



Outdoor Ministries Connection

2018 Director Survey

Full Data Report

Participating Organizations:

United Methodist Camp and Retreat Ministries

Lutheran Outdoor Ministries

Presbyterian Church Camp and Conference Association

Episcopal Camps and Conference Centers

Outdoor Ministry Association of the United Church of Christ

Outdoor Ministry Association of the Church of the Brethren

United Church of Canada Outdoor Ministries

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Summer 2019



SACRED PLAYGROUNDS

Supporting camps and congregations through research and training

About this Report:

The founders of Outdoor Ministries Connection (OMC) committed themselves to research as one of several ministry priorities. The first director survey was conducted in 2014 as part of a grant-funded research initiative called The Confirmation Project. This initial survey focused almost exclusively on summer camp ministries. Four of the OMC member organizations were included in The Confirmation Project and took part in the research. Following the success of this initial survey and hoping to establish a benchmark survey of Mainline Christian camp and retreat ministries, OMC funded a follow-up survey in 2016, including all of its member organizations and expanding the survey to include items related to conferences and retreats. The 2018 survey, again funded by OMC, represents the third bi-annual survey of directors in Mainline camp and retreat ministries. With data from 3 surveys over a span of 5 years, we can begin observing trends in the data.

The 2018 survey included 100 survey items and typically took a director 25 minutes to complete. It had a completion rate of 90%, providing a high degree of reliability for the data set as a whole. Participating organizations comprise nearly 700 individual ministry centers, and 303 responded to the survey, for a response rate of approximately 43%.

This report is divided into 5 parts, corresponding to the sections delineated in the survey. All survey items are included in the report. Additionally, multiple survey items were combined to create indices that give a more concise picture of certain aspects of camp and retreat ministries. These indices and other survey items include written interpretation and comparison with previous years of the survey in order to observe trends.

How to use this Report:

Share survey findings with your organization's camp directors...

Discuss key survey findings with your ministry center's staff or board of directors...

Compare your site's philosophy and statistical data with the larger camping network...

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Report Highlights and Findings Summary

The below findings are not meant to be exhaustive but, rather, to highlight some of the survey findings that the researcher considered interesting or remarkable.

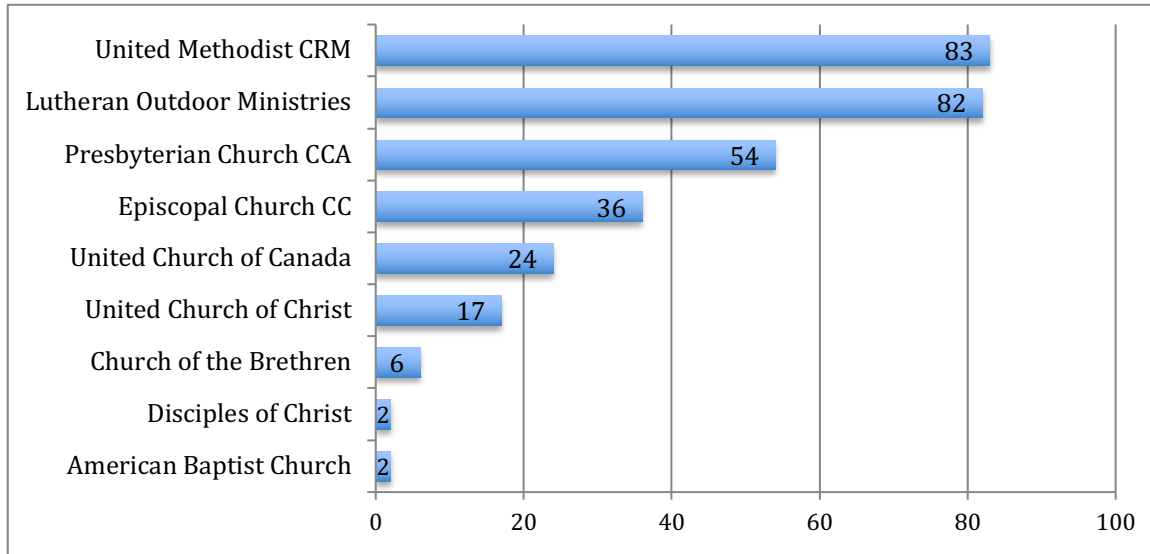
1. The 2018 survey has the **most diverse representation of Mainline camps** that have been collected in the OMC director survey, predominantly because of an increase in responses from Canada and an increase in responses from sites that are primarily conference/retreat centers (*see page 4 and page 6*).
2. There has been a gradual demographic shift among camp directors since 2014, resulting in a higher proportion of female directors and younger directors. The proportion of white male directors over the age of 40 fell below 50% for the first time, and **female directors** finally exceeded 1/3 of the camps surveyed (*page 8*).
3. The percentage of directors with **no theological education** has risen each year of the survey, exceeding 1/3 of responding directors in 2018 (*page 8*).
4. There is evidence that over time, camps and retreat centers with weak connections to their denominational bodies and constituent congregations are in danger of losing their high emphasis on faith teachings (*page 7*).
5. Registration fees for a week of camp increased to an average of **\$420 USD** in 2018.
6. **Summer camp enrollment continued to rise** in 2018 for most Mainline camps, though most also reported that they were below 75% capacity (*page 13*). The major exception was LOM ministry centers, which saw a *decrease* in camp enrollment.
7. **Retreat participation rose in 2018** for the majority of responding ministry sites (*page 17*), though two-thirds remained below 75% capacity for weekend retreats.
8. **Faith formation** remained a top priority among a large majority of responding directors. However, for the first time in this survey, *fun* was rated slightly higher in average importance than *individual faith formation* and *facilitating participants' experiences of or encounters with God* (*page 20*).
9. Two related survey items have shown **downward trends** since 2014: the importance of *facilitating participants' experiences of or encounters with God* and agreement with *our camp exists to lead young people to Christ* (*pages 19-20*). It is possible that these trends are related to an increased aversion among Mainline Christians to language that is common in American Evangelicalism, which has become increasingly associated with conservative (or Republican) politics. It is also possible that these trends are related to shifts in survey participants.
10. Two survey items related to philosophy have shown slight **upward trends** since 2014. These include agreement with *Our camp has a strong focus on nature/creation learning/stewardship* and average importance given to *Peace and justice awareness* (*pages 19-20*). Together with finding #9 above, this may show evidence for political alignment influencing camp philosophy, since both items showing upward trends have become associated with progressive (or Democratic) political policies. In other words, these observed trends may not represent actual changes in philosophy but, rather, increased emphasis in response to the USA political climate since 2016.

Part 1: General Camp Statistics:

303 unique camps responded in part or in full to the survey

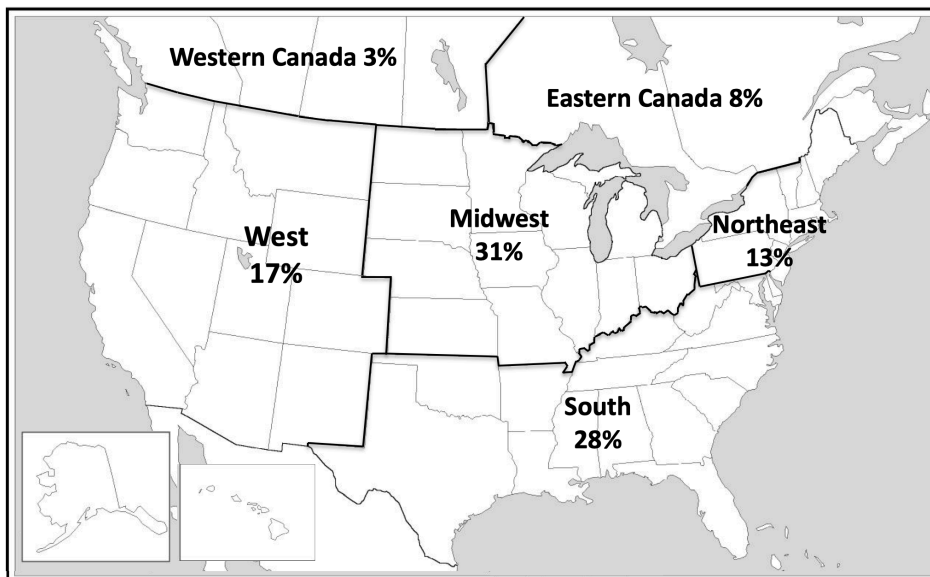
- They represented 49 states and 9 Canadian provinces

