

# The Impact of COVID-19 on Maine Youth Camps

Prepared for  
Maine Youth Camp Association

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September 2020  
(updated October 2020)

## Executive Summary

In addition to social, educational, and recreational opportunities, Maine youth camps provide an important source of economic activity supporting \$270 million in direct economic activity and thousands of jobs in a typical year. Summer camps rely on revenues from a short season to sustain camp operations throughout the year and like many small nonessential businesses and organizations, camps are facing unprecedented fiscal challenges as a result of the COVID-19 pandemic. Many camps have been forced to suspend or limit program offerings, resulting in foregone revenues leading to an uncertain future.

To understand the extent of these impacts, the Center for Business and Economic Research (CBER) at the University of Southern Maine (USM) was commissioned by Maine Youth Summer Camps (MSC) to conduct an analysis of the impacts and implications for youth camps in Maine from the COVID-19 pandemic. The analysis draws upon survey data collected from over 70% of registered Maine youth camps in August of 2020, as well as past studies of the economic impacts of summer camps in the Northeastern US and from secondary industry data accessible to the research team. The key findings of the analysis are highlighted as follows.

**The pandemic has severely impacted in-person programming.** Sixty-three percent of camps reported suspending in-person programming for the 2020 season and 21% offered an adapted program, while just 8% of camps offered regular in-person programming. The number of campers served in-person in 2020 dropped to 19,000 from 63,000 in 2019, a decline of approximately 70%. More than half of camps served no campers in 2020. Another 8,000 campers were provided programming virtually, though only a very small percentage of camps captured revenues from these efforts.

**Revenues in 2020 were highly impacted for the vast majority of camps.** Nearly two-thirds of camps experienced revenue declines of at least 70% in 2020 compared to 2019, including 28% of all camps realizing a 100% decrease in revenues. There is no clear pattern whether revenue declines are concentrated in small versus large camps. The broader economic implications of the pandemic have limited other sources of funding and fundraising camps benefit from. Organizations that typically provide support to local camps have struggled as well and were unable to make donations that they might otherwise have made.

**Employment and payroll wages have declined as well.** Year-round full-time staff declined by 38% between 2019 and 2020 and year-round part-time employment dropped by 50%, while seasonal full-time employment declined by almost 80%. For camps that offered in-person programming, finding workers during the pandemic was identified as a key challenge.

**The impact on the 2020 season and uncertainty of a prolonged pandemic raise concerns about future seasons,** though camps are adapting. Two-thirds of camps anticipate being able to open next season, barring further disruptions from a prolonged pandemic. Another 28% of camps have concerns about being able to open next season but intend to offer programming at this time. One percent of camps do not expect to open unless they are able to secure support, while another 6% are seriously concerned they will not be able to open.

**Camps use pre-paid tuition to cover expenses to maintain facilities during their non-operating period and to prepare for the next operating period.** These expenses include paying year-round staff, real estate taxes, insurance and electricity, as well as payments for goods and services in preparation for opening. Thus, much of the pre-paid tuition for the 2020 season had already been expended before the pandemic hit and mitigating public health measures were enacted.

**Unlike most other businesses, the vast majority of camps derive revenues only in the summer months.** This means that camps will not have an opportunity to again earn income until the summer of 2021.

**Camps are applying 2020 tuitions to future camp years, but still do not make up for lost revenues.** Camps reported that an average of 22% of the remaining 2020 tuition has been carried forward to next season. This has implications for future years' revenues. Unless a proportional increase in the number of campers and therefore additional revenue occurs, camps will still need to account for the fact that revenues carried forward do not replace lost revenues from 2020.

**Public health safety protocols have added significant expenses to operations.** Camps had to weight this to determine whether to open at all and how to provide programming.

**Short advance notice of state guidelines made opening prohibitive or a challenge for camps.** Several camps reported that late announced guidelines left little time to prepare and implement public health protocols to open. While a small number of camps were able to open, the significant costs of safety protocols were prohibitive for many camps to open.

**It is clear that the impacts of COVID-19 on camp operations will not be confined to 2020.** The loss of a season's revenue is devastating for most camps. While a majority of camps expect to be able to open next season, the uncertainty surrounding the pandemic and prolongation into 2021 pose significant threats to longer-term operations for camps. Policymakers, industry

leaders, and camp stakeholders should look forward to addressing the persistent challenges brought by COVID-19 over the next several years.

***“Assistance is needed for survival.”*** Financial assistance related to operations, especially beyond 2021 (forgivable grants), and to adapt to public health guidelines, including PPE, handwashing, and outdoor programming, among others, is critically needed. While not explicitly addressed in our data collection, it is our judgment that if future year programming and revenues are similarly impacted by the pandemic or some other event, there will be many camps that will be forced to cease operations, especially if substantial support is not available.

## Introduction

Summer camps play an important role in the identity and brand of Maine. For decades, camps have provided positive experiences for kids to learn, recreate, build lifelong friendships, promote stewardship of the natural environment, and help build emotional connections with place that often prompt people to return as an adult to live and work in Maine. Summer camps also provide an important economic contribution to the state economy and the communities that host them. In 2019, camps employed thousands of workers, pay millions of dollars in wages, and directly contributed an estimated \$270 million to the Maine economy. Camps also attract overnight visitors, including parents and family, to the state injecting additional spending of \$8 million into state and local economies.

Like many small nonessential businesses, summer camps have been significantly impacted by the Coronavirus (COVID-19) pandemic, both for the 2020 season and future operations. To understand the extent of these impacts, the Center for Business and Economic Research (CBER) at the University of Southern Maine (USM) was commissioned by Maine Youth Summer Camps (MSC) to conduct an analysis of the impacts and implications for youth camps in Maine. The analysis in this report draws upon survey data collected from Maine youth camps, as well as a past study of the economic impacts of summer camps in Maine.

## Methods

In August 2020, a survey was designed and administered electronically by CBER to approximately 180 organizations that normally provide youth camp programming in Maine. Email addresses were provided by MSC. The survey was open for three weeks and respondents were emailed several notifications and reminder emails to complete the survey. The survey was conducted anonymously and all responses shared in this report are provided in aggregate. Where applicable, measures to prevent identification of individual camps are used.

In total, 128 complete surveys were received and formed the basis of the analysis in this report. In all, the sample covers approximately 70% of youth camps in Maine and provides a strong representation across the spectrum of camp size, geography, and operating revenues. Survey responses were screened for completeness and consistency. There were some minor discrepancies on certain questions that could be adjusted based on other responses. In the event an answer was inconsistent and could not be adjusted, the observation was not included in the respective estimates.

The operational assumption for this analysis is the survey responses collected are an accurate representation of all youth camps in Maine. Data from survey responses were used as inputs into an economic model maintained by CBER of the Maine economy to determine the multiplicative employment effects associated with the industry, including the direct, indirect, and induced economic contributions. While not a comprehensive economic impact assessment, the estimates reported here provide an updated look at the overall contribution of the youth camp industry to Maine's economy and communities.

