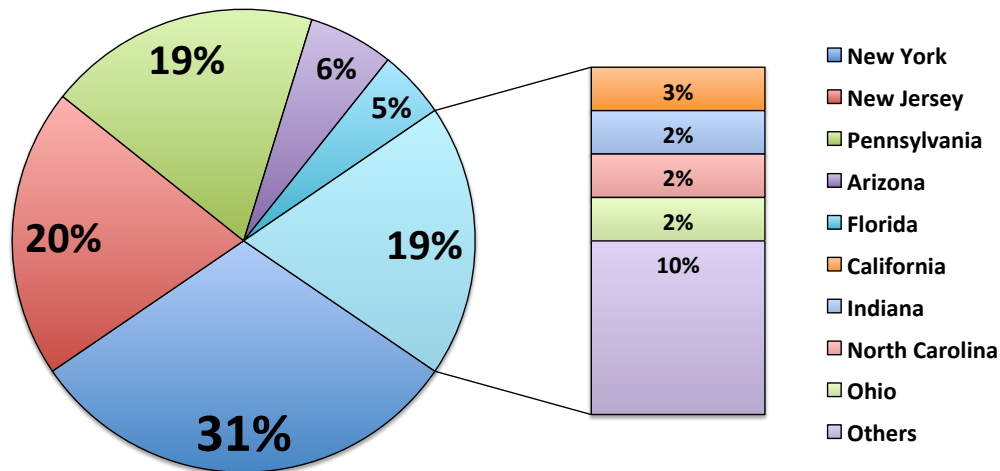
Employees were also asked to help identify the direct impacts of camps on the local economy. Most come from the United States (81%) but significant numbers from the United Kingdom, Canada and elsewhere.

Origins of Camp Employees by Nation



Some 31% of camp employees from the U.S. came from from New York State, 20% came from New Jersey, 19% came from Pennsylvania and others came from across the country, including Arizona, Florida, California and elsewhere.

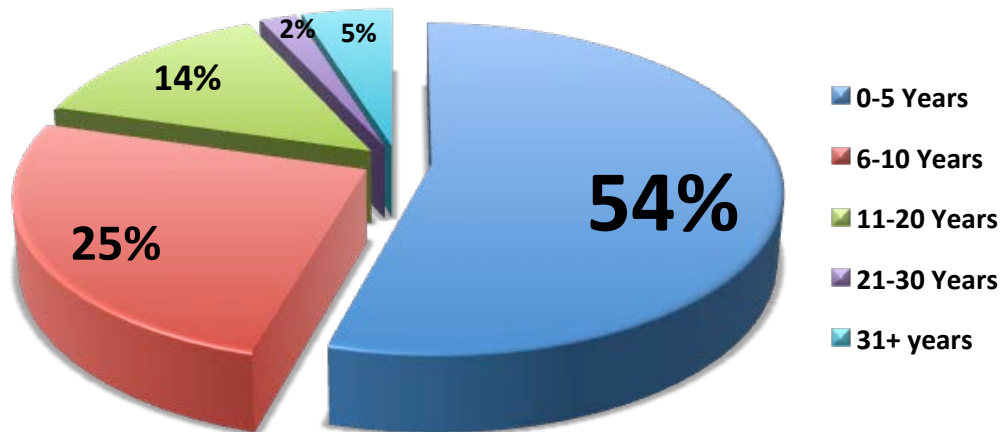
Origins of US Camp Employees by State



The Economic Impact of the Pocono Summer Camp Industry

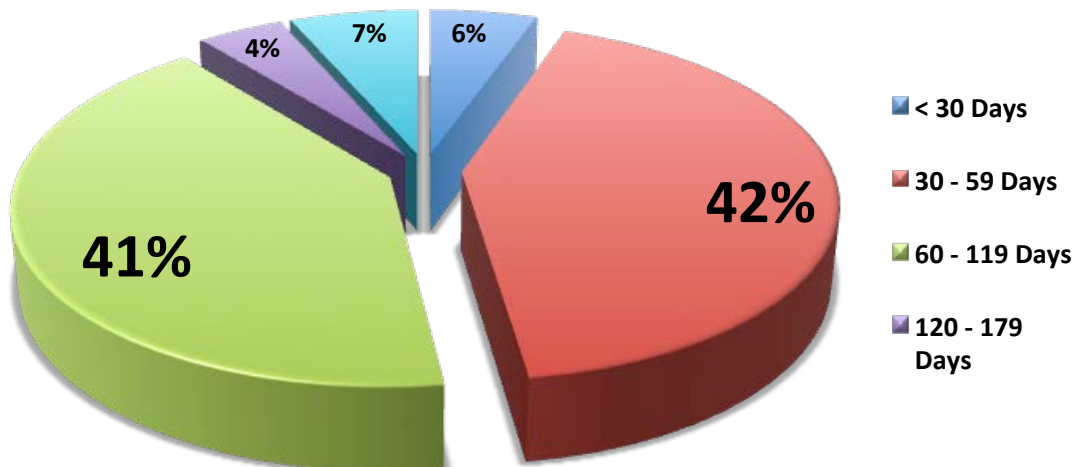
The number of years employees have worked at their camps indicates a large number of return workers and high level of job satisfaction. Some 46% of employees indicated they had worked more than five years at camp with the average being 7.6 years.

Years Worked at Camp



Some 58% of camp employees worked 60 or more days at camp, with the average employee working a total of 71.9 days at camp.

