

# *Economic Impact Study*



**PLANNING  
DECISIONS**

Research & Planning

## An Economic Impact Study of Youth Camps in Maine

For: The Maine Youth Camping Association  
P.O. Box 1861  
Portland, Maine 04104

Funded by: The Children's Camp Alliance of Maine

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## TABLE OF CONTENTS

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I.	SUMMARY	1
II.	THE DIRECT IMPACT OF MYCA CAMPS IN MAINE	3
III.	THE TOTAL ECONOMIC IMPACT OF MYCA CAMPS	8
	APPENDIX 1: SURVEY INSTRUMENT	12
	APPENDIX 2: EXPLANATION & INTERPRETATION OF SURVEY RESULTS	14

## I. SUMMARY

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Maine's youth camping industry has been a mainstay of the state's rural economy for over a hundred years. In areas of the state that have suffered both from the loss of jobs in traditional farming and manufacturing industries and from the ever-widening spread of suburban sprawl, residential camping has remained a vibrant but largely invisible economic engine.

There are nearly 200 licensed youth camps in Maine.<sup>1</sup> These run the gamut from seasonal residential camps to trip or activity specific camps to limited activity day camps. They encompass for-profit businesses, religious based organizations and non-sectarian non-profit organizations. Approximately half of the camps belong to the Maine Youth Camping Association (MYCA), a 501 (c) (3) non-profit organization dedicated to promoting youth camping in Maine. Table 1 presents the estimated composition of the industry in 2004.

**Table 1**  
**Estimated Composition of the Maine Youth Camping Industry, 2004**

Membership	Residential	Day Camp	Total
MYCA	104	5	109
<u>non-MYCA</u>	<u>17</u>	<u>64</u>	<u>81</u>
Total	121	69	190

Source: MYCA and Maine Department of Health and Human Services

To estimate the industry's impact on the Maine economy, MYCA surveyed its members concerning their operational spending, their capital spending and the visitors they attract to Maine. Analysis of survey results indicates that **the total economic impact on Maine of MYCA activities is approximately \$245 million per year and that this economic activity supports approximately \$25 million in tax revenues for Maine's state and local governments.**

Clearly, the impact of the state's *entire* youth camping industry is even greater. How much greater cannot be known without a survey of non-MYCA camps. What is clear, however, is that--taken as a whole--the one hundred plus MYCA camps constitute an industry that:

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<sup>1</sup> The Maine Department of Human Services, Division of Health Engineering establishes health and sanitation rules for camps and maintains a licensing program. The most recently available total number of licensed camps is 190.

- ✓ Provides a wide range of often life transforming youth development experiences to approximately 20,000 campers per year;
- ✓ Maintains nearly 17,000 acres of Maine's rural landscape and over 270,000 feet of lakefront property;
- ✓ Generates annual tuition revenue of over \$120 million;
- ✓ Provides over 8,000 seasonal and nearly 400 full-time, year-round jobs in Maine that generate an in-state payroll of nearly \$35 million each year;
- ✓ Purchases food, supplies, construction materials, professional services and a wide variety of other items that represent sales of over \$52 million annually to Maine businesses;
- ✓ Pays nearly \$5 million in local property taxes to Maine communities; and
- ✓ Generates over 130,000 visitor-days per year for the Maine tourism industry through the travel of families dropping off, visiting and picking up their children at camp as well as visiting camps they may want their children to attend; this travel represents approximately \$20 million in revenue to the hotels, motels, restaurants, gas stations, shops and other businesses these visitors patronize.

In addition to these direct effects, MYCA camps, through the supply-chain and payroll linkages of both its own spending and that of the visitors it brings to the state, have a much wider indirect and induced impact on the Maine economy. Analysis of these multiplier effects using the IMPLAN Pro 2 impact model of the State of Maine indicates that:

- ✓ the total annual impact of MYCA camps on Maine's economy exceeds \$245 million; and
- ✓ this spending supports nearly \$25 million annually in tax revenues for Maine state and local governments.

## II. The Direct Impact of MYCA Camps in Maine

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Youth summer camps, both residential camps encompassing multi-week sessions and non-residential day camps, have a long tradition in Maine, dating back to the turn of the 20<sup>th</sup> Century. Many private and religious organizations bought property along Maine's lakes and have, over the years, introduced thousands of youngsters to the beauty of the state's rural and wilderness areas. At the same time, they built thriving enterprises that employed Maine residents, provided substantial sales to local businesses serving the camps, helped preserve open space and rural character in the scores of communities where they were located and became major taxpayers in these communities.