### *A Note on Employment Definitions*

Employment estimates in this report are reported in two formats. The first provides estimates of camp employment as reported by camps; year-round full-time, seasonal full-time, and year-round part-time employment. Year-round full-time employment refers to workers that are employed on a full-time status throughout the year and may include camp directors, administrative staff, and others. Seasonal full-time employment refers to camp staff that are employed on a full-time weekly basis for the camp season, generally confined to the core camp programming months in the summer. Year-round part-time employment refers to workers that are employed during the course of the year, but on a part-time basis throughout the week and may include positions such as facilities maintenance workers or other administrative staff.

The second format reports employment as full-time equivalents or "FTEs". This provides a means of comparison of the total employment impacts to other industries and "normalizes" employment on an annual basis. One FTE is equivalent to 1 person unit of labor for approximately 2,080 labor hours per year. Seasonal full-time and year-round part-time is converted to FTEs by applying weights of .25 per seasonal full-time worker and .50 per year-round part-time workers reported. Year-round full-time employment is assumed equivalent to 1 FTE.

The structure of the report that follows closely aligns with the structure of the survey questions asked of camps. A copy of the final online survey is included in the Appendix for reference. Respective questions are included at the beginning of each section in navy blue as asked in the survey. Throughout the analysis we include relevant comments from camps provided for certain questions which are highlighted in gray, centered, in quotations, and are reported unaltered.

## Summary of Survey Analysis

### Program Offerings during COVID-19 in 2020

*Question 2, 3, & 4: With respect to your core camp programming, please select the responses in the following 3 questions that best represent your operations for this season (2020):*

#### *In-person programming*

Almost two-thirds (63%) of all camps reported suspending in-person programming for the 2020 season, while just 8% of camps offered regular in-person programming and another 8% offered in-person alternative programming (Figure 1). One-fifth of camps (21%) offered in-person programming with an adapted schedule relative to a traditional season. Camps providing in-person programming reported shifting programs to address safety concerns. For example, one respondent is quoted as:

*“We offered a reduced number of day camp programs; moved all programs entirely outdoors, and added new safety protocols (different for different age groups).”*

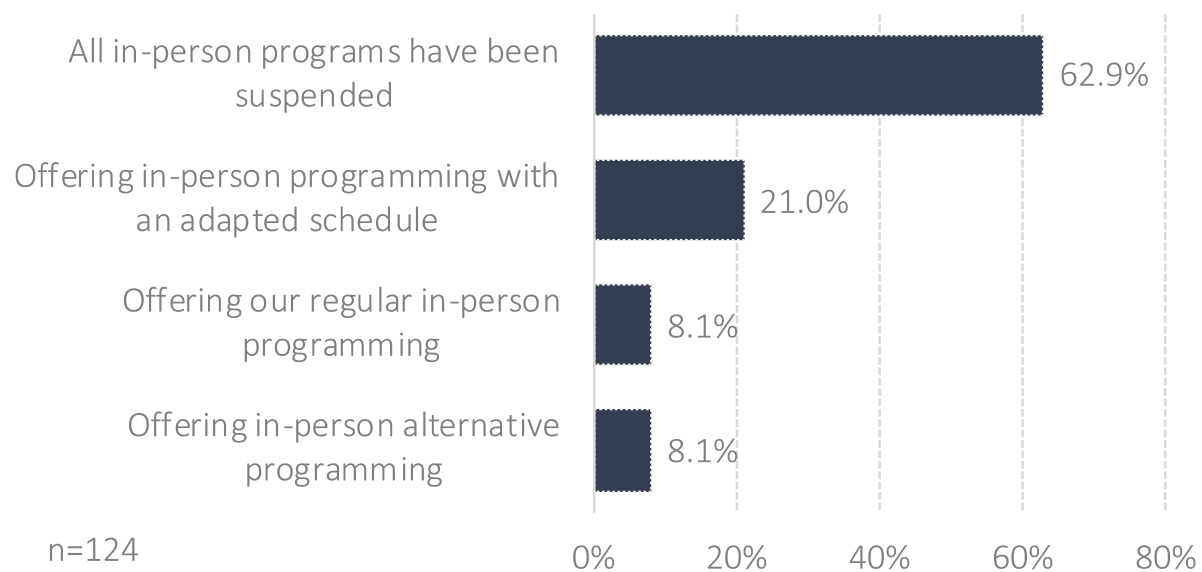


Figure 1: Camps Offering In-Person Programming during the 2020 Season (Question 2)

### *Virtual Programming*

A slight majority of camps (56%) did not offer remote or virtual programming (Figure 2). About two-fifths (40%) of camps offered remote or virtual programming without charging a fee, while just 4% charged a fee for virtual or remote programs.

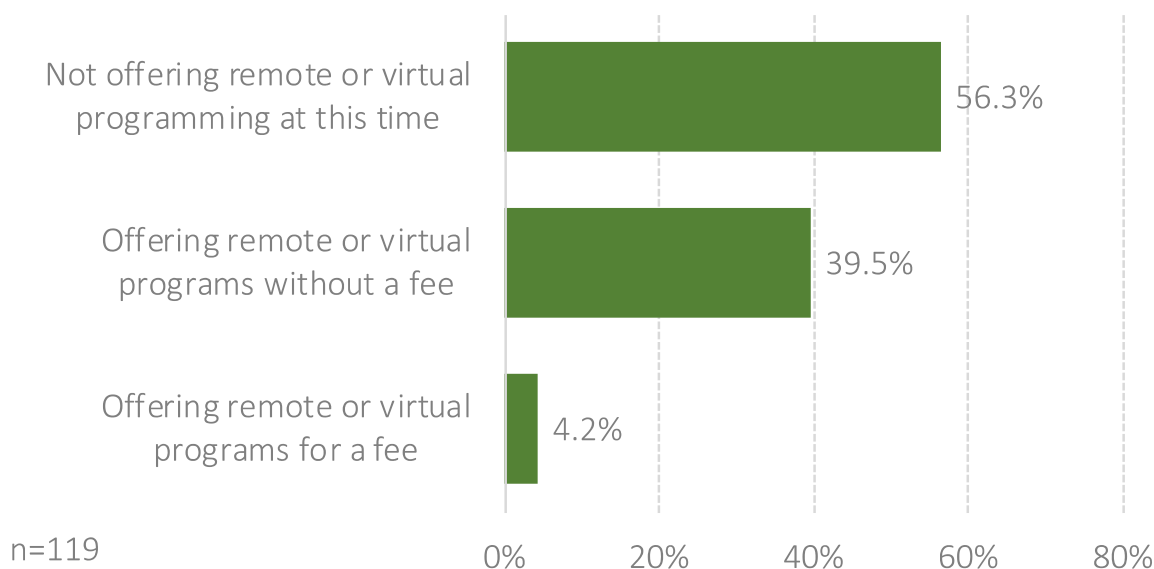


Figure 2: Camps Offering Virtual Programming during the 2020 Season (Question 3)

### *Other Revenue Generating Activities*

*Question 4: Is your camp offering family camp options, other rental opportunities, or revenue generating activities not listed in questions 3 or 4?*

Camps were asked if they are engaging in other business activities to generate revenues beyond their core operations. The vast majority of camps (83%) engaged in no other revenue generating activities beyond core programming (Figure 3). Of the camps that did engage in other opportunities, about 8% provided family camp options, while another 7% rented facilities for other uses. A small number of camps engaged in other revenue generating activities which focused on renting or hosting facilities. Camps were provided an option to provide details about other activities, which are highlighted below:

*“We offered a “camp in a box” option that sent supplies, directions, and videos home for each camper.”*

*“All regular camps cancelled. Renting staff cabins, running a restaurant, & have a small (40 kids) alternative in person camp for 2 weeks in August.”*



“Family Camp for 3 sessions. Running one of our camp options – a small specialty camp – not running our larger traditional camp program.”