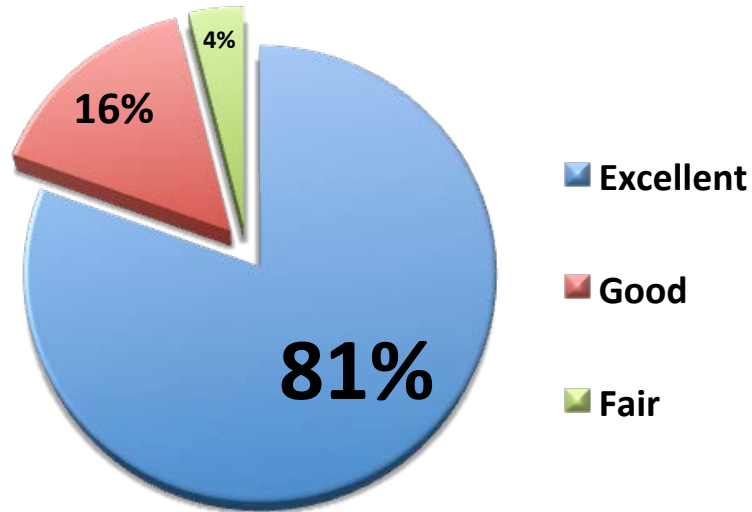
Days Worked at Camp - 2015



The Economic Impact of the Pocono Summer Camp Industry

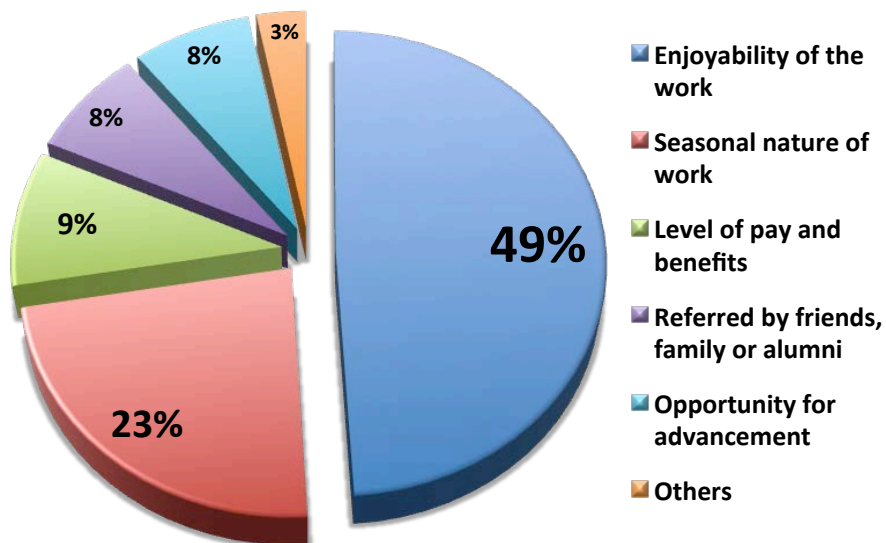
A large majority of camp employees (81%) rated the level of satisfaction with their job at the camp as being excellent and 16% described their experience as good.

Camp Employee Job Satisfaction



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.

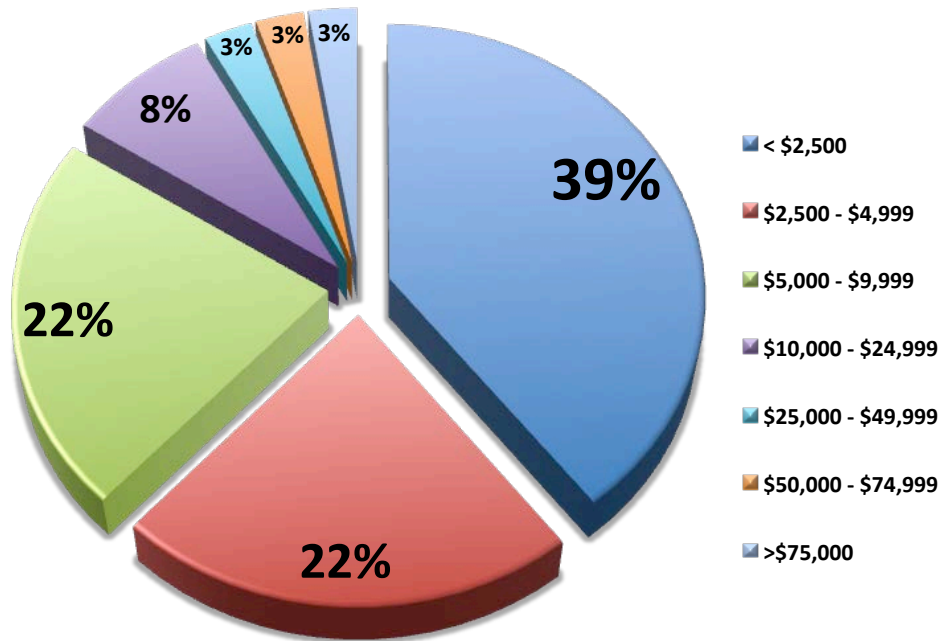
Reasons for Choosing Camp Employment



The Economic Impact of the Pocono Summer Camp Industry

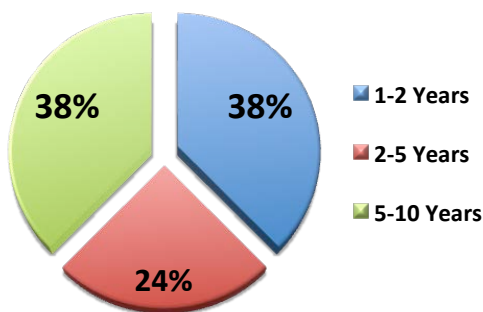
Salaries and wages of camp workers varied widely because of the combination of part-time, seasonal and full-time workers used. The following chart provides an overview. The average camp employee salary was \$9,139.