As noted in Table 1 above, Maine's Department of Human Services currently licenses 190 youth camps in Maine. These camps include residential camps serving 400 or more campers per session, small day camps, short-term instructional camps and camps devoted to particularly focused populations. These camps are owned and operated by private businesses, by municipalities and by non-profit agencies. Approximately half belong to the Maine Youth Camping Association (MYCA), a trade association serving the interests of the industry.

The purposes of this study are to measure the magnitude of MYCA member camps as an industry and to estimate their overall economic and fiscal impact on the State of Maine. The basis of the study is a survey sent to all MYCA camps in January 2005. Planning Decisions, Inc. extrapolated from these survey results to arrive at an estimate of the magnitude of the group as a whole. The findings of that extrapolation are presented below. The entire youth camping industry in Maine is clearly larger than MYCA. However, because of the wide range of sizes, purposes and activities of non-MYCA camps, this study makes no attempt to estimate their economic impact from results obtained from the survey of MYCA members.

Planning Decisions, Inc. used the estimate of the size of the MYCA camps derived from the survey results as an input to the IMPLAN Pro economic model of the State of Maine to estimate the overall economic and fiscal impact of the MYCA camps on the state. The findings of this analysis are presented in Section III below.<sup>2</sup>

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<sup>2</sup> A copy of the survey instrument is included as Appendix One below. An explanation of how an estimate of the magnitude of the entire group of 109 MYCA camps was derived from the 71 responses received is included as Appendix Two below.

*1. The Location and Size of Maine's Residential Camps.*

The 109 camps of the Maine Youth Camping Association are thriving small businesses located in 77 Maine communities. They encompass over 16,000 acres of Maine's most scenic rural countryside and maintain active use of over 50 miles of lakefront property. Each year, they provide a wide range of youth development activities to 20,000 campers, introducing them and their families to Maine and the best features of its rural and wilderness character in ways that often generate lifetimes of return visits. They provide nearly \$5 million in direct property tax payments (and payments in lieu of taxes) to their host communities and provide thousands of seasonal jobs that help support local businesses. They also provide nearly 400 permanent, full-time jobs in Maine that keep their extensive properties in top shape and provide a degree of long-term stability in rural economies that are otherwise changing rapidly. Table 2 lists some of the indicators of the magnitude of MYCA member camps.

Table 2  
Measures of Size & Capacity of MYCA Camps, 2004

<b>Physical Plant</b>	109 camps
Acres	16,611
Waterfront (feet)	271,796
<b>Description of Operations</b>	
camper capacity (from MYCA website)	20,683
average days per season	56
camp utilization (from reported camper days)	17,671
number of camper-days per year	981,943
number of family visitor-days per year	114,397
--from Maine	27,613
--from outside Maine	86,784
number of prospective camper visitor-days per year	21,086
--from Maine	12,329
--from outside Maine	8,757
employment (number of people)	8,662
seasonal	8,143
year round outside Maine	140
year round in Maine	379

Source: MYCA survey, 2005.

## 2. The Revenue & Expenditures of MYCA Camps.

MYCA's direct economic impact comes from two sources. The first derives from the money spent in Maine to operate and maintain the camps. The second derives from the money spent by campers and their families traveling to the camps. This travel occurs when campers arrive, when they leave, when families visit at the camp and when families come to visit prospective camps they may choose to attend at a later date. The magnitude of these spending flows is listed below.