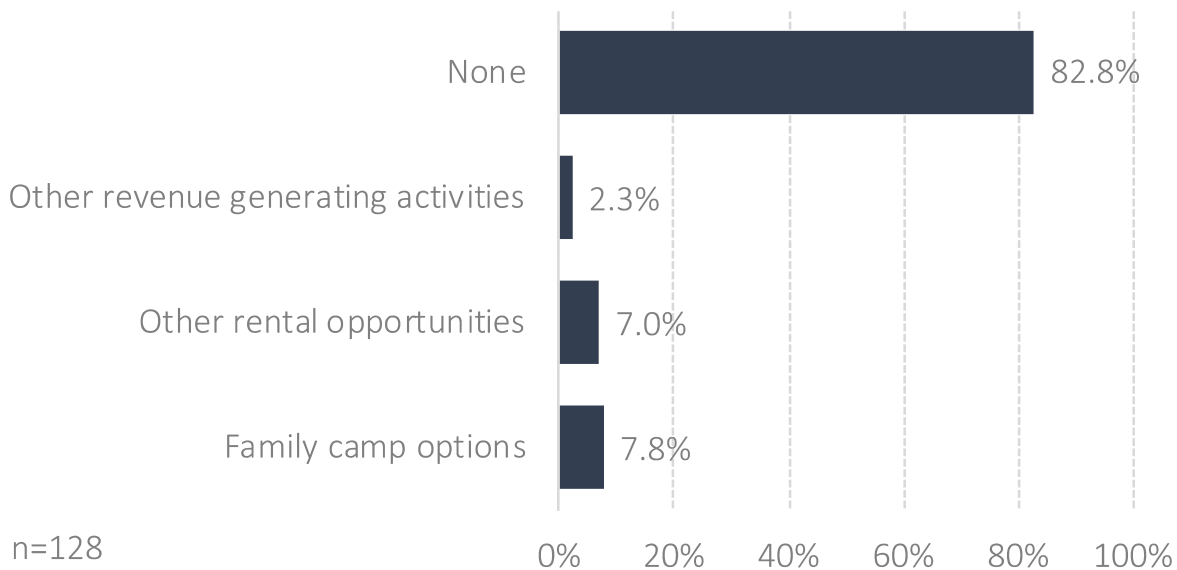


Figure 3: Camps Offering Other Revenue Generating Activities during the 2020 Season (Question 4)

## Campers Served

*Question 5: How many campers in total did you serve in 2019? Please include the total for the entire year.*

The number of campers served by each camp varies widely and reflects a diverse offering of programs. Based on survey data, the average camp reported serving 350 campers during the 2019 season, ranging from the smallest reported camp of roughly 30 campers to the largest camp reporting 3,500 campers.<sup>1</sup> The median number of campers is 300, suggesting the average is highly skewed by a few very large camps. Considering the total number of camps in Maine (180), this translates into more than 63,000 campers served in 2019.

*Questions 6 & 7: How many campers in total do you expect to serve in 2020? Please include the total for the entire year.*

As might be expected with a large percentage of camps not offering in-person programming in 2020 that the number of campers served also has dropped significantly. Across all camps an

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<sup>1</sup> One camp indicated it served over 3,000 campers in 2019, more than double the next highest camp and more than 10 times the median. This observation is considered an extreme outlier and was excluded from the mean calculations due to extreme bias.

average of 107 campers were served, while an average of 45 campers were served through virtual or remote programming. Of note, more than half of camps indicated that they served zero campers in 2020. Overall, approximately 19,000 in-person campers were served in 2020; marking a 70% decline in the total number of in-person campers. Another 8,000 campers were served through virtual or remote programming. Of the 37% of all camps that offered programming in 2020, these operating camps served an average of 195 campers compared to an average of 370 in 2019 by the same group of camps; a 47% decline in the total number of campers.

## Camp Employment

*Questions 8, 9, & 10: How many of the following staff type did you employ in 2019? (Full-time, part-time, and other)*

Based on the full sample, camps reported an average of 6.5 year-round full-time employees per camp, an average of 75 seasonal full-time employees, and an average of 1.5 year-round part-time employees. As with other metrics, large camps have an outsized impact on the calculation for average employment. Figure 4 and 5 show the distribution of camp employment by year-round full-time and seasonal full-time workers in 2019 based on responses from 70% of summer camps. Comparatively, the median year-round full-time employment per camp is 4, while the median seasonal full-time employment level is 55 per camp.

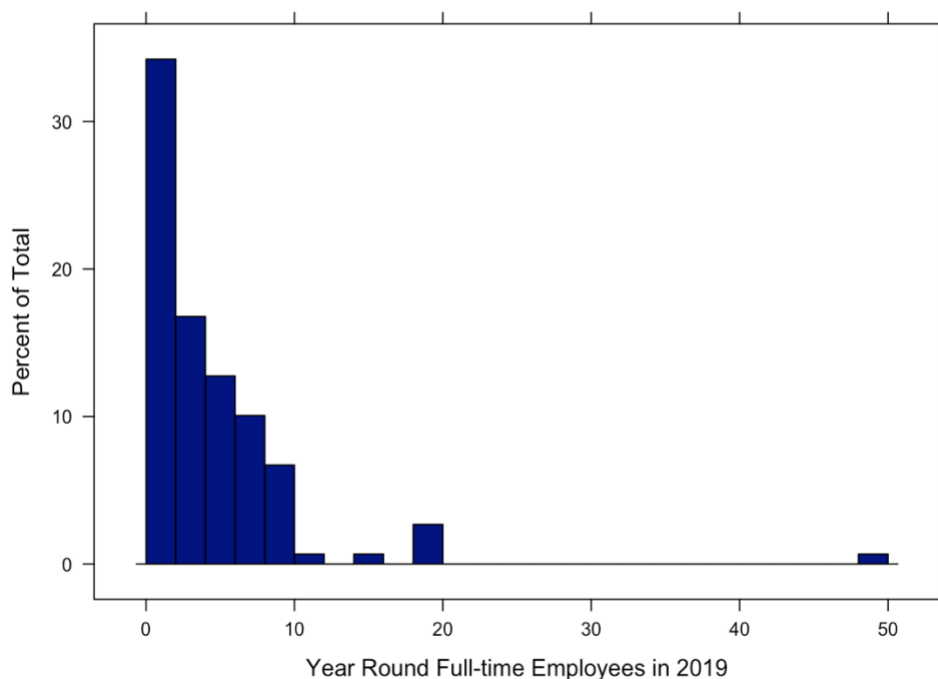


Figure 4: Distribution of Camps based on Year-round Full-time Employment in 2019 (Question 8)