Camp Salaries and Wages

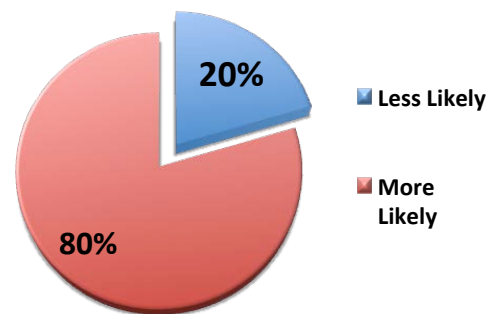


A large majority of employees (92%) said that working at the camp had made them more likely to stay in the area and 62% stated they expected to work at the camp for two or more additional years. Fully 38% expected to be working at camp five or additional years. Some 19% felt the value of the camp was not fully appreciated by the community but only 12% believed the community was not fully appreciated by the camp, indicating a growing recognition of the value of the summer camp industry to the community and vice-versa

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



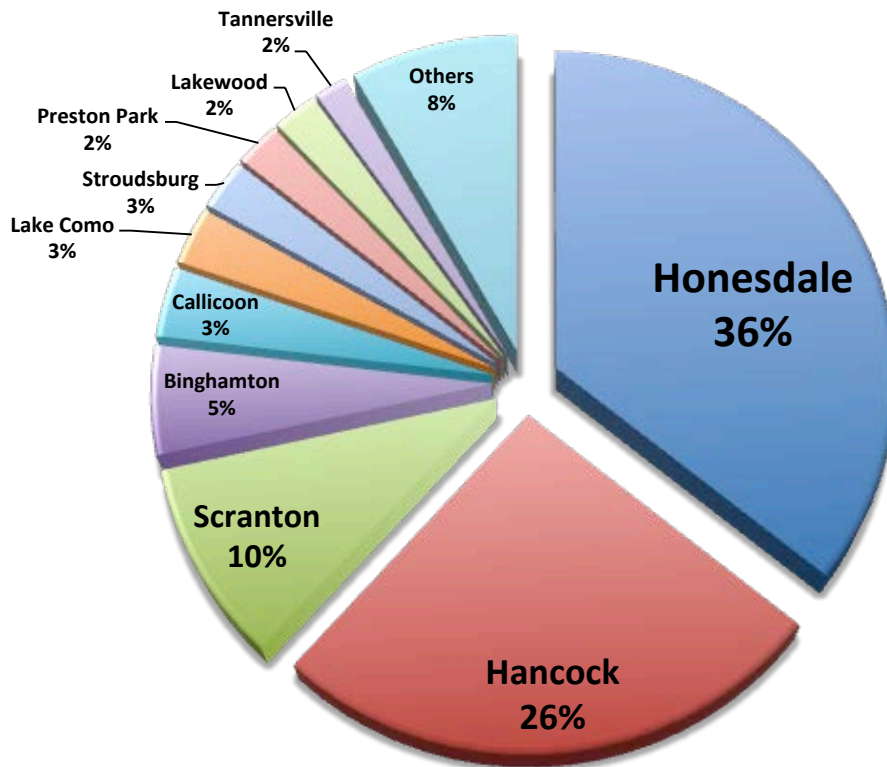
Has working at this camp made you more or less likely to stay in this area?



The Economic Impact of the Pocono Summer Camp Industry

All employees surveyed made purchases for their camps. Shopping locations were rated by 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 are a sampling of responses:

- Camp always makes an effort to buy local
- Camp offers a community camp for local people every year
- Campers volunteer at local places
- Directors/owners are active in many local civic activities
- Staff goes to town to eat in the restaurants, go to movies and shop
- Camp patronage supports many restaurants in the area
- Camp recycles, composts donates food to needy
- Camp hires as many local staff as possible and donates to local charities