Figure 1: # Responding Camps, by Denomination



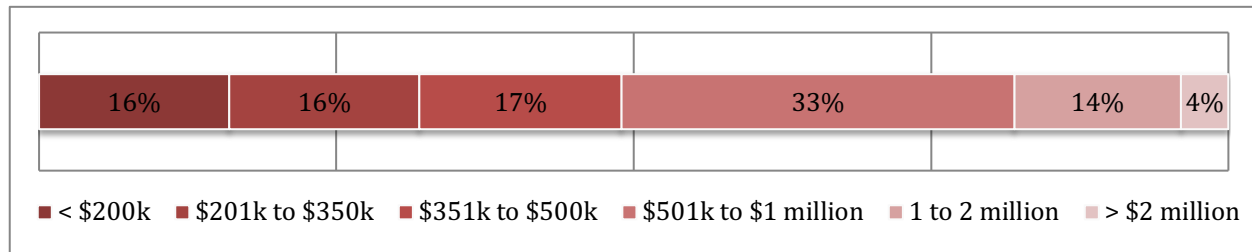
- Responses from PCCCA and LOM camps increased slightly compared with the 2016 survey. Conversely, UM-CRM and ECCC responses both decreased from 2016 (UM-CRM by more than 20%). Both of the latter organizations had leadership transitions, which may have contributed to lower response rates.
- The United Church of Canada greatly increased their response numbers, due to increased interest in the project among leadership in 2018.

Figure 2: Percentage of Responding Camps, by Region



Property Size (Acreage):

- 21% owned or leased less than 50 acres of property (or have no property)
- 18% had 50-100 acres
- 27% had 101-250 acres
- 22% had 251-500 acres
- 12% had more than 500 acres

Budget:**Figure 3: Percentage of Camps, by Annual Operating Budget**

- 16% had an annual budget of less than \$200k
- 16% \$201k – \$350k
- 17% \$351k – \$500k
- 33% \$501k – \$1 million
- 14% more than \$1 million – \$2 million
- 4% more than \$2 million

Full-time Employment:

- 11% had no full-time staff members
- 19% employed 1 full-time staff member
- 24% employed 2-3
- 19% employed 4-5
- 17% employed 6-10
- 10% employed 11 or more

Employment Summary (including full-time and part-time staff):

- 9% of these camps operated with only one paid staff person or none at all
- A third of camps had 4 or fewer paid staff people
- Another third had between 5 and 10 paid staff members
- The remaining third had more than 10 paid staff members

Accreditation:

- 52% of US camps were accredited through the American Camp Association (ACA)
- 16% were members of the Christian Camp and Conference Association (CCCA)

General Ministry Site Overview:

- 6% Primarily adult conferences and retreats
- 29% Primarily youth/child camping
- 62% Combination of youth/child and family summer camping and year-round retreats/conferences
- 3% Rental facility or primarily family camping

Evaluation Methods:

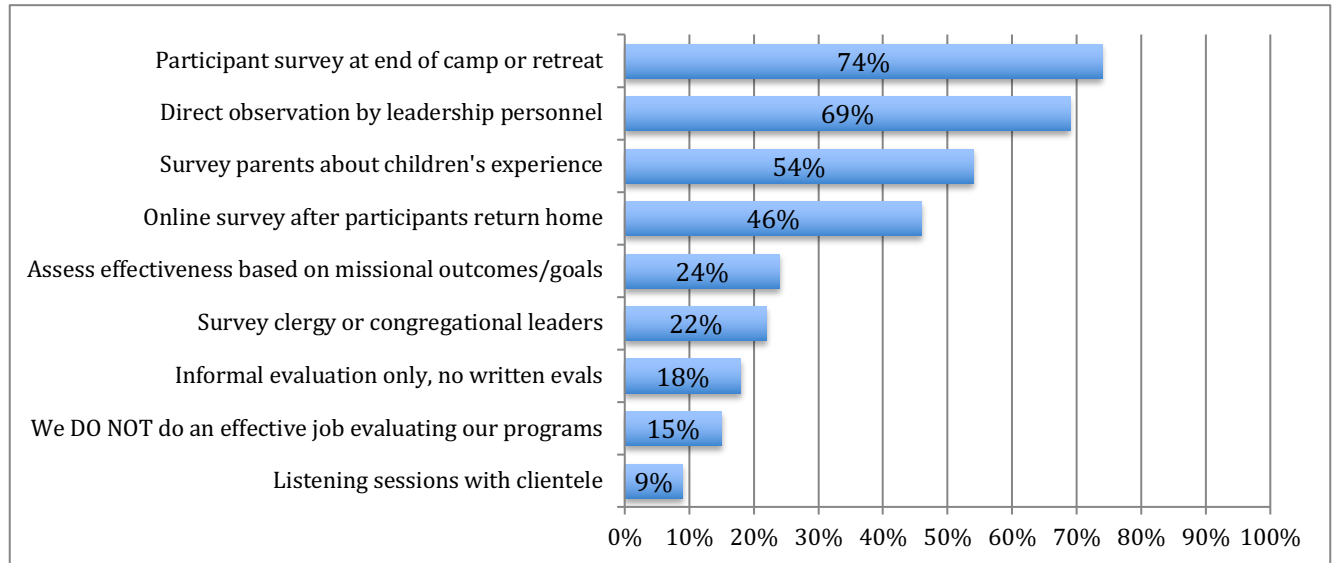


Figure 4: Evaluation Methods used by responding camps

- 61% of camps reported using 3 or more of the above formal evaluation methods
- The frequencies of these evaluation methods were essentially unchanged from the 2016 director survey

Camp Type:

Based on responses to multiple survey questions, ministry sites were categorized by their connection to congregational ministries/denominational teachings (weak connection, moderately weak, moderately strong, and strong connection) and the emphasis placed on faith/Christian practices (low, moderately high, very high). Combining these two categories reveals four general types of mainline Protestant outdoor ministries:

Type 1: Low faith emphasis, weak connection to congregations/denom. ministries

Type 2: Moderate faith emphasis, moderate connection to congregations/denom.