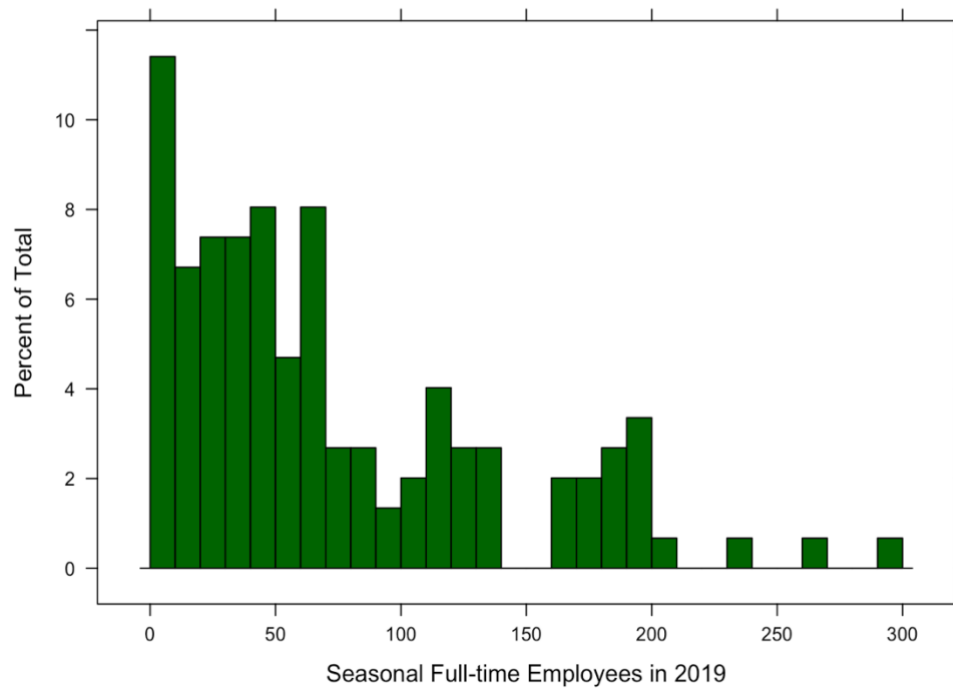


Figure 5: Distribution of Camps based on Seasonal Full-time Employment in 2019 (Question 9)

Weighting the average employment calculated from the survey to the estimated number of camps in Maine (180) provides total employment estimates of 1,170 (year-round full-time), 13,500 (seasonal full-time), and 270 year-round part-time jobs. This equates to approximately 4,635 FTEs in 2019.

*Questions 11, 12, & 13: How many of the following staff type do you expect to employ in 2020?*

Camps employed an average of 4 year-round full-time employees in 2020, approximately 16 seasonal full-time employees, and less than 1 year-round part-time workers.<sup>2</sup> Coincidentally, weighting by the number of camps provides an estimate of full-time employment in 2020 of 720 and part-time employment totaled 2,880, and 135 year-round part-time workers. While full-time employment appears to have only modestly been affected by COVID-19, part-time employment has clearly been significantly impacted.

<sup>2</sup> Large outliers that issued conflicting statements were removed for the purposes of this calculation. For instance, if a camp reported employment the same or similarly high levels of employees in 2020 as 2019 but also reported the camp was not offering in-person programming, the observation was excluded. This resulted in only a handful of observations being excluded that had a significant impact on the mean calculations and that distorted the overall estimates.

### Change in Employment as a Result of COVID-19

A comparison of employment reported in 2019 and 2020 shows a significant change (Figure 6). Camps clearly tightened finances and operated with fewer year-round full-time employees equating to approximately **one-third less full-time (38%)** workers and **50% less year-round part-time workers** over the same period. Seasonal full-time employment, on the other hand, was significantly curtailed following the suspension of programming for many camps and reduced programming and number of campers served for others. **Seasonal full-time employment declined by 80% between 2019 and 2020.** Seasonal full-time employment is typically filled by younger age workers 18-24; a group that has already been disproportionately impacted by the pandemic.

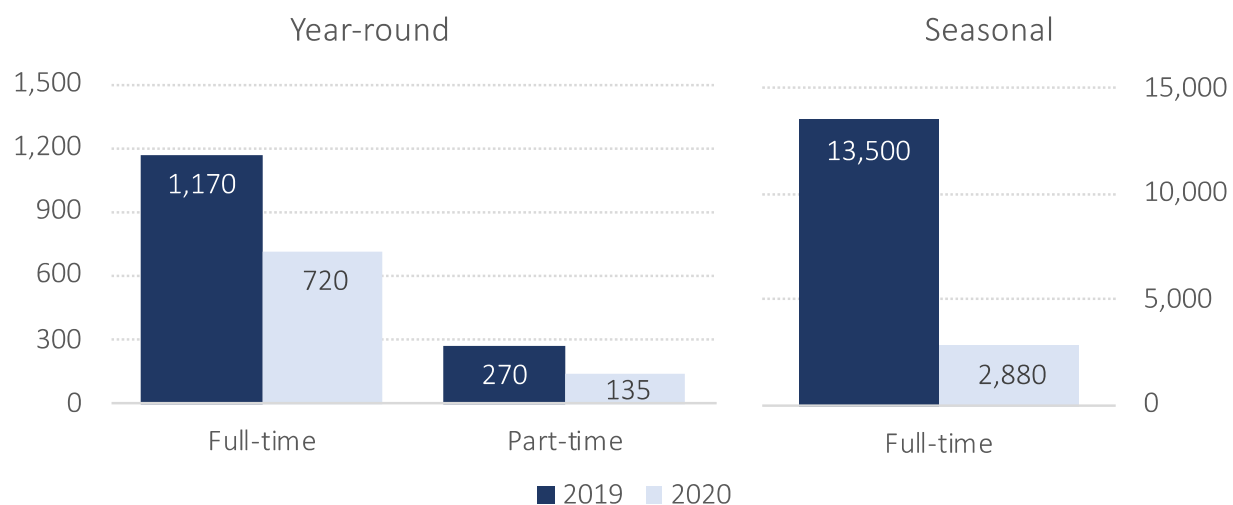


Figure 6: Employment Impacts of COVID-19 between 2019 and 2020

### Impact on Revenues

*Question 14: Please indicate what your annual gross revenue was in 2019. (This is a reminder that all data is anonymized when reported):*

Revenues reported by camps for 2019 ranged significantly, and based on the 104 camps that provided revenue information, the average camp in this sample generated \$1.5 million in gross

revenues.<sup>3</sup> Under the assumption an average of \$1.5 million is representative of all youth camps, annual industry revenues exceed \$270 million.