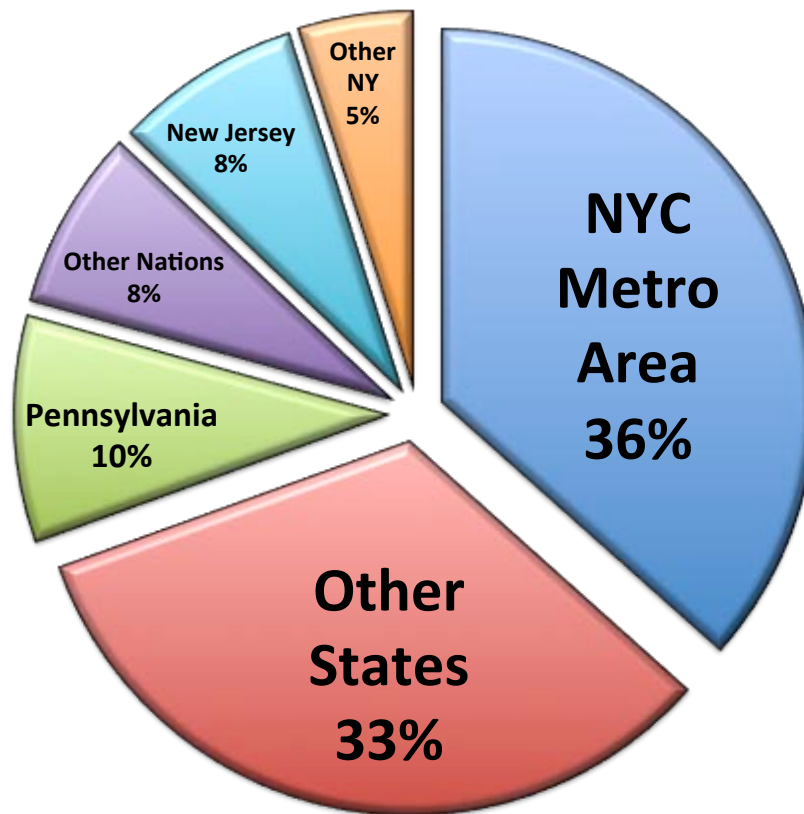
The Economic Impact of the Pocono Summer Camp Industry

- Camp helps maintain the area's natural beauty
- Camp is significant contributor to local tax base, with minimal services taken.
- Camp supports local contractors, artisans, banks, etc.
- Camp helps promote tourism to the area
- Camp brings staff from all over the world to area, enriching with international culture
- Camp caters to locals looking for venues to host events and weddings

These insights reflect the positive experiences of employees as well as the parents. They demonstrate the camp industry is not only alive and well, but making substantial contributions to the area. It also has a tremendous growth potential for the future.

Camp alumni were also surveyed to gather their perspectives on these matters. Those alumni are largely located in the New York metropolitan area (36%) but Pennsylvania is growing in importance (10%) as a market.

Where Camp Alumni Reside

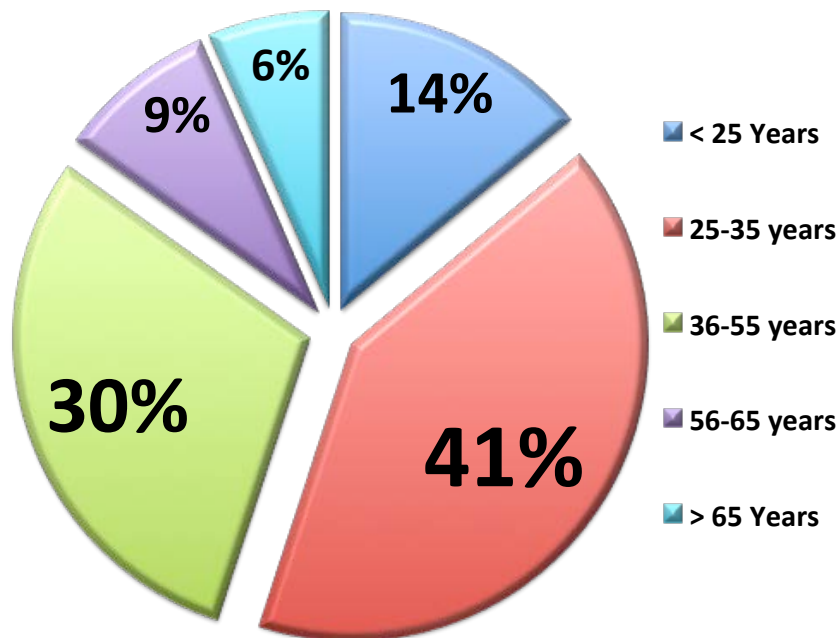


The Economic Impact of the Pocono Summer Camp Industry

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:



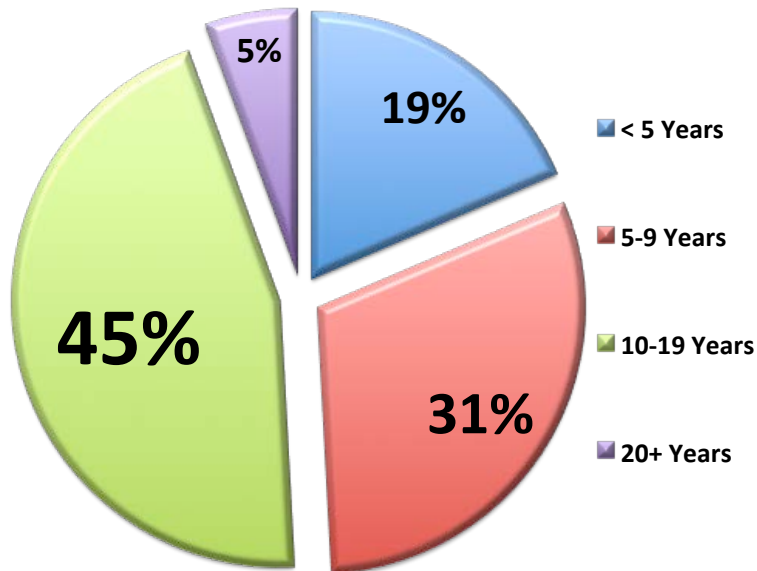
Age Breakdown of Alumni



The Economic Impact of the Pocono Summer Camp Industry

Fully half of summer camp alumni have 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.