Type 3: High faith emphasis, weak connection to congregations/denominations

Type 4: High faith emphasis, strong connection to congregations/denominations

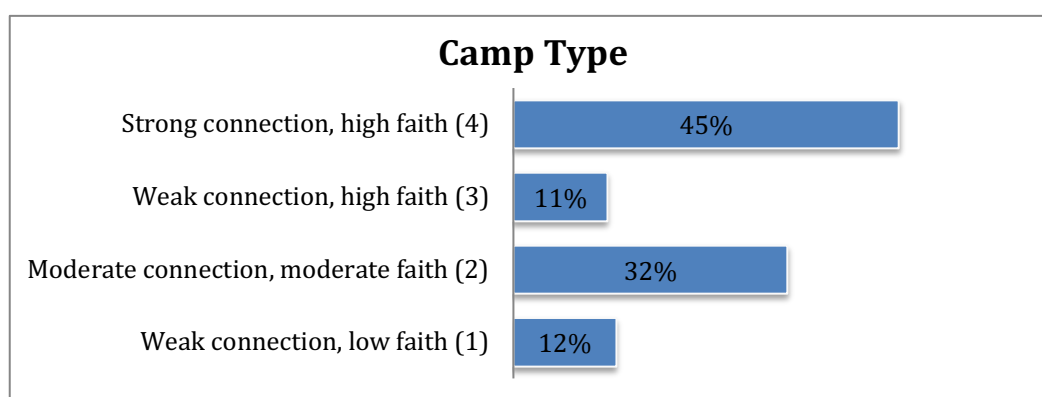


Figure 5: Prevalence of Camp Type

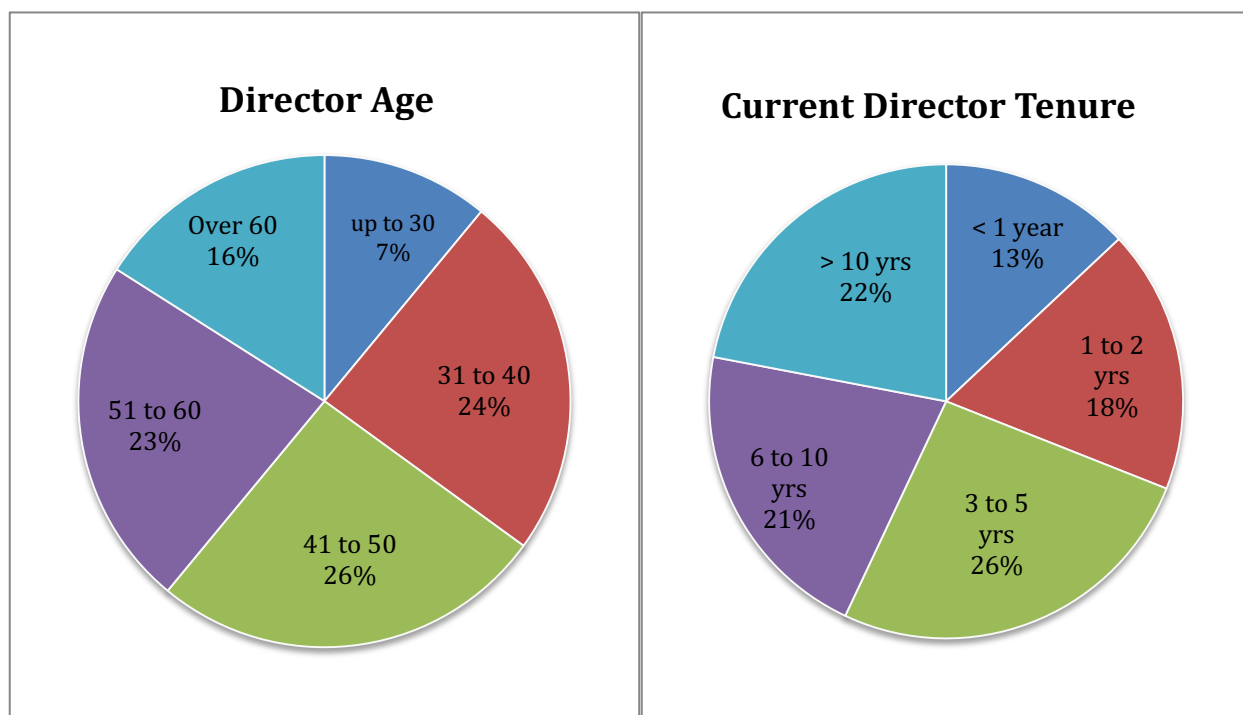
Since the OMC survey began in 2014, there is a clear trend towards lower faith emphasis among camps that have weak or moderately weak connections to their congregations and denominational bodies.

- The percentage of camps that have a strong connection to congregational ministries and high faith (Type 4 Camps) has remained steady between 42% and 45% of camps surveyed.
- The % of camps comprising Type 1 and Type 2 camps have grown steadily each round of survey administration. The combined percentage of these two camp types grew from under 30% in 2014 to 33% in 2016, and then jumped to 44% in 2018.
- The growth in Type 1 and 2 camps was at the expense of Type 3 camps, suggesting that ministry centers with a weak connection to congregational ministries and denominational teachings are at risk of losing their high faith emphasis over time.
- In 2014, Type 3 camps were second in prevalence to Type 4 camps. They slipped behind Type 2 camps in 2016, and in 2018 were the least prevalent among the camps surveyed.
- Most prominent camp type by region: **Northeast:** Type 2, **Midwest:** Type 4, **South:** Type 4, **West:** Type 4, **Canada:** Type 1.

Part 2: Camp Directors

- 98% were white
- 65% were male
 - The proportion of male camp directors fell below 2/3 for the first time in 2018. The proportion has declined slightly each year of the survey, down from 74% in 2014 and 68% in 2016.
- Education: 49% bachelor's degree, 41% master's degree or higher
- 34% had received **no formal theological education**
 - This percentage has risen each time the survey was conducted (27% in 2014 and 32% in 2016).
- 18% had a Masters of Divinity degree (unchanged from 2016)

Figure 6: Director Age and Tenure



- Data from 2018 shows a decrease in director age since the survey began in 2014.
- The data also show a decrease in director tenure. In 2014, over half had been in their current position for more than 5 years, but that proportion dropped to 49% in 2016 and 43% in 2018.
- 45% of ministry site directors were white males over the age of 40. This is the first time that this number has been under 50% in the OMC survey.
- In short, there has been a high degree of turnover among directors in recent years, resulting in a gradual demographic shift.

Part 3: Summer Camp

Overall summer program summary:

- 58% had primarily co-ed residential summer camp for children/youth
- 5% were primarily day-camp, family camp, or other specialty camp
- 4% were primarily **retreat** centers during the summer
- 33% ran a combination of traditional summer camp and retreats or other programs
- A small number of ministry centers (less than 1%) indicated that they primarily host user groups during the summer

Session Lengths Offered (of 272 centers offering summer camp programs):

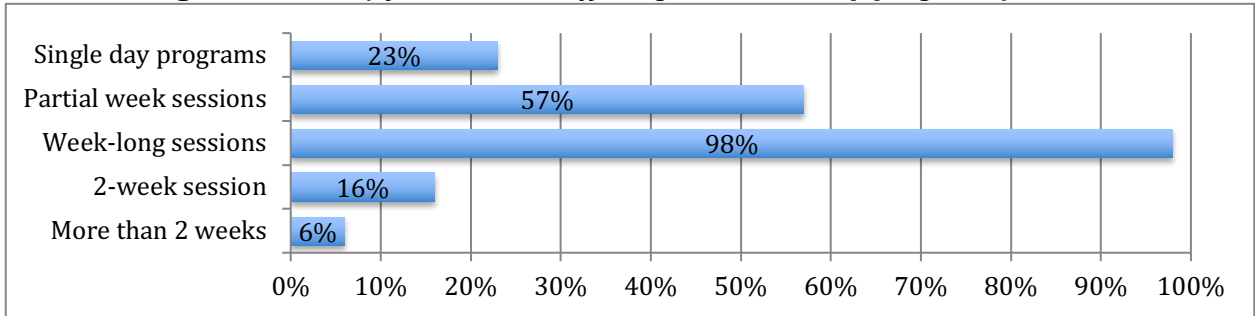


Figure 7: Summer Session Lengths Offered

Weeks of Summer Programming:

For ministry centers that offered summer camp programs, two-thirds offered between 7 and 10 weeks of programming (8 weeks was the most common). About a quarter (28%) offered 6 or fewer weeks of programming, and only 5% offered more than 10 weeks.