*Question 15: Compared to an average year (e.g. 2019), how do you expect your core programming revenues will be impacted in 2020 due to COVID-19? Please include revenues derived from core programming provided this season, as well as income derived from non-camp use of facilities. Exclude revenues received that are applied to a future season (e.g. tuition paid in 2020 applied to the 2021 camp season).*

Revenues from 2020 are significantly reduced compared to 2019 for virtually all camps. Nearly two-thirds of camps reported decreased revenues of at least 70%, with 28% reporting revenue decreases of 100% compared to 2019, indicating essentially zero revenues for the year (Figure 7). A small portion (2.4%) indicated that revenues increased this year. There is no clear pattern that emerges suggesting revenue declines are concentrated in small versus large camps. These percentages are representative of the full distribution of camps.

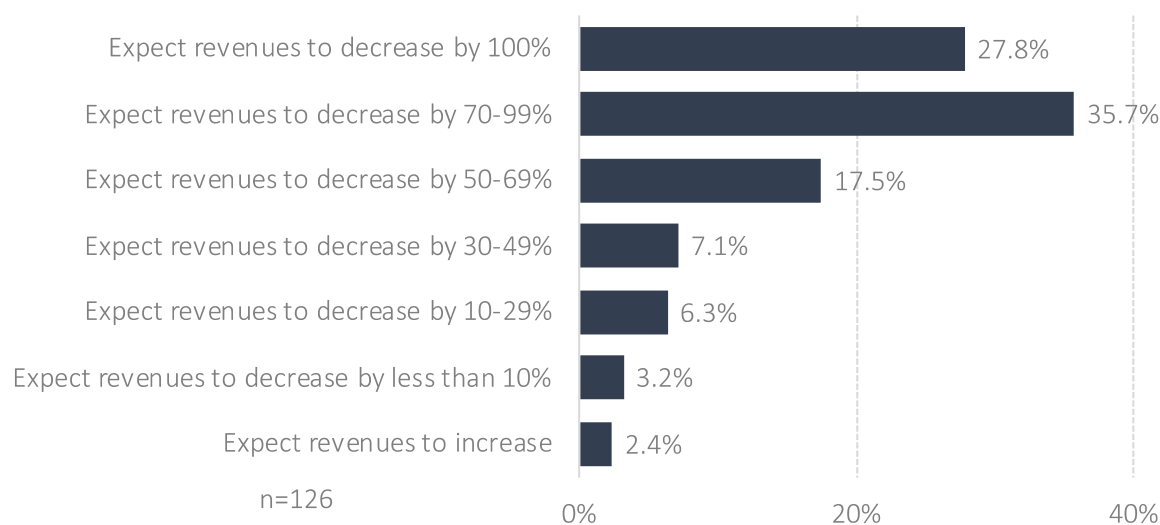


Figure 7: Expected Impact of COVID-19 on Camp Operating Revenues in 2020 (Question 15).<sup>4</sup>

<sup>3</sup> It is important to keep in mind that responses, and therefore this estimate, likely include all sources of revenues for the camp organization

<sup>4</sup> Includes revenues derived from core programming provided this season, as well as income derived from non-camp use of facilities. Exclude revenues received that are applied to a future season (e.g. tuition paid in 2020 applied to the 2021 camp season).

## *Carry Forward Tuition*

*Question 16: What percent of your planned enrollment tuition for 2020 has been carried forward and applied to a future camp season, if any?*

Many families pay for enrollment tuition well in advance of scheduled sessions, often in the previous year. In light of the pandemic, most all camps provided families with an opportunity to apply their 2020 tuition to a future camp season. Camps reported that an average of 22% of 2020 tuition has been carried forward to a future camp season. This has implications for future years' revenues. Unless a proportional increase in the number of campers and therefore additional revenue occurs, camps will still need to account for the fact that revenues carried forward do not replace lost revenue from 2020. However, the carry forward revenues provide camps with a very limited amount of operating capital to help bridge the gap where programmatic activities and revenues have been suspended for 2020.

## Likelihood of Continued Operations

*Question 17: In light of the impacts of COVID-19 on your operations this year (2020), how likely are you to open or offer programming in future years (2021)?*

About two-thirds of camps anticipate being able to open next season as camps are adjusting in preparation for continued disruptions from the pandemic (Figure 8). Another 28% of camps have concerns about being able to open next season but will likely offer programming. One percent of camps do not expect to open unless they are able to secure support, while another 6% are seriously concerned they will not be able to open.

*“Without expanded lending from the SBA and some sort of government relief, it seems unlikely we will be able to make it to a 2021 season”*

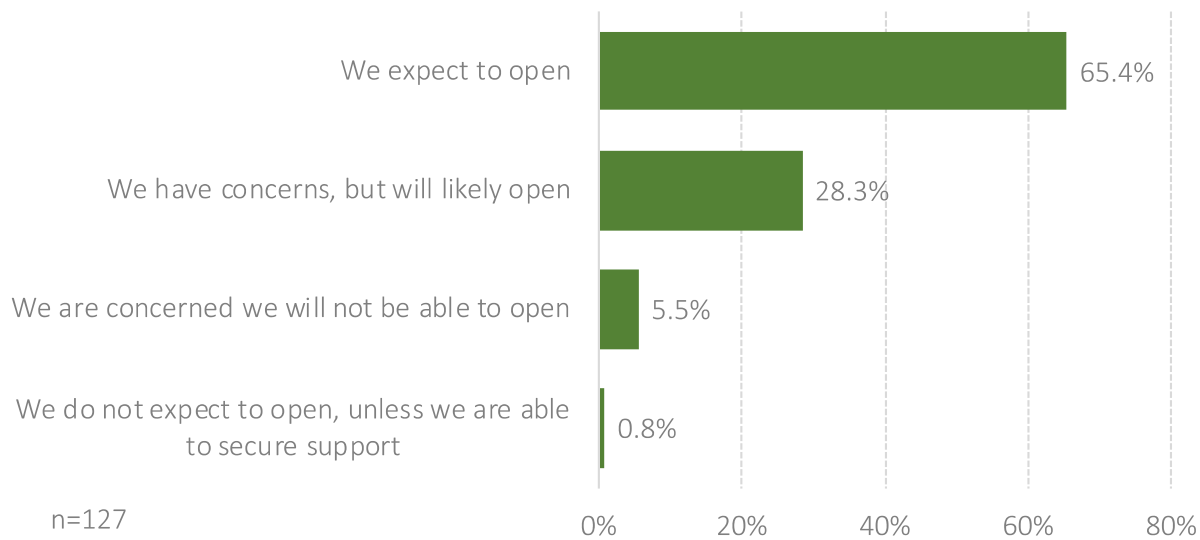


Figure 8: Reported Impact on Future Operations (Question 17)

## Financial Assistance

### *Past Experience*

*Question 18: Please briefly describe any experience with federal, state, or local aid/resources that you either accessed or attempted to access to assist your organization as a result of COVID-19, if any? (E.g. Cares Act Payroll Protection Program (PPP)).*

Camps identified several programs they have either accessed or attempted to access that include the federal Payroll Protection Program (PPP), Small Business Association (SBA) resources including economic injury disaster loans (EIDL), Finance Authority of Maine (FAME) programs, and the Maine Department of Labor (DOL) WorkShare program. Camps also reported accessing support and resources from the Maine Center for Disease Controls (CDC), the American Camp Association (ACA), and others.