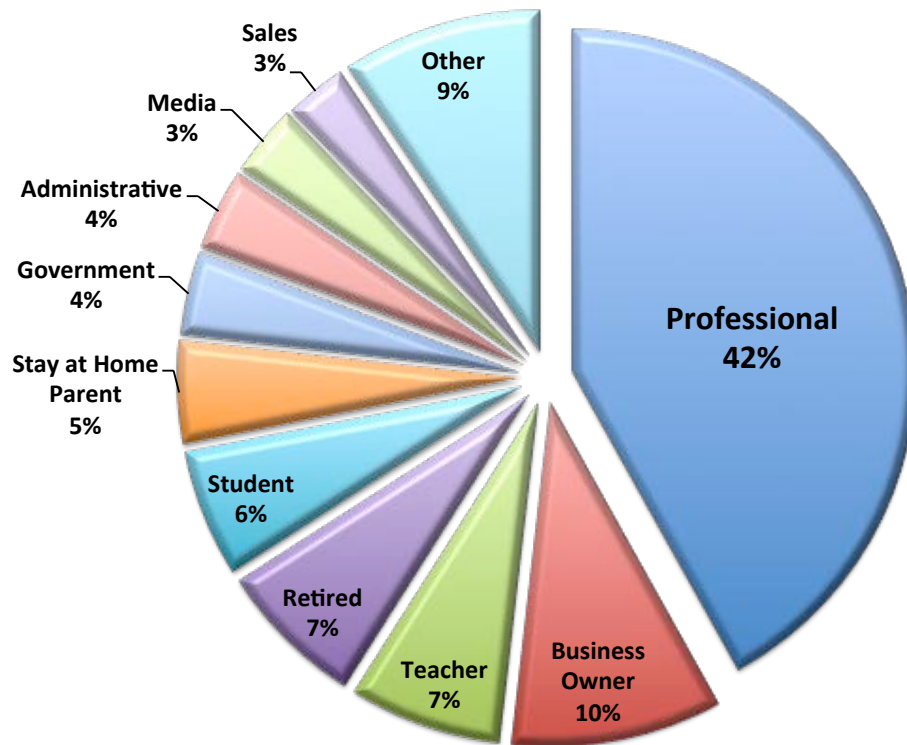
Years Spent at Summer Camp



The Economic Impact of the Pocono Summer Camp Industry

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 (42%), business owners (10%), teachers (7%) and members of wide-ranging industries, as the following chart illustrates.

Summer Camp Alumni Occupations

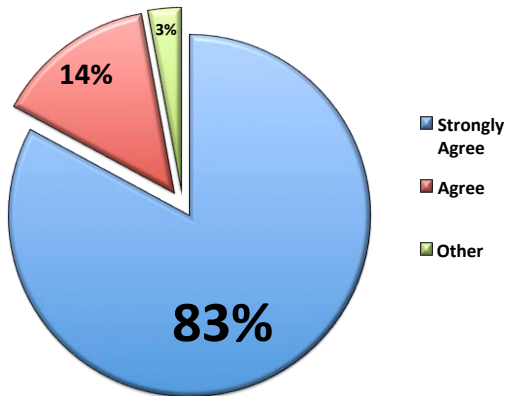


Alumni were also queried about their summer camp experience and offered the following:

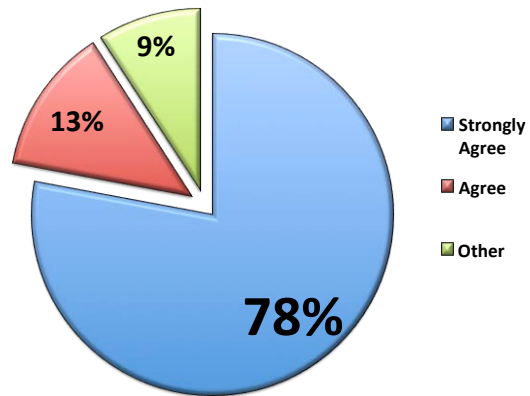
- Camp was a defining moment in my life (83%)
- It led me to send my own children to camp to experience the same things (78%)
- Investments/improvements made to improve the experience are impressive (70%)
- Camp gave me a better appreciation of the outdoors and rural life (66%)
- Camping made me want to come back to the region to visit in later life (64%)
- Camping led me to become a counselor/employee at the camp in later life (60%)
- Camp introduced me to businesses, communities and attractions I revisited later (39%)
- I continue to spend as much time as possible visiting the camp I attended (33%)
- My summer camp experience made me want to invest in the region (20%)
- Summer camping made me want to secure a 2nd-home in the region (10%)

The Economic Impact of the Pocono Summer Camp Industry

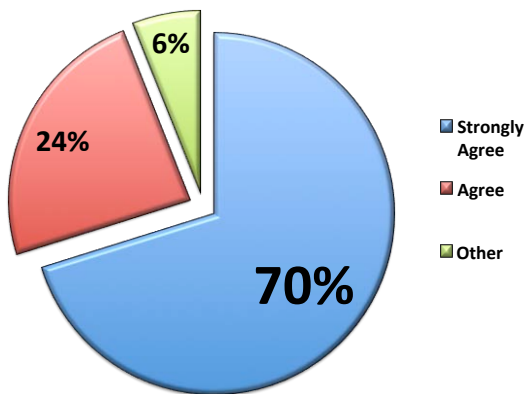
My summer camp experience was a defining moment in my life