**Table 3**  
**Estimated Revenue & Expenses of MYCA Camps, 2004**

<b>Operating Revenue (\$)</b>	\$119,596,996	n.a,	\$119,596,996
<b>Operating Expenses</b>	(\$ spent, total)	(% spent in Maine)	(\$ spent in Maine)
Payroll (including benefits)	\$40,282,315	86%	\$34,607,377
Insurance	\$5,865,594	68%	\$3,978,245
Utilities	\$2,476,307	93%	\$2,291,756
Property Taxes/Payment in Lieu of Taxes	\$5,331,179	89%	\$4,732,900
Mortgage/Rent	\$2,100,339	89%	\$1,870,736
Maintenance & Repair	\$6,279,753	94%	\$5,874,412
Food	\$10,925,350	96%	\$10,534,217
Fuel	\$1,356,507	87%	\$1,182,349
Other Supplies	\$6,603,418	78%	\$5,150,666
Advertising	\$2,106,861	52%	\$1,091,065
Professional Services (legal, a/c)	\$1,499,751	67%	\$997,548
Any other notable expense	\$7,378,319	71%	\$5,206,718
Balance	\$13,507,328	70%	\$9,505,493
<b>Total Operating Expenses</b>	<b>\$105,713,022</b>	<b>82%</b>	<b>\$87,023,481</b>
<b>Capital Expenditure (average over last 5 years)</b>			
construction	\$22,308,849	91%	\$20,363,720
equipment purchases	\$18,495,847	93%	\$17,158,994
	\$3,813,002	84%	\$3,204,726

Source: MYCA survey, 2005.

Based on extrapolations from a survey of its members conducted in January 2005, Planning Decisions, Inc. estimates that MYCA camps make annual

operational expenditures of nearly \$106 million. Approximately 82% of this money is spent in Maine indicating a direct operational impact of over \$87 million.

In addition, these camps (based on average spending over the past five years) spend over \$22 million annually on construction and equipment purchases for their camps. Over 90% of this capital expenditure is spent in Maine resulting in another direct economic impact in Maine of over \$20 million.

### 3. *The Tourism Spending Generated by MYCA Camps.*

The third source of direct economic impact from MYCA camps is the tourism spending generated by visitors to the camps. Based on responses to the January 2005 survey, MYCA camps generated over 130,000 visitor days for Maine’s tourism industry. Table 4 summarizes the findings.

**Table 4**  
**Tourist Visits Generated by MYCA Camps, 2004**

Source of Visit	visitor days	visitor trips
family visit from Maine	27,613	27,613
family visit from outside Maine	86,784	34,713
prospect visit from Maine	12,329	12,329
prospect visit from outside Maine	4,378	1,751
total	131,105	76,407
from Maine	39,943	39,943
from outside Maine	91,162	36,465

Source: MYCA survey, 2005.

Assuming that trips from Maine are day trips and that trips from outside Maine average 2.5 days per trip means that the 131,105 visitor days translates into 76,407 visitor trips, 39,943 day trips from within Maine and 36,465 trips from outside Maine.

According to the most recent tourist expenditure survey conducted for the Maine Department of Community and Economic Development, the average expenditure per day trip was \$100 and the average expenditure per overnight trip was \$285.<sup>3</sup> Based on discussions with camp officials with regard to the nature of camp visitors and the duration and character of

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<sup>3</sup> Longwoods International Travel and Tourism in Maine The 2003 Visitor Study Management Report Prepared for the Maine Office of Tourism September 17, 2004.

their visits, Planning Decisions estimated that overnight visitors to MYCA residential camps spent 50% above the state average or \$428 per trip while day visitors spent the state average of \$100 per trip.<sup>4</sup> Multiplying these estimated expenditures by the estimated number of camp related trips yields estimated camp related tourist expenditures of nearly \$20 million. Allocating this total among the various segments of the Maine tourist industry in the same proportion as total state tourist spending yields the following estimate of camp related tourist spending by sector.

**Table 5**  
**Estimated Camp Related Tourist Spending in Maine, 2004**

Sector	Amount
General Merchandise	\$6,099,617
Food	\$5,457,552
Recreation	\$2,568,260
Lodging	\$2,247,227
Total	\$19,582,980

Source: Derived from figures reported in Longwoods International Travel and Tourism in Maine The 2003 Visitor Study Management Report Prepared for the Maine Office of Tourism September 17, 2004.

#### *4. The Direct Economic Impact of MYCA Camps.*

The direct economic impact of MYCA camps is thus the sum of their operational spending, their average annual capital spending and the tourist-related spending they generate. Table 6 summarizes these totals.

**Table 6**  
**Direct Economic Impact of MYCA Camps in Maine, 2004**

Category	Amount
Operational Spending	\$87,023,481
Average Annual Capital Spending	\$20,363,720
Tourist Spending	\$19,582,980
Total Direct Spending	\$126,970,181

In addition to the direct impact, this spending also generates indirect impacts that are explained in the following section.