Experience with the application process for PPP or other loan and grant programs were reported mixed and ranged from “mindboggling” to invaluable assistance from local banks. Although several camps reported that needs had been met so far, several camps that received PPP are waiting to see if loans will be forgiven and were hesitant to spend money because they were unsure about status of loan forgiveness. Other camps commented that available programs lacked flexibility to use funding or that aid and available resources are not the right fit to

address needs of seasonal businesses, such as camps. The range of camp sentiment regarding existing financial assistance is highlighted in the follow quotes:

“Conservative bank would not allow full needs for PPP. Received about 70% of May/June salaries in total.

“Got initial PPP loan; trying to get larger loan but being blocked by 1502.”

“Great experience with PPP, thanks to Norway Bank”

“CDC and ACA and MSC were invaluable”

“Norway Savings Bank was very helpful”

“I’m not completely sure but I think it is unlikely that we have applied for any of these options.”

### *Remaining Needs for Assistance*

*Question 19: What types of COVID-19 related assistance (federal, state, or local) would be most beneficial or supportive to your operations that are currently not available or accessible?*

Camps reported that additional assistance such as grants from federal, state, and local sources are needed. Needs expressed can generally be grouped into two buckets that include: 1) financial assistance related to operations especially beyond 2021 (forgivable grants), and 2) financial and technical assistance to meet COVID-19 related testing requirements and implementation of safety and public health measures. However, it is clear that needs vary from camp to camp and some measure of flexibility in the types of assistance is warranted. For example, some camps are seeking forgivable loans or bailout cash as opposed to short term loans that need to be repaid. The focus is also urgent in nature. Camps are primarily concerned with the next 6 months to 1.5 years and their ability to survive that period. In addition, camps are interested in support specific to providing a healthy business environment and meeting public health guidelines. Specific comments are reported below and grouped by focus.

#### 1. Financial assistance related to operations especially beyond 2021 (forgivable grants)

“Specific grants for camps – and loan forgiveness for seasonal business such as camps.”

“grants as opposed to loans since next year we’ll also take a hit due to the rolled over deposits and tuition from this year.”



“Additional PPP or SBA EDL loans – we do not currently have the resources to pay our full-time staff and bridge to next season’s likely revenue season.”

“camp specific relief for loss of 2020 tuition”

“Any grant options from the state to help get through the next 12-20 months.”

“general support to help us survive and keep year-round staff on for 2021 season”

“assistance with paying staff, real estate taxes, insurance and electricity.”

“Help with real estate taxes and insurance costs”

“bail out \$ with (not loans)”

“Business Interruption Assistance”

“Business interruption insurance”

“camp specific relief for loss of 2020 tuition”

“Grants to support extra effort needed to modify 2021 camp if COVID is still an issue”

“more support financially, business interruption insurance, block grants.”

“No interest loans to get through this year’s payroll and starting out next year with 4-5 months of very little revenue to pay for staff salaries.”

“Not sure. Are biggest loss has been in funds to continue to maintain our facility. Funds for capital maintenance would be helpful.”

“PPP extension for another 6 months (relief); leverage on Insurance business interruption (recovery), unrestricted grant \$ eligible for 2021 season (recovery)”

“SBA – EID was capped at \$150k (not enough); SBA 504 not available to non-profits; Main Street Lending has money but, guidelines too restrictive for non-profits”

“short term loan for operational expenses or another ppp loan”

“Short Term loans to hold over programming.... we do not have Full Time employees”

2. Financial and technical assistance to meet COVID-19 related testing requirements and implementation of safety and public health measures. Applicable direct comments include:

“assistance with cost of testing if required and or recommended”

“assistance with COVID related costs like PPE, individual supplies, technology, etc.”

“Extended PPP, grants for purchasing of PPE and hiring of medical staff, readily available/cheap/accurate/timely results COVID-19 testing access for camps”

“Free local covid-19 testing with results within 5-10 hours. Supplies such as hand-sanitizer, wipes, face shields, gowns, gloves, and surgical face masks.”

“funding to help cover costs of ramped up health monitoring, quarantining, etc.”

“Local, state or federally provided PPE and testing”

#### *Other comments*

*Question 20: Please feel free to provide any additional comments regarding the impacts of COVID-19 on your camp operations:*

Camps were given an opportunity to provide general comments on the impact of COVID-19 on camp operations. All comments provided are reported in the Appendix to this report, with a summary of key themes provided below.

- **“Assistance is needed for survival.”** While some camps were able to successfully open and others were able to earn some income and access certain federal or state assistance, many organizations were not able to and cited the pandemic as devastating for operations and for the communities that several camps serve, such as low and moderate income families. Assistance and programs to support camps as well as amended regulations and policies will prove critical to enabling the survival and continued operations for a number of camps.
- **It is clear that the impacts of COVID-19 on camp operations will not be confined to 2020** and will extend well beyond 2020 as camps grapple with major cash flow disruptions and revenue losses, struggle to rebuild a customer base, implement safety protocols, find staff to hire, and operate under significant uncertainty. Given there was little to nothing that could be done for the 2020 season, policymakers, industry leaders, and camp stakeholders should look forward to addressing the persistent challenges brought by COVID-19 over the next several years. Those policies and support

infrastructure should be flexible given the uncertainty of how long COVID-19 persists beyond 2020, as it surely will, as well as consider a new normal for society.

- **Short advance notice of state guidelines to opening proved to be a concern for several camps.** Several camps reported that late announced guidelines left little time for camps to prepare and implement protocols to open. While a number of camps were able to open, the significant costs of safety protocol were prohibitive for many camps to open.
- **Public health costs such as PPE, handwashing and hygiene stations, and other safety protocols have added significant expenses to operations.** Camps had to weight this to determine whether to open at all.
- **Regulations could be adjusted to provide camps greater operational flexibility** in the types of services they provide, such as day camps, after school programs, or support for kids that will be remote learning during the school year.
- **Hiring seasonal staff to work under pandemic conditions was a significant challenge** for camps that decided to open.

## Economic Contribution to the Maine Economy

To calculate the economic contribution of youth camps, we use two model inputs from the estimates of total direct industry employment and total direct industry revenues or sales. These estimates are used to calculate the multiplier effects based on US BEA Regional Input-Output Modelling System (RIMS-II) multiplier coefficients for employment and sales by industry.

We use the industry derived estimate of average revenues per establishment to calculate total youth camp industry revenues of \$270 million. Based on US Bureau of Economic Analysis (BEA) published multipliers the \$270 million in direct revenues support an additional \$226 million elsewhere in the economy through supplier and worker recurrent spending that ripples through the economy for ***a total economic contribution of \$496 million.***

Camps employ year-round full-time, seasonal full-time, and year-round part-time workers. For economic impact modelling purposes, employment totals for each group are converted into FTEs and reported as such. Camps directly supported 4,635 FTEs in 2019, a level comparable to the paper manufacturing industry (4,584) in 2019<sup>5</sup> and 2.5 times the level employed by the popular craft brewing industry (1,910).<sup>6</sup> Camp direct employment supports an additional 1,575 FTEs elsewhere in the Maine economy through supplier spending (indirect effects) and spending by workers on local consumption (induced effects). In total, youth camp industry operations supported an estimated 6,210 FTEs in 2019.