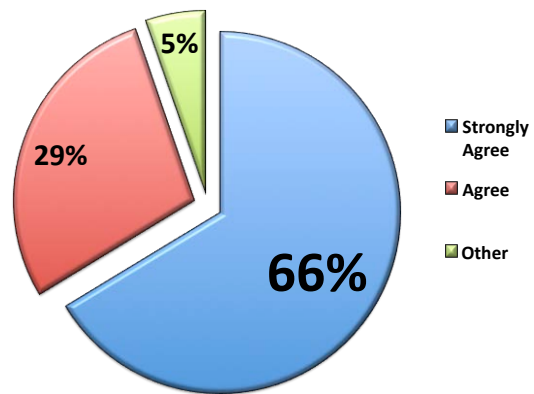
My summer camp experience led to me wanting to send my own children to camp



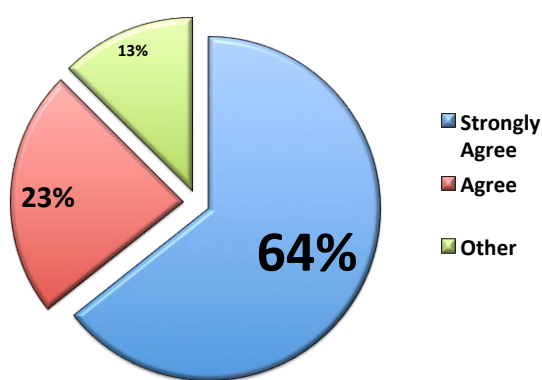
I am impressed with the investments and improvements made at my camp



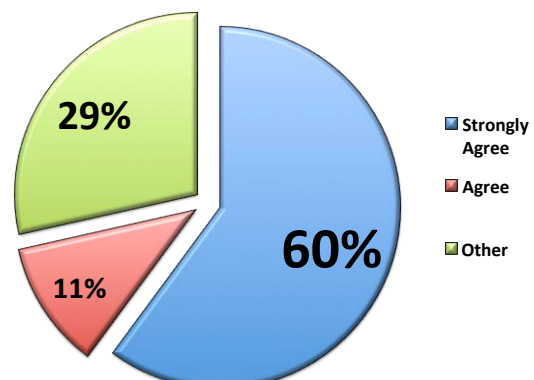
My summer camp experience gave me a better appreciation of the outdoors and rural life



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

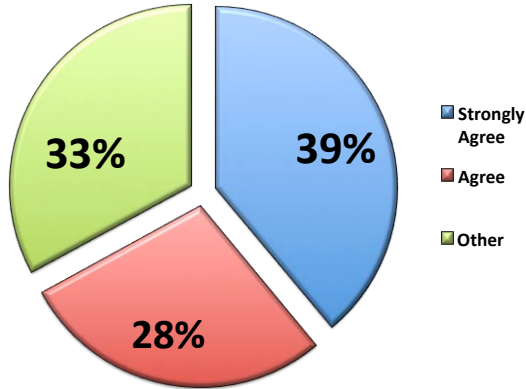


My summer camp experience led to become a counselor/employee at the camp in later life

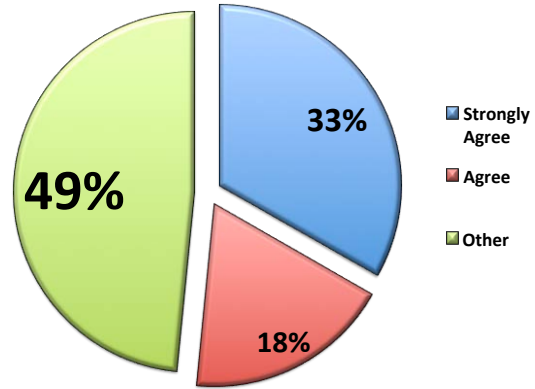


The Economic Impact of the Pocono Summer Camp Industry

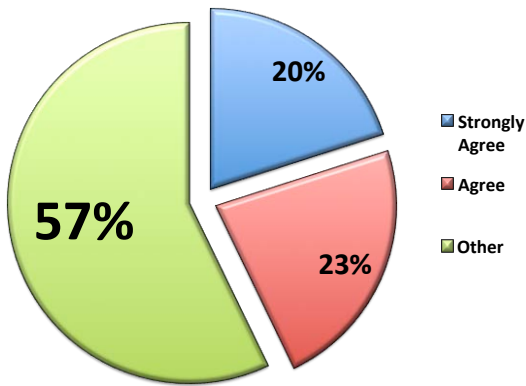
Visiting camp introduced me to businesses, communities and attractions I revisited later



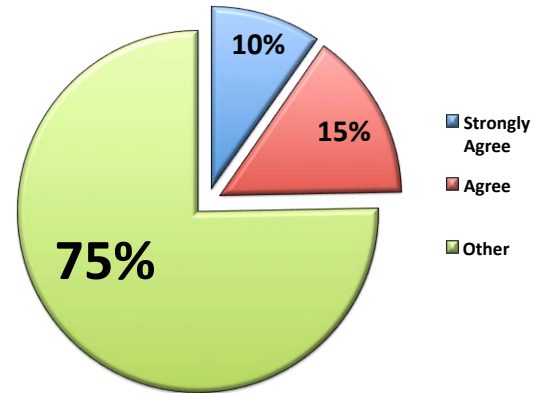
I continue to spend as much time as possible visiting the summer camp I attended