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<sup>4</sup> This estimate is based on an estimate of the distance traveled by an "average" MYCA visitor and anecdotal evidence about their lodging and shopping patterns.

### III. The Total Economic Impact of MYCA Camps

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#### *Background*

The direct economic impact of Maine's residential camping industry reported in Table 6 above does not constitute the total impact of the industry on the Maine's economy. Both camp owners and tourist businesses buy a wide variety of goods and services to run their operations. These purchases represent sales to other businesses, many located in Maine. Camp owners and the operators of tourist related businesses purchase food, fuel and supplies, pay utility bills and engage local business professionals. In addition, all these vendors make their own purchases. Local lumber dealers, fuel suppliers, banks and accountants maintain their own payrolls and buy their own supplies. This ever-widening web of purchases back down the supply chain from the original activity of the camping industry is called the **indirect** impact of the industry.

As a result of the direct and indirect effects, households throughout the economy earn incomes and make consumption purchases. Camp employees spend money at local grocery stores, gas stations, movies and so on. The workers at these stores, in turn, pay their rent and mortgages, buy their groceries, pay their taxes, shop and engage in whatever other economic transactions their budgets and tastes allow. These consumption effects of both the direct and indirect impacts are called the **induced** impact of the camping industry.

In sum, the total economic impact of the camping industry on the state of Maine is made up of three components:

1. The *direct* effects; these are the purchases of the camping and tourist industries of approximately \$127 million listed in Table 6 above;
2. The *indirect* effects; these are the purchases made by industries down the supply chain that can be attributed to the \$127 million direct sales; and
3. The *induced* effects; these are the household consumption expenditures that can be attributed to the direct *and* indirect effects of the camping industry.

### *Adding It All Up: The Economic Impact of MYCA Camps*

Attempting to measure all these effects individually would be virtually impossible. While all businesses know their major customers, they track sales for accounting and management purposes, not for the sake of tracing the flows of inter-industry purchases throughout the economy. The web of economic inter-connection is so complex, and spending, like the ripples in a pond, moves so quickly from the point of original impact, that the only way to provide an estimate of the indirect and induced impacts is to use an input-output model explicitly designed to capture those interconnections.

As part of the process by which it gathers the data to prepare the numbers that comprise the Gross National Product and other national income accounts, the U.S. Department of Commerce gathers vast amounts of information on inter-industry purchases. With these data, it creates a national input-output table that distributes the entire output of the economy into a vast matrix that links the sales of each industry to the purchases of all other industries.<sup>5</sup>

To make this national data more useful for state and local purposes, a number of private companies create input-output tables adjusted to the particular industrial structure and pattern of the inter-industry purchases of each state. The IMPLAN Pro model is one such model. It was originally developed at the University of Minnesota for the U.S. Forest Service and has since been spun off as a propriety product sold and serviced by the Minnesota IMPLAN Group (MIG).<sup>6</sup>

Planning Decisions, Inc. used the expenditure data listed in Table 6 above as inputs into the IMPLAN model for Maine. Using these data as the direct impact, the model calculated the consequent indirect and induced impacts to arrive at an estimate of the total income and employment impacts of MYCA camps on Maine.

Table 7 presents the result of these calculations.

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<sup>5</sup> See Bureau of Economic Analysis [National Input-Output Table](http://www.bea.doc.gov/beahome.html) for more information. <http://www.bea.doc.gov/beahome.html>

<sup>6</sup> See Minnesota IMPLAN Group, Inc. for more information. <http://www.implan.com/index.html>

**Table 7**  
**Economic Impact of MYCA Camps on the State of Maine**

Industrial Sector	Spending (\$ million)	Employees	Income (\$ million)
MYCA Camps	\$ 107	n.a.	n.a.
Associated Tourism	<u>\$ 20</u>	n.a.	n.a.
<b>Direct Impact Total</b>	<b>\$ 127</b>	<b>1,600</b>	<b>\$ 43</b>
Indirect Impact	\$ 31	400	\$ 12
Induced Impact	\$ 87	1,300	\$ 38
<b>Total Impact</b>	<b>\$ 245</b>	<b>3,300</b>	<b>\$ 93</b>
<b>Multiplier</b>	<b>1.93</b>	<b>2.06</b>	<b>2.15</b>

Source: IMPLAN Pro model run by Planning Decisions.