Summer camp programs:

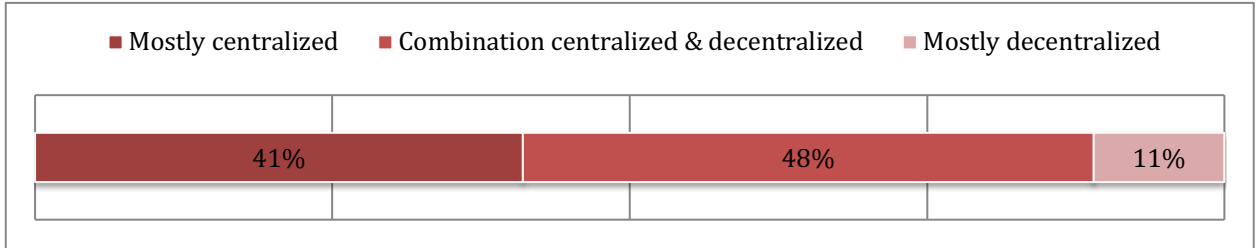


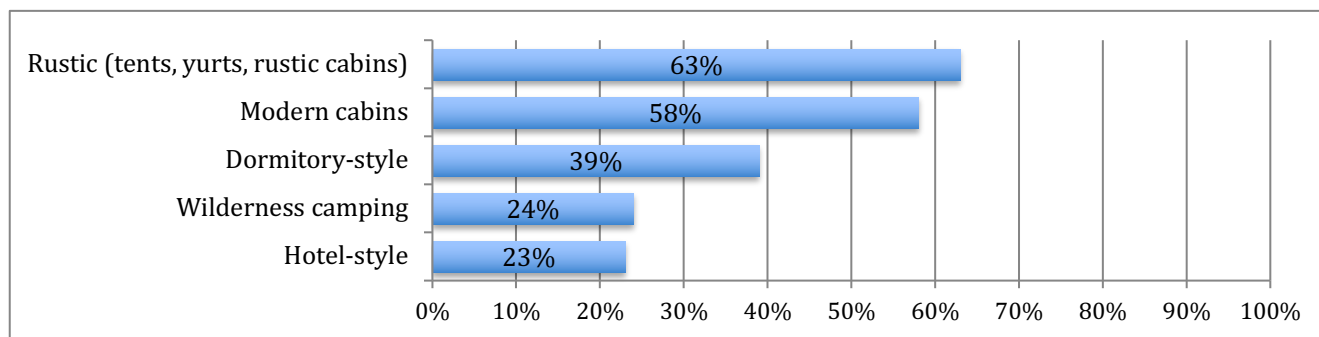
Figure 8: Centralized v. Decentralized Programming

Average weekly camp fee: \$420 (up from \$405 in 2016 and \$383 in 2014)

- Over half of camps reported weekly fees between \$350 and \$475

Northeast	Midwest	South	West	Canada
\$441	\$406	\$456	\$415	\$364 CAD

Figure 9: Summer Housing Accommodations Offered (of 279 centers providing information)



Traveling Day Camp:

Some camps offered Traveling Day Camp programs, in which teams of staff members travel offsite to run day camp at a congregation or other setting. A total of 86 camps offered these programs, and well over half of these were Lutheran (LOM) camps. Very few of the non-LOM camps offering traveling day camp ran more than 5 sites, while LOM camps averaged 14 day camp sites in summer 2018.

Family Camp:

Over half of responding camps offered family camp programs during the summer. The number of family campers served varied widely, though half served fewer than 50 campers. Another quarter of camps served between 50 and 100 campers, and the remaining quarter served more than 100, including several camps serving more than 500 family campers.

Which of the following specialty programs does your camp offer during the summer? (Of 276 camps offering summer camp programs)

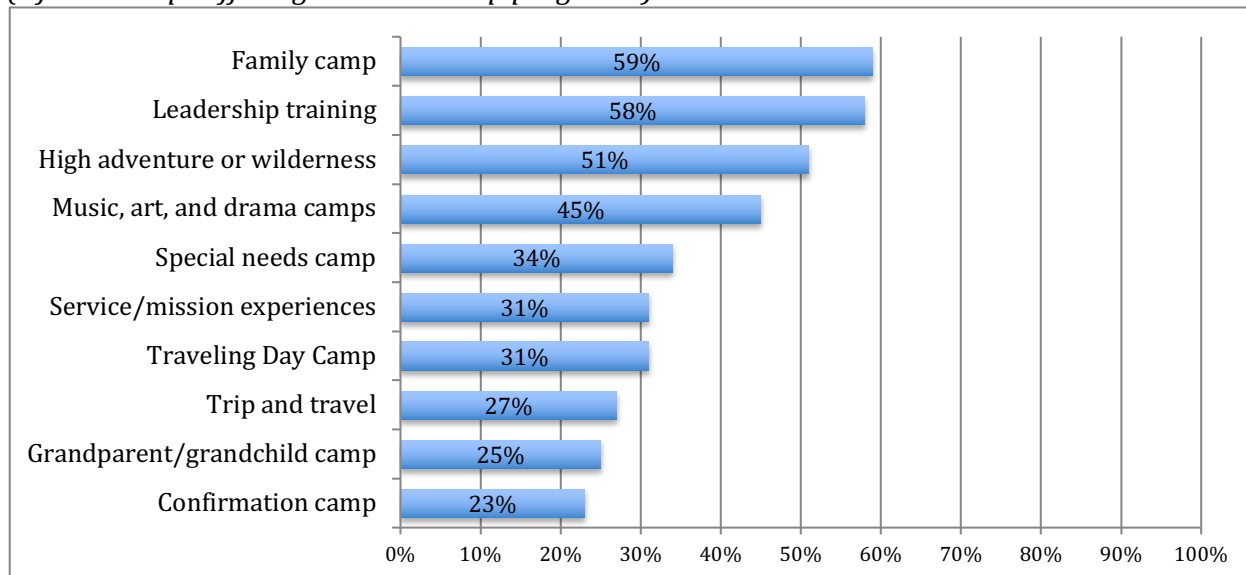


Figure 10: % of Camps offering Specialty Summer Camp Programs

Which of the following activities are regularly offered during your summer season?
(Of 276 camps offering summer camp programs)