## Economic Losses Resulting from COVID-19

Based on reported impacts of revenue and employment by camps, we calculate the total economic impact by COVID-19 on Maine youth camps. Year-round full-time employment is estimated to have declined by 450 jobs (38%), while seasonal full-time employment is estimated to have declined by 10,620 jobs (80%) and year-round part-time employment declined by 135 jobs (50%) in 2019 compared to 2020. This equates to a loss of about 3,240 direct FTEs (70%) and associated payroll in 2020. If multiplier effects are assumed to be proportional, the direct losses would also add another 1,100 jobs lost elsewhere in the economy.

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<sup>5</sup> Maine Department of Labor Center for Workforce Research and Information; QCEW series 2019 NAICS 322.

<sup>6</sup> Crawley, A. 2018. "The Economic Contribution of the Craft Brewing Industry in Maine." Department of Economics, University of Maine. See <https://www.craftbrewingbusiness.com/wp-content/uploads/2019/01/2018-Economic-Impact-Report.pdf>.

It is important to point out that to the extent these jobs are “lost” really depends on the context and nature of the positions. While there is likely to be some losses in the economy, the magnitude may not be as severe as these estimates suggest. Assuming the economy rebounds and resumes next season, it is likely that many of these jobs will be restored, especially given the temporary nature of the seasonal work. However, it is possible that some or all of these jobs do not come back if assistance or resumption of the normal economy does not take place. Given camps are an important source of seasonal full-time employment for younger age populations, these prospects if occurred, would eliminate employment and skill building opportunities for the future workforce.

Employment declines translate into roughly \$189 million (70%) in camp revenue losses (direct impact) compared to 2019. Another \$160 million in indirect and induced spending may also be impacted. In total, revenue losses in the youth camp industry have a cumulative effect of a \$349 million drop in economic output (activity), inclusive of direct and multiplier impacts in the Maine economy. Given that some camps accounted for tuition carried forward to 2021 as revenues in 2020, the estimate of losses likely undercount the total actual forgone revenues and losses experienced in the 2020 season. An appropriate way to interpret this estimate is that revenue losses were at least 70% of a typical year. In addition, we expect unrealized revenues from overnight visitors to exceed \$5 million based on the reduction in the number of in-person campers and associated overnight visitation based on past estimates.

## Conclusions

Maine youth camps make important economic contributions to the state economy and are a source of good jobs and learning opportunities and human capital building for our youth. The COVID-19 pandemic has presented dire circumstance for businesses across the economy and camps in particular, as seasonal revenue losses and additional operating costs make long-term viability uncertain for many camps. Policymakers and organization leaders should consider acting to address the viability of future seasons and camp sustainability, provide business technical assistance, support for implementing public health measures, and provide general forgivable financial assistance to whether the uncertainty brought by these times.

## Appendices

# A Survey of the Impacts of COVID-19 on Maine Youth Camps

You are invited to take part in a research project being conducted by the Maine Center for Business and Economic Research at the University of Southern Maine. The purpose of this research is to better understand how the COVID-19 pandemic has impacted youth camps in Maine. This research is being sponsored by Maine Youth Camp Association.

If you decide to participate, you will be asked to take an anonymous survey. It should take you about 5 to 10 minutes to complete. Except for your time and inconvenience, there are no risks to you from participating in this study. This research will provide important information on how youth camp organizations have been impacted by the COVID-19 pandemic and help inform efforts to garner support and resources for the industry. Data from this study will be stored anonymously and no identifiable information will be linked with your response. Data will be kept on a password-protected computer and reported in aggregate.

Participation is voluntary. If you choose to take part in this study, you may stop at any time. You may skip any questions you do not wish to answer, but answering all of the questions will help us obtain a better idea of how camps have been impacted. Submission of the survey implies consent to participate.

If you have any questions about this study, please contact Dr. Ryan Wallace at [usmcber@maine.edu](mailto:usmcber@maine.edu) or 207-780-5859. If you have any questions about your rights as a research participant, please contact the Office of Research Integrity and Outreach, University of Southern Maine, 207-780-4517 or e-mail [usmorio@maine.edu](mailto:usmorio@maine.edu). Thank you for your participation.



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Q1 Please provide the zip code of your camp's primary location:

With respect to your core camp programming, please select the responses in the following 3 questions that best represent your operations for this season (2020):

Q2 In-person programming

- ☐ Offering our regular in-person programming
- ☐ Offering in-person programming with an adapted schedule
- ☐ Offering in-person alternative programming
- ☐ All in-person programs have been suspended

Q3 Remote or virtual programming

- ☐ Offering remote or virtual programs for a fee
- ☐ Offering remote or virtual programs without a fee
- ☐ Not offering remote or virtual programming at this time

Q4 Is your camp offering family camp options, other rental opportunities, or revenue generating activities not listed in questions 3 or 4? If so, please explain:

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Q5 How many campers in total did you serve in 2019? Please include the total for the entire year.

How many campers in total do you expect to serve in 2020? Please include the total for the entire year.

Q6 In person

Q7 Remote / virtually

How many of the following staff type did you employ in 2019?

Q8 Full-time

Q9 Seasonal

Q10 Other

How many of the following staff type do you expect to employ in 2020?

Q11 Full-time

Q12 Seasonal

Q13 Other

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Q14 Please indicate what your annual gross revenue was in 2019. (This is a reminder that all data is anonymized when reported):

Q15 Compared to an average year (e.g. 2019), how do you expect your core programming revenues will be impacted in 2020 due to COVID-19? Please include revenues derived from core programming provided this season, as well as income derived from non-camp use of facilities. Exclude revenues received that are applied to a future season (e.g. tuition paid in 2020 applied to the 2021 camp season).

- ☐ Expect revenues to increase
- ☐ Expect revenues to decrease by less than 10%
- ☐ Expect revenues to decrease by 10-29%
- ☐ Expect revenues to decrease by 30-49%
- ☐ Expect revenues to decrease by 50-69%
- ☐ Expect revenues to decrease by 70-99%
- ☐ Expect revenues to decrease by 100%

Q16 Approximately, what percent of your planned enrollment tuition for 2020 has been carried forward and applied to a future camp season, if any?

Q17 In light of the impacts of COVID-19 on your operations this year (2020), how likely are you to open or offer programming in future years (2021)?

If not applicable, please explain:

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Q18 Please briefly describe any experience with federal, state, or local aid/resources that you either accessed or attempted to access to assist your organization as a result of COVID-19, if any? (E.g. Cares Act Payroll Protection Program (PPP)).

Q19 What types of COVID-19 related assistance (federal, state, or local) would be most beneficial or supportive to your operations that are currently not available or accessible?