These results illustrate the multiplier effect of the residential camping industry on the state of Maine. The direct spending of \$127 million by MYCA camps and related tourist industry generates an additional indirect spending of \$31 million and additional induced spending of \$87 million. This amounts to a total impact on the Maine economy of \$245 million and represents a multiple of 1.93 of the original \$127 million direct spending.

As noted in Table 2 on page 4, actual employment in MYCA camps exceeds 8,600. The vast majority of these employees, however, are purely seasonal. Using industry average employment to revenue ratios, the annual equivalent for direct employment in the camping and related tourist industry in 2004 was 1,600. Using the same ratios for the indirect and induced sales indicates associated employment of 400 and 1,300 respectively. In short, the direct employment impact of MYCA camps is approximately 1,600 jobs and, its indirect and induced effects support an additional 1,700 jobs for a total employment impact of approximately 3,300 jobs, representing an employment multiplier of 2.06.

Finally, these employment effects generate income for Maine workers. Again using industry average employment to income ratios indicates that the direct income effect of MYCA camps is approximately \$43 million and the total income effect is approximately \$93 million for an income multiplier of 2.15.

***Taxes Generated: The Fiscal Impact of MYCA Camps***

Finally, all of these effects—direct, indirect and induced—wherever they may occur, have a fiscal impact on state and local governments in Maine. Some portion of the transactions included in the above analysis become sales,

income, property, gas and other tax revenues to Maine governments, both through the property, sales, fuel, licensing and other taxes paid by the camps and related tourist businesses and through the individual taxes paid by those earning incomes from these industries. In 2004, this total amounted to approximately \$25 million. Table 8 summarizes the data.

**Table 8**  
**Fiscal Impact of MYCA Camps, 2004**

Tax Category	Amount (\$ million)
<b>State Government Revenue</b>	<b>\$ 12.3</b>
Sales and Gross Receipts Taxes	\$ 8.6
General Sales and Use	\$ 5.8
Selective Sales Taxes	\$ 2.8
Other State Taxes	\$ 3.5
Individual Income	\$ 2.8
Corporation Net Income	\$ 0.2
Death, Gift & Other	\$ 0.7
<b>Local Government Revenue</b>	<b>\$ 12.2</b>
Property Taxes	\$ 11.9
Excise & Other Taxes	\$ 0.3
<b>Total Tax Revenue</b>	<b>\$ 24.5</b>

Source: IMPLAN Pro model run by Planning Decisions and application of average rates from U.S. Bureau of the Census to income earned by total impact.

All impacts included, MYCA camps support approximately \$24.5 million in revenue to Maine state and local governments. This includes \$12.2 million to local governments, the vast majority in the form of property taxes. It also includes approximately \$12.3 million paid to state government, including \$5.8 million in general sales tax revenues, \$2.8 million in selective sales taxes such as the gas tax and \$2.8 million in personal income taxes.

## Appendix 1: Survey Instrument

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### Maine Camping Economic Impact Survey, 2004

The following information will be used to prepare a report on the overall economic importance to the State of Maine of the camping industry. Figures will be presented only in the aggregate. Individual responses will be kept strictly confidential. If you have any questions about the form, please call or email Charles Lawton. Please return (mail or email) the completed form to:

Charles Lawton, Senior Economist, Planning Decisions, Inc.  
P.O. Box 853  
York Harbor, Maine 03911 207-363-3541 (voice & fax)  
[clawton@maine.rr.com](mailto:clawton@maine.rr.com)

Thanks for your cooperation.

<b>1 Physical Plant</b>		
Camp Name		
Camp Location (municipality)		
Acres		
Waterfront (feet)		
<b>2 Description of Operations</b>		
weeks of operation ( summer / year round*)	( / )	
number of camper-days per year		% from Maine
number of visitor-days per year (family & other visitors)		
number of prospective camper visitor-days per year		
employment (number of people)		
seasonal		
year round outside Maine		
year round in Maine		
	Total \$ received	% in Maine
<b>3 Operating Revenue (\$)</b>	\$	n.a.
<b>4 Operating Expenses (\$ and % spent in Maine)</b>	Total \$ spent	% in Maine
Payroll (including benefits)	\$	%
Insurance	\$	%
Utilities	\$	%
Mortgage and/or Rent Payments	\$	%
<input type="checkbox"/> Property Taxes or <input type="checkbox"/> Payment in Lieu of Taxes – check appropriate box & provide dollar amount	\$	%
Maintenance & Repair	\$	%
Food	\$	%
Fuel	\$	%
Other Supplies	\$	%
Advertising	\$	%
Professional Services (legal, a/c)	\$	%
Any other notable expense ( )	\$	%
All other expenses	\$	%
Total Operating Expenses	\$	%
<b>5 Capital Expenditure (average over last 5 years)</b>	\$	%
construction	\$	%
equipment purchases	\$	%

\* Year round refers to "shoulder" seasons and other camp business.