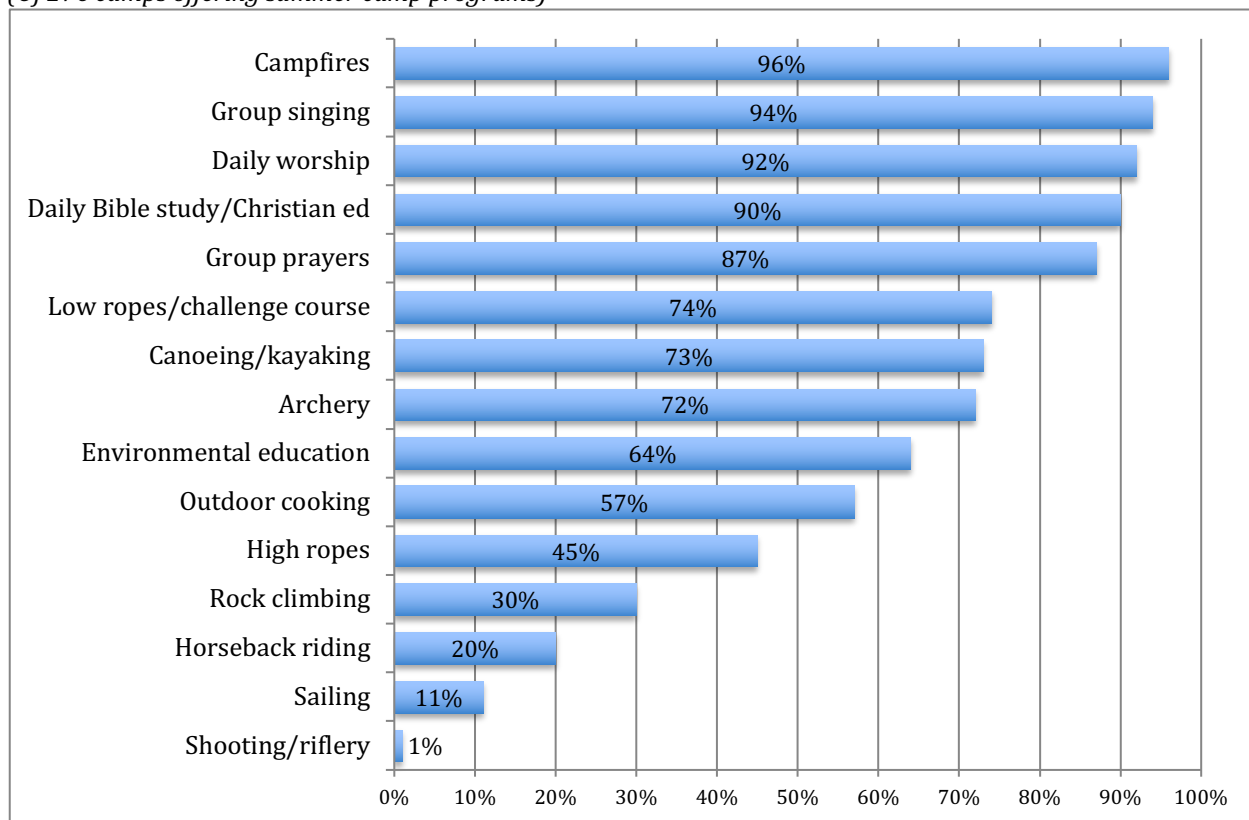


Figure 11: % of Camps offering Summer Program Specifics

Financial Assistance:

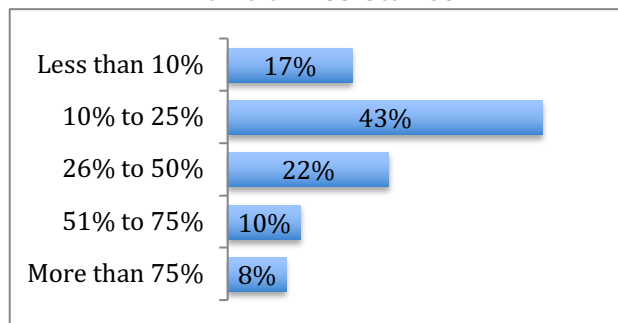


Figure 12: % of Campers Receiving Financial Assistance

Camper Diversity:

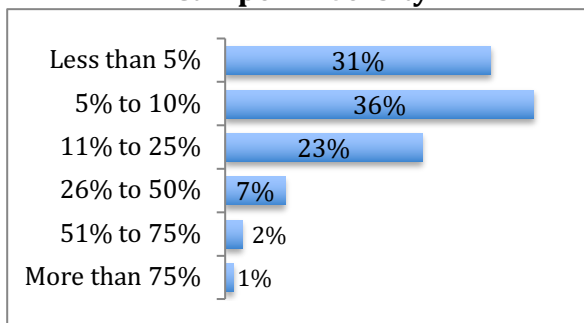


Figure 13: % of Campers representing Racial Minorities

Table 1: Percentage of Camps, by Denomination, using Bible Study Curricula

	Inside Out (C.P.)	LOM Curriculum	Wrote our own	Non-traditional
ECCC	10%	3%	45%	42%
LOM	4%	65%	27%	4%
PCCCA	62%	9%	29%	0%
UMC-CRM	49%	9%	30%	12%
OMA-UCC	40%	6%	27%	27%
UC-Canada	5%	0%	52%	43%
ALL CAMPS	29%	23%	33%	15%

Level of Involvement among Congregational Leaders/Clergy

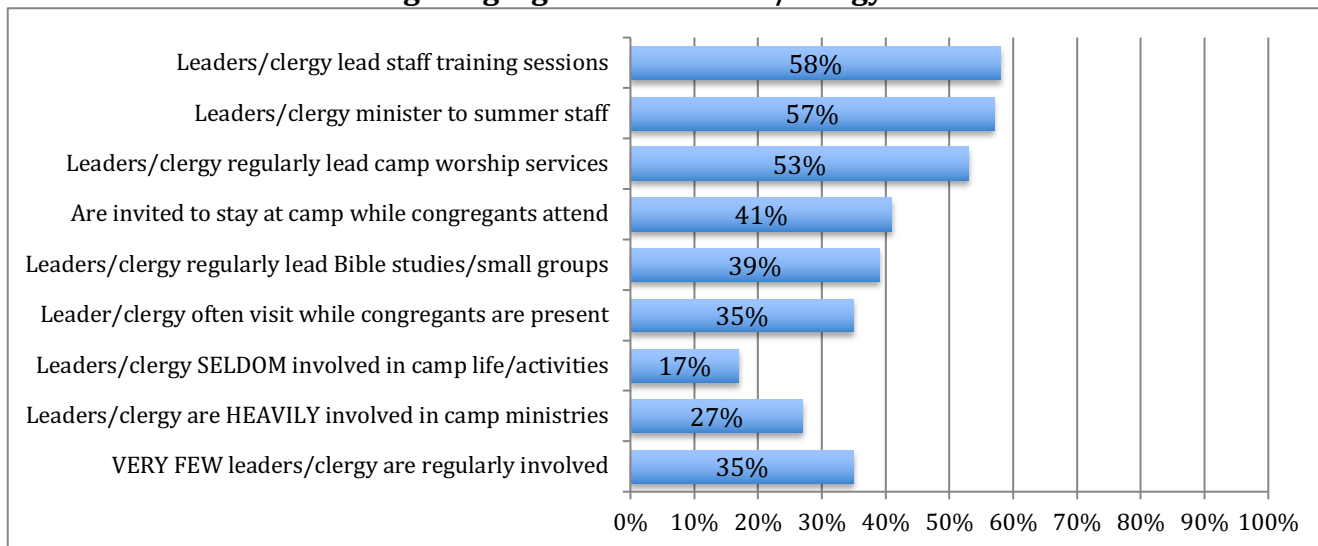


Figure 14: % of Camps Indicating Various Ways Clergy Members were Involved

- Combining the above survey items reveals that 22% of responding camps have a very low level of clergy engagement, 20% have moderate engagement, and 58% have high or very high levels of clergy engagement.

Denominational Affiliation among Summer Campers:

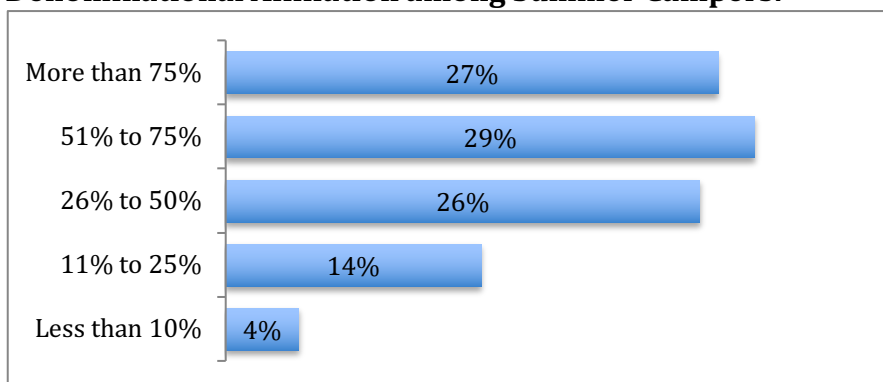


Figure 15: % of Campers Affiliated with Constituent Denomination/Congregations

Table 2: % of Campers Affiliated with Constituent Denomination, by Camp Type

	Type 1 Camps	Type 2 Camps	Type 3 Camps	Type 4 Camps
25% or under	54%	10%	28%	14%
26% to 50%	35%	31%	28%	20%
More than 50%	11%	59%	44%	66%

Summer Camp Enrollment and Capacity

Summer Camp Capacity:

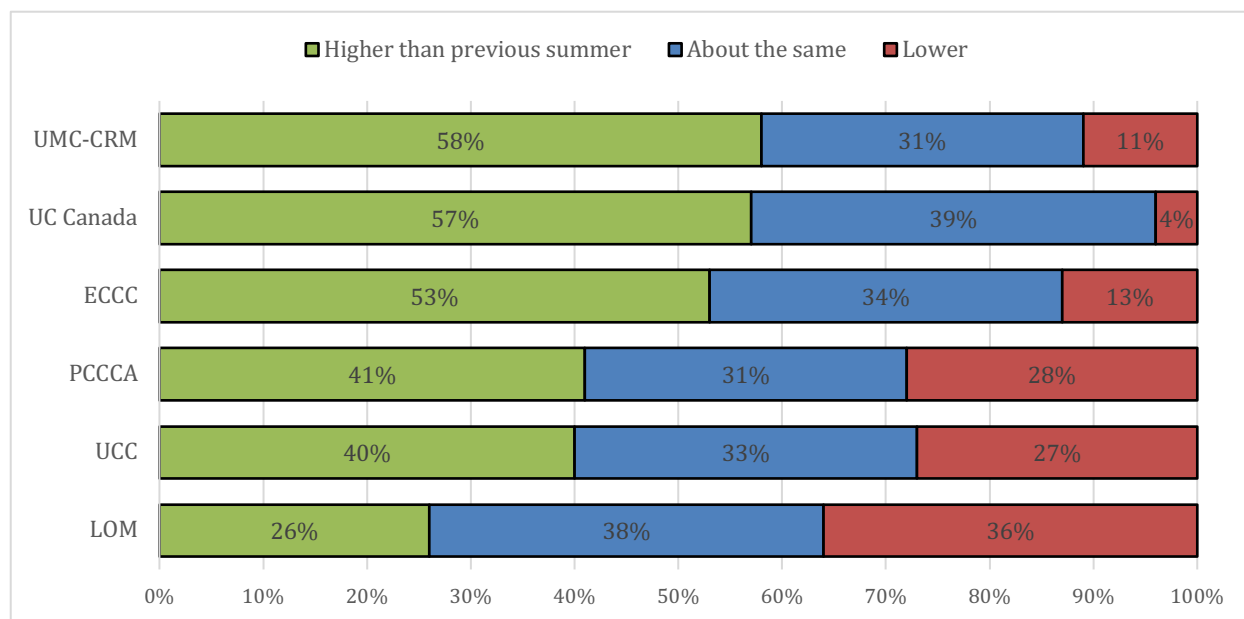
A third of camps had a capacity of 100 or fewer campers. Another third had a capacity of 101-175, and the remaining third over 175 campers at once. 10% of camps had a capacity of 300 or more.

Table 3: Summer Camp Enrollment:

	2014	2016	2018
90% capacity or higher	14%	13%	15%
75% to 89% capacity	44%	32%	31%
Less than 75% capacity	41%	55%	54%
Enrollment higher than previous summer	45%	45%	44%
Enrollment about the same as previous	33%	39%	35%
Enrollment lower than previous summer	22%	16%	21%*
Highest of past 5 summers	-	25%	27%
Higher than most of past 5 summers	-	21%	21%
About the same as past 5 summers	-	34%	30%
Lower than most of past 5 summers	-	13%	17%
Lowest of past 5 summers	-	6%	5%

*A large portion of Lutheran camps had lower enrollment in 2018 compared to 2017, causing this figure to appear higher in the aggregate. Excluding Lutheran camps, 51% of other OMC camps noted higher enrollment, 33% about the same, and only 16% lower than 2017.

Figure 16: Camper Enrollment Compared to Previous Summer, by Denomination



- Figure 16 above offers important details to the data shown in Table 1. While most camping organizations showed positive enrollment trends in 2018, LOM organizations showed *negative* trends, which affected the OMC results as a whole.

Considering all non-LOM camps, 51% had higher camper enrollment than 2017, with another 33% reporting “about the same.” This shows a *positive* trend since 2016.

- One potential factor in the decline in LOM camp enrollment was the triennial ELCA national youth gathering, which took place in July 2018. Many LOM camps report that this gathering negatively affects their camper enrollment every three years.
- Additionally, a third (32%) of non-LOM camps reported having the highest camper enrollment of the past 5 years. Only 13% of LOM camps reported the same.

Overnight Camp Attendance:

Summer camp attendance numbers were collected from 260 camps. Most had small attendance numbers. A quarter of all camps had 215 or fewer overnight campers, another quarter had between 216 and 400, another quarter between 401 and 760, and the last quarter over 760. Only 15% of camps had 1000 or more overnight campers in summer 2018. The average number of overnight campers was 592 (down from 650 in 2016 survey). Camper age was split fairly evenly between elementary age campers and junior/senior high campers, with slightly more junior/senior high campers. A substantial portion of camps (79) also indicated serving adult campers during the summer, with 75% serving fewer than 100.

On Site Day Camp Attendance:

Day Camp attendance numbers were collected from 120 camps. Some of these were single day programs, while others were week-long day camp programs. Most had very low attendance numbers. A quarter had 40 or fewer day campers, and fully half had fewer than 100. A quarter had 100-250, and the remaining quarter had more than 250. More than 85% of day camp participants were under the age of 12 (elementary age).

Camper Days:

Camper days is an industry standard for summer camp enrollment typically defined as an overnight and 3 meals. Surprisingly, 68% of responding camps said that they do not keep track of this number. Half of camps that provided a number had 2400 or fewer camper days in 2018. Another quarter had between 2400 and 4300, and a quarter had more than 4300.

Summer Staff:

Most of the responding camps employed seasonal staff members for the summer months. Most had paid summer staff members, though many relied predominantly on volunteer staff. A third of responding camps (34%) had more volunteer staff than paid staff during the summer months. In terms of *paid summer staff*, a quarter had fewer than 12, a quarter had 12-21, and the remaining half had over 21. Only 11% had more than 50 paid summer staff. The average number of paid staff members was 28, equivalent to 2016 figures.

Average weekly summer staff salary: \$243 USD (*was \$229 in 2016 and \$223 in 2014*)

- Over half of camps reported weekly staff salaries between \$200 and \$250

Northeast	Midwest	South	West	Canada
\$225	\$243	\$224	\$292	\$330 CAD

Staff training:

Paid staff members generally received extensive training at these camps. The average length of staff training in 2018 was 10 days (*same as 2016*), with over half of all camps (54%) having between 10 and 14 days. Very few camps (10%) offered 3 days or fewer, and just over a quarter (27%) offered between 4 and 9 days of training.

Training for volunteer staff was much less consistent, with almost 20% offering no training. Some of these directors explained that volunteer staff had been on staff previously or had completed a counselor in training program in a previous year. Only 25% offered 3 or more days of training, with the other 55% offering 1-2 days.

Returning Summer Staff:

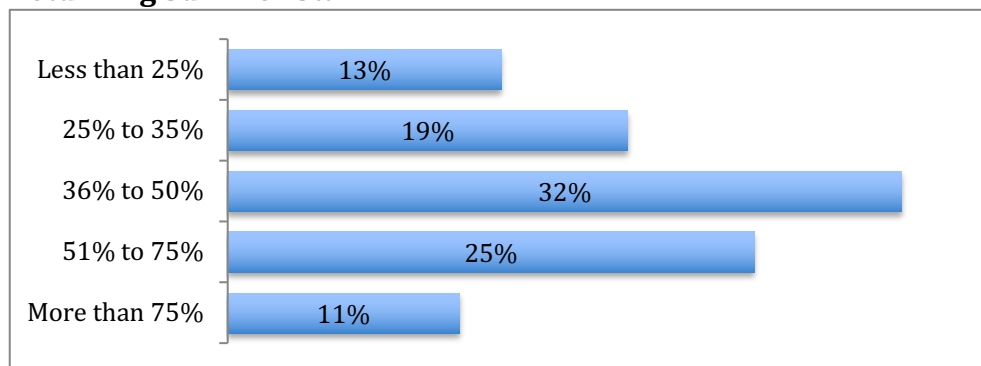


Figure 17: % of Camps Reporting Various Levels of Staff Returning from Previous Summers