Q20 Please feel free to provide any additional comments regarding the impacts of COVID-19 on your camp operations:



## Question 20 Comments

ID_CBE R	Q20
31	100% loss of a full year of revenue for seasonal businesses is devastating. We are unable to fully utilize PPP forgiveness because we are not able to open.
16	<b>A lack of regulatory flexibility is hurting our ability to pivot, and hurting local community. An extension of our seasonal dates may allow us to operate as a hybrid daycamp/afterschool program for kids who have to attend remote school, but is not permitted under current rules. Besides this, the long term consequences, in loss of revenue to perform cap expenses, access favorable credit for refinancing, or service existing debts, is problematic. A moratorium on foreclosures would likely provide the breathing room needed to allow industry recovery, otherwise, the next 2-3 years are likely to see a significant number of camps cease operations.</b>
40	<b>All our post camp wedding rentals also cancelled. We will be financially impacted for summer 2021 due to carrying over/ rolling over 2020 tuition that has already been spent on expenses prior to summer 2020..</b>
106	<b>As we try to prepare for next summer, getting the funding to put in more hand - washing sinks, more outdoor covered space to prepare for full on outdoor activities, more nursing support and adequate social work assistance to help deal with physical and mental health issues that are likely to still be in play come 2021.</b>
10	Assistance is needed for survival.
65	<b>Because we lost the opportunity to register "new" campers from March - June, we enter 2021 with fewer core customers and must rebuild our client base in an environment in which customers are hesitant or unable to spend money. We expect that our much-smaller core will remain loyal but it will take years to rebuild the customer base.</b>
74	challenging
33	Complete shut down
29	<b>COVID 19 has had a huge impact, not only camp programming but camp funding. Everything from concerts, state fairs and special like Darling's Ice Cream Truck were cancelled, so many civic groups that would normally support us and other nonprofits were not able to raise funds. Our fundraising ability has been dramatically reduced due to the pandemic.</b>
105	Financially devastating for us. Sets us back many years
51	Glad we were able to open, but the finances are still grim.
27	Had to cease all summer operations and rely on PPP and bank loans to make payroll until 2021 camp season.
56	Has been a major loss for the campers and staff, and a huge hit on our nonprofit organization.

15	I feel the <b>insurance industry</b> owes us something. We pay into our Loss of Bus. Revenue annually 2019 and 2020 and get nothing in return, there seems to be no sense in paying for insurance. Because it is a pandemic we get zero
94	It has been a hard year financially and emotionally. I think we all feel deflated and exhausted and still face the uncertainty of next year.
61	It might lead to the decimation of our camp, primarily bc we lost our location (we rent) but we are working to find a new location, or possibly buying a location.
39	It sucks!
59	<b>it was very hard and very expensive to open we spent in excess of \$250,000 in covid related expenses, PPE, MASKS, TESTS, EXTRA STAFF,</b>
72	It's been tough. We are very lucky in that our operation is small enough and we had about 50% of our families rollover their money to next summer. But with <b>so much uncertainty still in regards to what the fall/winter looks like, we are not out of the woods yet. Most of our returning families would already be re-enrolled for next year at this point and many of them are not willing to put money down for camp without knowing for sure that we will be able to operate.</b> We are going to have to budget and plan for an extremely small 2021 season at this point, in the hopes that we will see a big increase April-June once families can be more certain of the future. There is also a huge concern with regards to how long schools will stay in session for and for how long colleges will go for. This could impact how we plan our dates for next year and we might be looking at a shorter season which will also impact our revenue.
9	Its devastating to try and exist and hold on with no revenue at all. We need help.
70	Lots of <b>additional stress on staff to modify programs, daily vehicle cleaning, needing to purchase enough tents for campers to have own, challenges of maintaining original cohorts as camper and not being easily able to then move campers into groups from other cohort with similar skills. Also, frustrated to see several day camps operating essentially business as usual. Just two days ago saw a group of 50 - 60 youth and their leaders playing new games with no distancing or masks. Hard to compete if you try to follow the rules.</b>
103	Other than not being able to serve more families, <b>staffing was a nightmare.</b> Finding staff to work through a pandemic proved to be difficult. <b>Transportation was also a huge issue,</b> but we were able to offer it with lower camper numbers.
104	Our families are middle to lower middle class worried about the long term effects on them
69	<b>Our largest impact has been increased costs associated with staffing and PPE. We have a lot higher operation costs this year.</b>
97	Seasonal hiring was delayed causing onboarding issues due to the late revela of the state's guidelines; our PPE expenses have greatly cut into our revenue
18	shoulder season programs (June and September) may be impacted permanently. They only make up 10% of an annual revenue stream and will be the first to go if calendar and capacity adjustments continue on into 2021.

22	Smoking Crater. We made the right choice to close, but the cost has been even tougher than expected and we expected it to be tough.
113	<b>The biggest impact I think from COVID19 will be something that would be very hard to measure, and it is the fear that people now have of gatherings and "living" situations other than their family or direct social circle.</b>
19	<b>The impact of our operation greatly effects the local economy (employment, consumer purchasing, tourism, state parks, etc.)</b>
93	The impacts were devastating, not just from a financial standpoint but also from the loss of services we provide to Maine families. Our campers are suffering the most from COVID from lack of enrichment and social/emotional programming. We are lucky as well that we are able to keep working, and with luck can look to a future. If the 2020 season doesn't happen, I'm not sure what will become of our non-profits as we are dependent on working with schools and youth camps to keep our business model afloat.
60	The most devastating part of offering camp this year was the extremely late publication of the governor's checklists for overnight camping.
99	The only benefit is it has allowed us to do some deferred maintenance. Our alumni, friends and foundations have donated substantially under the circumstance and loss of tuition revenue so we should be able to balance the budget for 2019-20
14	The time frame with which the state of Maine issued guidance to camps for opening, was too late to allow camps to adequately prepare to open.
34	<b>There will be a significant hesitation on the part of families to give us deposits and partial tuition for 2021 until we get close the dates.</b>
13	This is a huge setback to our camp in every way!
11	<b>This was going to be our first year and so we put a lot of money into marketing had camps 80% full only to not be able to hire staff coming from out of state in time for camp to start.</b>
115	We are the only arm of the UMaine System this is not base funded (minus soft money grant funded folks) Without tuition, we plummet instantly into the red. I'm sure this is common for most camps as well, yet we can't access the PPP, so it hurts even more.
32	We followed the Maine CDC Guidelines. We had our staff and campers quarantine for two weeks before they arrived at camp. We did multiple COVID-19 testing on-site.
82	We have fundraised successfully to cover our shortfall this year. If we weren't a non-profit, I'm not sure what we would have done
6	We have no need to assistance. We opened camp which turned out to be the greatest decision we ever made. We are in great shape and our customers could not be more happy with us. And we had no COVID.
127	We opened and were incredibly successful. We have well over 200 enrollments for 2021 and we have been done for only a week

75	We opened camp 1) to provide a service to our camp families, 2) to identify, implement and practice new safety protocols on campus, 3) to reopen our campus to boost fall enrollment, to confirm value as an independent school
121	We shut camp down completely have not made any hires. The only two employees that have been kept on full-time regarding camp operations are the camp director and groundskeeper.
5	We were set to celebrate our 75th season...it was the hardest decision we have ever had to make but ultimately, we put our campers and staff first and made the correct decision to suspend operations for 2020.
12	Will need loan assistance to survive/ Banks are cash flow lenders and there is no cash flow/ Need to borrow against assets until "normal" resumes