## Appendix 2: Explanation & Interpretation of Survey Results

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In late January 2005, the survey above was sent to each of the 109 members of the Maine Youth Camping Association (MYCA). Responses were received from 70 camps. The purpose of this Appendix is to explain how the industry totals used above in the report were derived from these responses.

Twenty-eight of the MYCA camps also belong to a group called the Children's Camp Alliance of Maine. This group includes residential camps (as opposed to day camps) with a strong focus on campers from out-of-state. The other eighty-one non-alliance camps represent the full range of MYCA camps—for-profit and non-profit, traditional and subject specific (eg. music, basketball, adventure trips), in-state and out-of-state orientation. Response rates for each of these two groups are listed below.<sup>7</sup>

Table A2 #1  
Survey Responses by Camp Group

Camp Group	Responses	Non Responses	Total	%
Total Non-Alliance	46	35	81	57%
Total Alliance	<u>24</u>	<u>4</u>	<u>28</u>	<u>86%</u>
Grand Total	70	39	109	64%

The industry totals listed in the body of the report were derived from extrapolations of the data from these two groups of respondents.

### *Alliance Responses*

Planning Decisions, Inc. (PDI) received responses from 24 of the 28 Alliance members, an 86% response rate. To arrive at an estimated total for the group as a whole, PDI arranged all 28 camps in order of camp capacity (number of campers as reported on the MYCA website). This ran from a low of 100 to a high of 440 campers. PDI then inserted the non-respondents into their respective places based on their reported camper capacity. PDI estimated revenue for the non-respondents by multiplying capacity by the full season tuition reported on the website. PDI estimated expenses by applying the expense to revenue ratio from the closest size camp (based on camper capacity) for each of the expense categories and applying the resulting ratios

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<sup>7</sup> In a few instances one company operated two licensed camps, usually one for boys and another for girls. In these cases, the one survey response is counted as two responding camps.

to the estimated gross revenue. With the revenue and expenses thus estimated for the four non-respondents, PDI added the totals for all 28 camps to arrive at an estimate for the Alliance Camps as a whole.

The estimates of camper days per year, visitor days per year and prospective visitor days per year reported in the body of the report involved some interpretation of the results reported on survey responses.

For camper days per year, some respondents reported a calculated number (13,250 or 17,500 for example). Others reported a number of days (all between 48 and 70). PDI presumed that these were days the camp operated. For these, PDI multiplied the days reported by the camp capacity to arrive at a camper days number. The 386,558 total listed in Table A2 #2 below is the sum for all 28 Alliance members. Dividing by 28 yields an average per camp of 13,907. Dividing by the average 51 days per season yields an average number of campers per camp of 273. This number seems reasonable given the reported capacity range of 100 to 440.

The number of family visitor days involved slightly more interpretation. Some respondents reported relatively large numbers (from 250 to 3,800). PDI interpreted these as visitor days as requested. Other respondents reported small numbers (from 1 to 6). PDI interpreted these as the number of days family visitors did in fact visit and adjusted these numbers by multiplying by the number of campers and then by 2 to reflect an average visitor party of 2 people. The 30,042 visitor-days listed as the total for the Alliance is the sum of the unadjusted and adjusted responses.

The number of prospective-camper visitor-days also deserves some consideration. Some respondents reported relatively large numbers (100 to 400). PDI interpreted these as prospective-camper visitor-days as requested. Other respondents reported mid-range numbers (20 to 80). PDI interpreted these as the number of visitor parties and multiplied by a factor of 3 assuming an average party size of 3 people. Finally, some respondents reported very small numbers (1 to 12). PDI interpreted these numbers as the number of days when prospective visitors actually visited and multiplied these numbers by 5 based on an assumed number of parties visiting on a day and by 3 based on an assumed party size of 3 people. The 3,891 prospective-camper-visitor-days listed as the total for the Alliance is the sum of the unadjusted and adjusted responses.