Part 4: Retreats and Conferences

Primary clientele for retreats/conferences:

- 21% Primarily **adults**
- 8% Primarily **youth/children**
- 71% Mix of children, youth, adults, and families

Retreat Accommodations Offered:

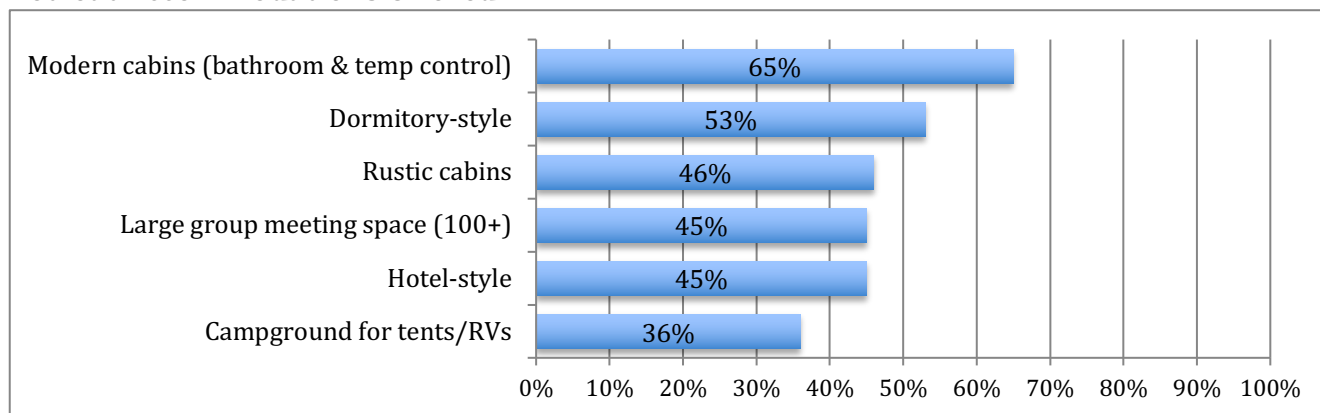


Figure 18: % of Camps Offering Selected Housing Accommodations for Retreat Participants

- Well over half of responding camps (60%) offered 3 or more of the above options

Seasonal Retreat Staff:

Ministry centers varied in their reliance on seasonal staff to help during the retreat season. Many sites (43%) did not employ any seasonal staff for retreats. A quarter employed between 1 and 3 staff, 21% employed 4-10, and just over 10% employed more than 10.

Denominational Affiliation among Retreat Participants:

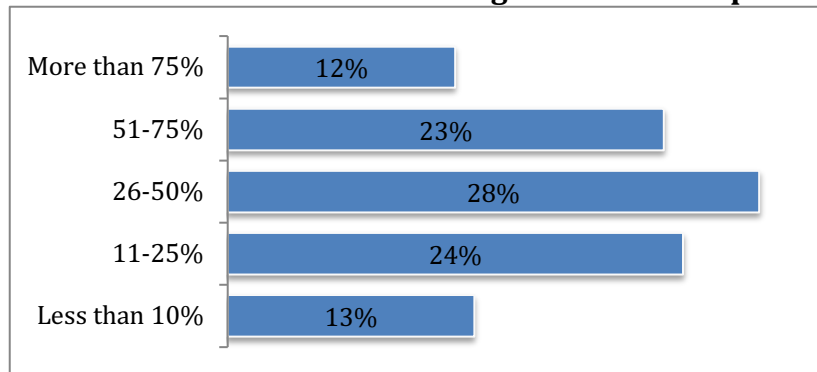


Figure 19: % of Camps Indicating Retreat Participants Affiliated with Constituent Denomination/Congregations

Table 4: % of Retreat Guests Affiliated with Constituent Denomination, by Camp Type

	Type 1 Camps	Type 2 Camps	Type 3 Camps	Type 4 Camps
Under 10%	39%	7%	23%	8%
10% to 25%	11%	31%	35%	21%
26% to 50%	32%	33%	23%	25%
More than 50%	18%	29%	19%	46%

Retreat Usage:

Ministry centers varied considerably in how they tracked retreat usage. Many camps were not able to provide the number of individuals they served because they only track usage by number of groups. Others could approximate the number of guests served. Very few used the industry standard of guest days to track retreat usage.

Overnight capacity for retreats/conferences (out of 251):

A quarter of ministry centers indicated that their overnight retreat capacity was fewer than 85 guests. Another quarter reported a capacity between 85 and 130 guests. Another quarter could accommodate between 130 and 199. The remaining quarter could accommodate more than 200 guests overnight.

Retreat Guests in most recent retreat season:

A quarter of ministry centers reported hosting fewer than 500 overnight retreat guests. Another quarter reported between 500 and 2000, another quarter 2010 to 4000, and the final quarter over 4000 overnight guests, with 10% reporting 8000 or more. Fewer than half of all camps (137) reported the number of overnight retreat guests.

About a third of camps tracked the number of day only retreat guests that they served. Of these, a quarter served fewer than 150, another quarter served between 150 and 400, the third quarter served between 400 and 1400, and the last quarter served more than 1500.

Guest days is an industry standard for retreat enrollment typically defined as an overnight and 3 meals. Similar to previous years, a large majority (68%) of camp directors indicated that they do not keep track of this number. Of those that responded, a quarter had fewer than 1500 guest days in the most recent retreat season. Another quarter had 1500 to 3250, another quarter had 3300 to 6950, and the remaining quarter had over 7000 guest days.

Table 5: Retreat/Conference Usage (out of 255)

	2014	2016	2018
90% capacity or higher (weekends)	-	5%	11%
75% to 89% capacity (weekends)	-	20%	23%
50% to 74% capacity (weekends)	-	36%	34%
Less than 50% capacity (weekends)	-	39%	32%
90% capacity or higher (weekdays)	-	-	2%
75% to 89% capacity (weekdays)	-	-	7%
50% to 74% capacity (weekdays)	-	-	11%
Less than 50% capacity (weekdays)	-	-	81%
Usage higher than previous year	-	44%	46%
Usage about the same as previous	-	39%	38%
Usage lower than previous year	-	17%	16%
Highest of past 5 years	-	19%	19%
Higher than most of past 5 years	-	29%	31%
About the same as past 5 years	-	38%	37%
Lower than most of past 5 years	-	12%	11%
Lowest of past 5 years	-	2%	2%

Which of the following retreat/conference programs does your camp operate regularly? (out of 272 sites that offer retreats)