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

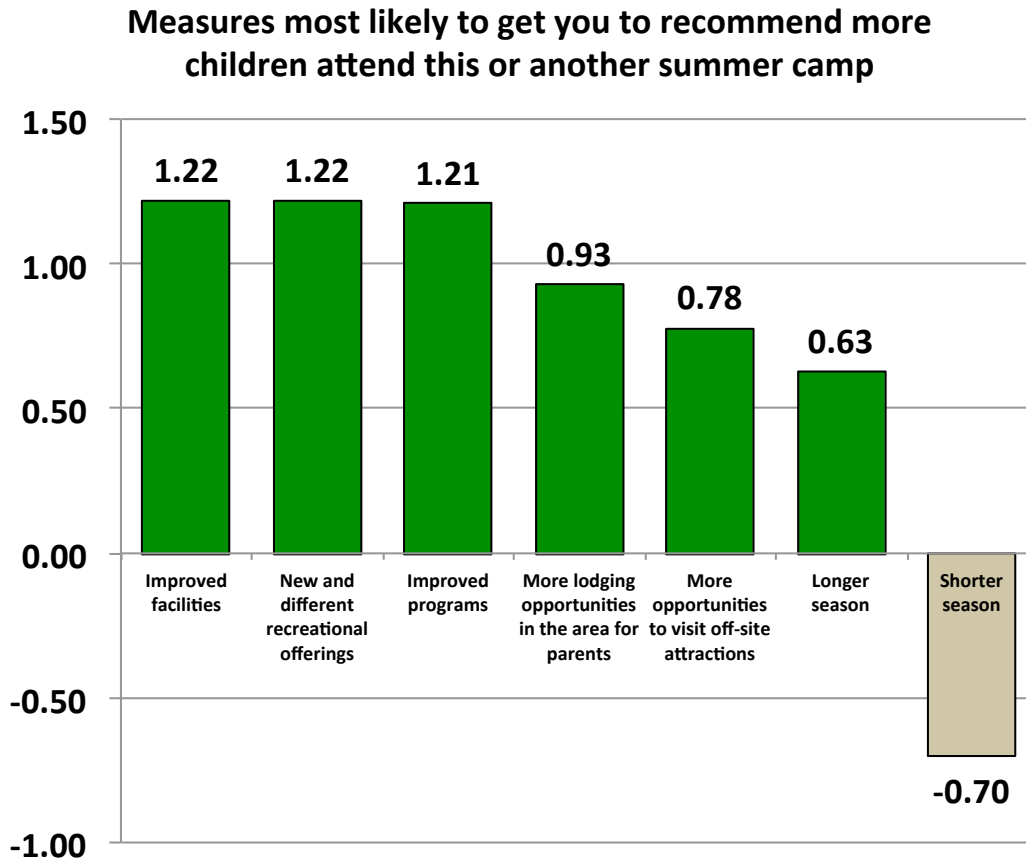


My summer camp experience made me want to purchase/rent a second-home in the region



The Economic Impact of the Pocono Summer Camp Industry

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 net ratings for each answer:



The answers suggest 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 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 \$215 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 42% of all operating expenses or \$1.5 million per camp in 2015.

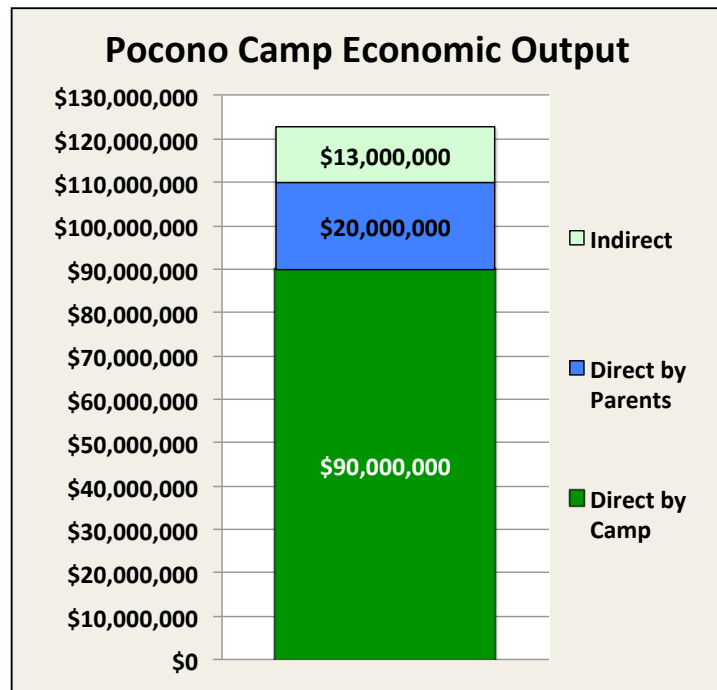
Extrapolated to the 60 regional camps, this represents an estimated \$90 million of direct impact from mainstay summer camping activities. Parent tourism expenditures (estimated at \$20 million must be added to this for a total of approximately \$110 million in direct contributions to the Pocono economy.

These figures, however, do not measure the full economic impact of camping on the local economy, because 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.

The U.S. Bureau of Economic Analysis (BEA) estimate this effect using regional input-output analysis. An analysis was requested on Wayne County to illustrate. It indicates summer camps, which are included in NAICS Code 721214 "Recreational and Vacation Camps (except Campgrounds)" as one of several "Accommodation and Food Services" categories, enjoy a total output multiplier of 1.12 and an employment multiplier of 8.72.