The employment and revenue numbers are straightforward totals of responses.

Operating expenses are also simple sums of the responses given. The only caveat in these numbers concerns the last expense category "balance." Some respondents filled this in; others did not. In most cases, the total of operating expenses came within \$250,000 of revenues. In a few cases, however, there were more substantial differences. This leaves the question as to whether these respondents did not include some spending, bank mortgage payments for example. PDI adjusted for this discrepancy by presuming that those respondents with large unspecified amounts in the "balance" category in fact spent in the same proportion as the nearest camp above and below them in the size list.

PDI multiplied each respondent's expenditure total by the stated percent spent in Maine to arrive at a Maine spending for that expense category and added these across all camps to arrive at a total Maine spending for that category. PDI then divided by the total reported spending in that category to arrive at the Maine percent of the total spending (80% for payroll for instance and 86% for utilities). For purposes of the impact analysis, these are the numbers that will be the input into the impact model.

Finally, the construction and equipment spending numbers were straightforward calculations from the responses.

**Table A2 #2  
Maine Camping Survey, Total for Alliance Members, 2004**

Acres	5,131		
Waterfront (feet)	75,560		
camper capacity	7,130		
weeks of operation ( <u>summer</u> )	51	days/season = avg.	
number of camper-days per year	386,558		
number of family visitor-days per year	30,042		
number of prospective camper visitor-days per year	3,891		
employment seasonal	3,444		
employment year round outside Maine	69		
employment year round in Maine	81		

Operating Revenue (\$)	\$55,764,454		
Operating Expenses	(\$ spent)	(% spent in Maine)	(\$ spent in Maine)
Payroll (including benefits)	\$16,467,061	80%	\$13,197,174
Insurance	\$2,595,298	55%	\$1,424,633
Utilities	\$854,988	86%	\$736,816
Mortgage/Rent	\$3,268,149	80%	\$2,614,519
Property Taxes	\$1,148,015	100%	\$1,148,015
Maintenance & Repair	\$3,234,635	95%	\$3,071,748
Food	\$4,588,042	97%	\$4,440,570
Fuel	\$488,635	91%	\$443,262
Other Supplies	\$3,927,068	78%	\$3,075,736
Advertising	\$774,318	17%	\$128,315
Professional Services (legal, a/c)	\$540,392	55%	\$297,023
Any other notable expense	\$3,188,812	70%	\$2,245,835
Balance	\$4,979,656	71%	\$3,537,334
Total Operating Expenses	\$46,055,070	79%	\$36,360,980
construction expenditure	\$4,760,484	95%	\$4,522,460
equipment purchases	\$1,508,326	80%	\$1,199,658

### *Non-Alliance Responses*

As noted above, PDI received responses from 46 of 81 non-alliance member camps, a 57% response rate. Of the 46 respondents, 11 reported expenditures greater than revenues. Another 4 reported total expenses equal to or within a few percentage points of total revenue. For the remaining 31 respondents, PDI calculated an “other expenditures” figure by subtracting the sum of the reported individual expenditures from the reported total expenditures. This extrapolated total ranged from \$4,500 to \$550,000.

PDI also made an extrapolation regarding the percentage of expenses spent in Maine. Of the 46 responses, 10 left the percentage of spending in Maine blank. For these, PDI used the average of the 36 who did put in Maine spending percentages.

Finally, PDI used the average total per camper from the 46 responses for each of the variables to extrapolate to the universe of 81 non-alliance camps. This seemed to be a better method than using an average per camp because the average capacity of non-respondents (as determined by camper capacity reported on the MYCA website) was 190 compared to an average of 175 for

responding camps. In short, PDI assumed that the average revenue and spending per camp for non-responding camps was higher than that of responding camps because the average size of non-responding camps was larger. Thus, PDI used the average revenue and spending per camper derived from the 46 responding camps to extrapolate estimated totals for the 35 non-responding camps.

PDI then added the totals for the 28 alliance camps, the 46 responding non-alliance camps and the extrapolation for the 35 non-responding camps to arrive at estimated totals for MYCA as a whole. These are the totals reported in Table 2, Table 3 and Table 4 in the body of the report above.