A dollar of sales, therefore, generates \$1.12 of total output after circulating through the economy. The \$110 million of direct camp impacts actually produces \$123 million of total output for the regional economy.



The Economic Impact of the Pocono Summer Camp Industry

Pocono summer camping and the activities that surround it constitute a major industry by any standard.

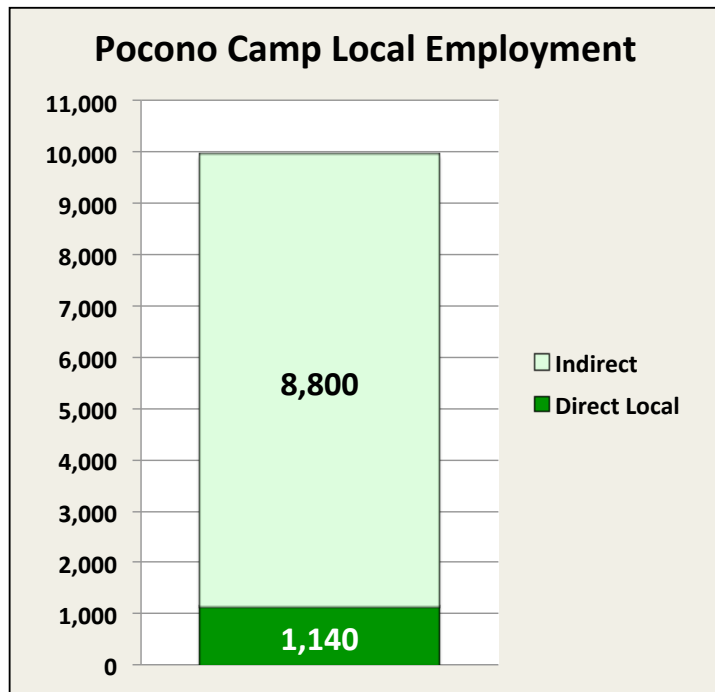
Likewise, Pocono camps employed an estimated 14,285 persons (585 full-time and 13,700 part-time) in 2015, about 8% or 1,140 of whom were hired locally. Applying the 8.72 employment multiplier indicates the summer camping industry created another 8,800 indirect jobs for a total of 9,940 direct and indirect Pocono jobs, not to mention the economic contributions of seasonal workers from outside the region.

Recent 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 second 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 2015 location quotient of 1.47. This means there was 1.47 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 11.7% of the total, after health care and social assistance (19.1%), retail trade (16.0%) and public administration (12.2%). Moreover, the accommodation and food services industry paid average wages (part-time as well as full-time) of \$20,184, which was \$2,905 or 16.8% above the state average.

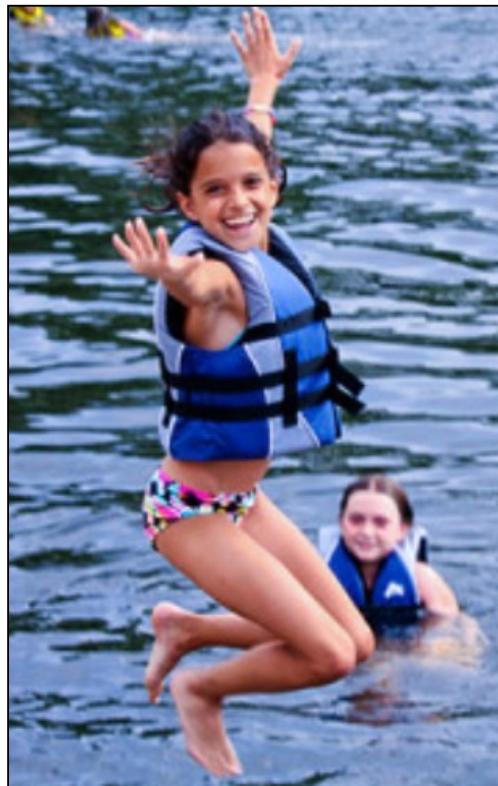


The Economic Impact of the Pocono Summer Camp Industry

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 Wayne County Camp Alliance news release. Presentations should be scheduled with local officials. A copy should also be made available through the Wayne County Camp Alliance's website.
- 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. Continued sharing of facilities (where camps make their facilities available for local use and vice-versa) is appropriate, for example. 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. The Wayne Economic Development Corporation (WEDCO), the Chamber of Commerce 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 - Wayne County Camp Alliance Membership

2 - Camp, Employee and Parent Survey Forms

APPENDIX 1

Wayne County Camp Alliance Membership

Wayne County Camp Alliance Members - 2016

**B'nai B'rith Perlman Camp
Camp Cayuga
Camp Chen-A-Wanda
Camp Lohikan
Camp Morasha
Camp Moshava
Camp Neshet/NJY Camps
Camp Poyntelle Lewis Village
Camp Ramah in the Poconos
Camp Seneca Lake
Camp Shoshanim
Camp Starlight
Camp Tioga
Camp Timber Tops
Camp Towanda
Camp Wayne for Boys
Camp Wayne for Girls
Camp Westmont
Chestnut Lake Camp
Camp Weequahic
Equinunk & Blue Ridge
Indian Head Camp
Island Lake Camp
Lake Bryn Mawr Camp
Lake Owego
Lavi
Pine Forest Camp
Summit Camp and Travel
Trail's End Camp
Tyler Hill Camp**

APPENDIX 2

Alumni, Camp, Employee and Parent Survey Forms