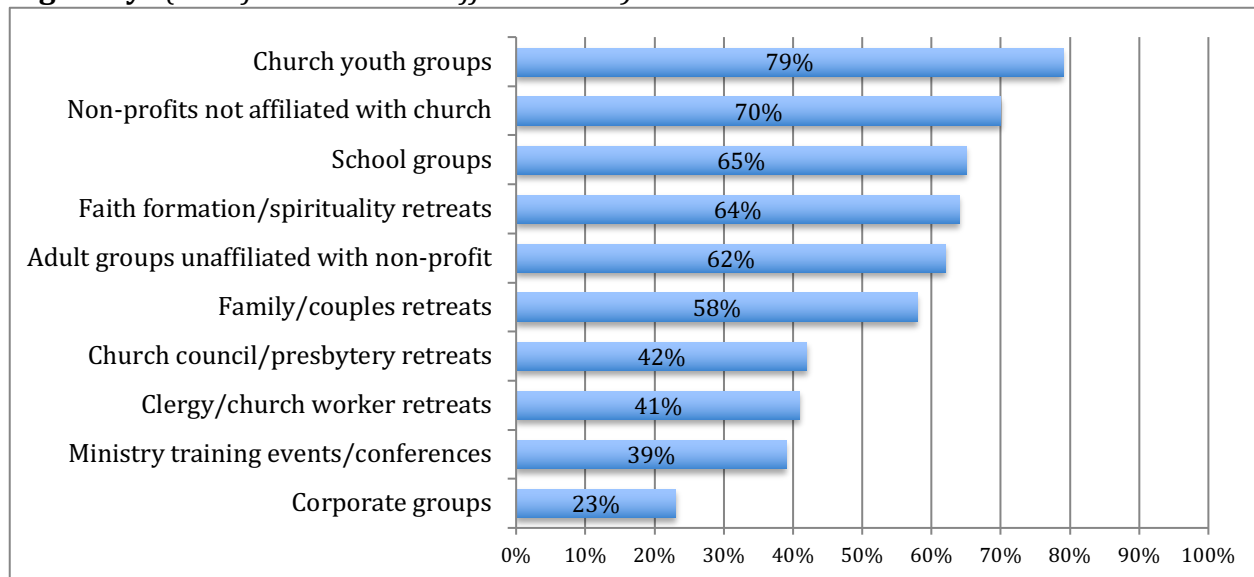


Figure 20: % Sites serving Selected Retreat Clientele

Which of the following programs and activities does your center offer to retreat and conference guests?

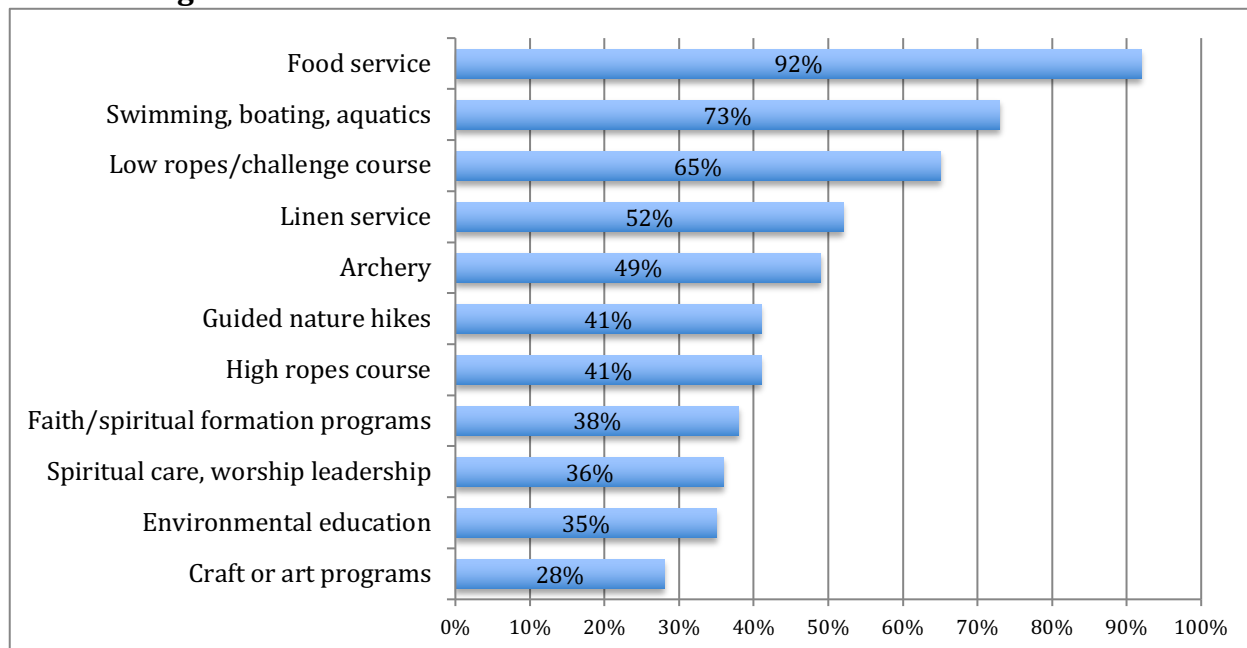
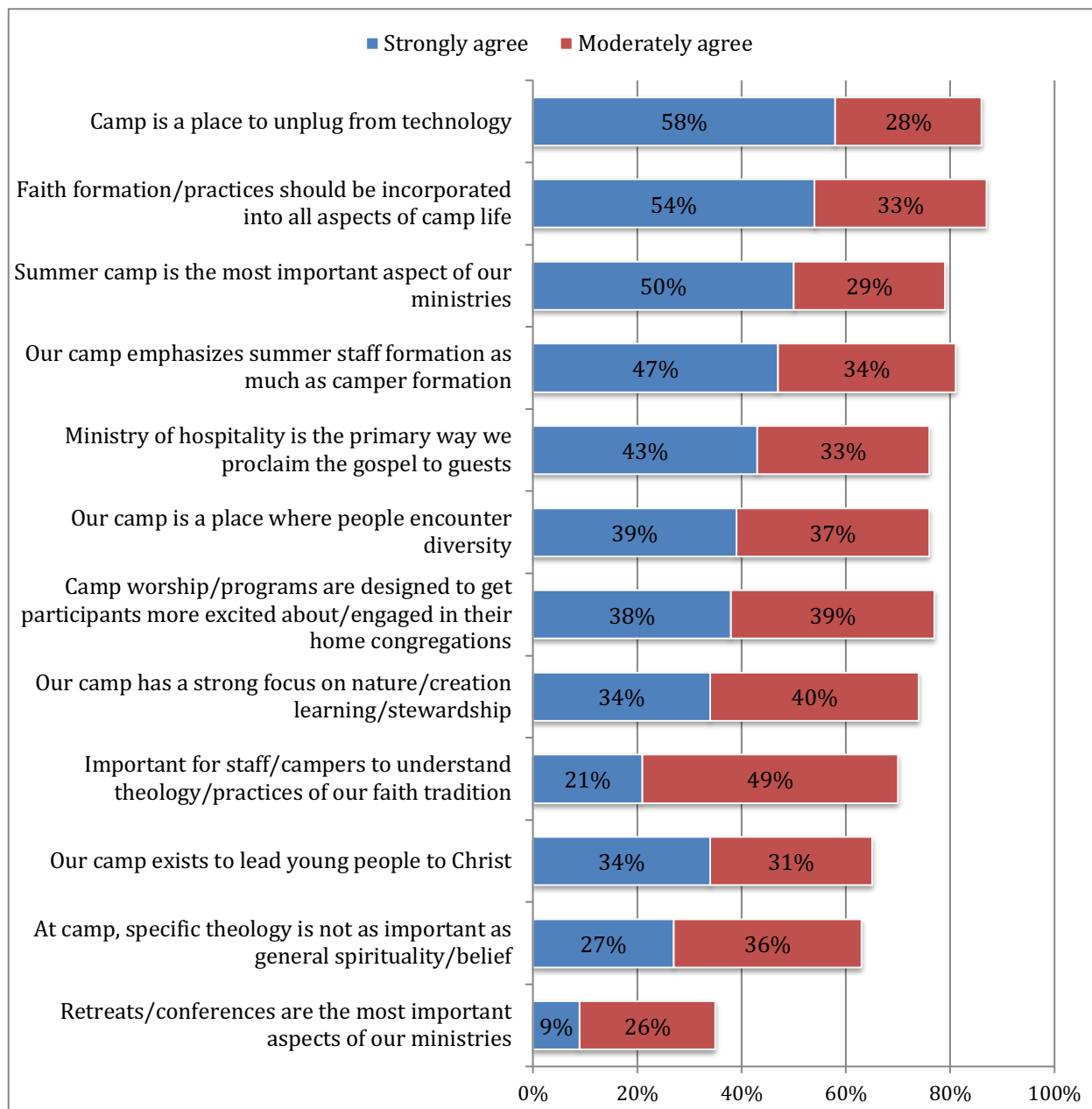


Figure 21: % Camps offering Selected Retreat Programs

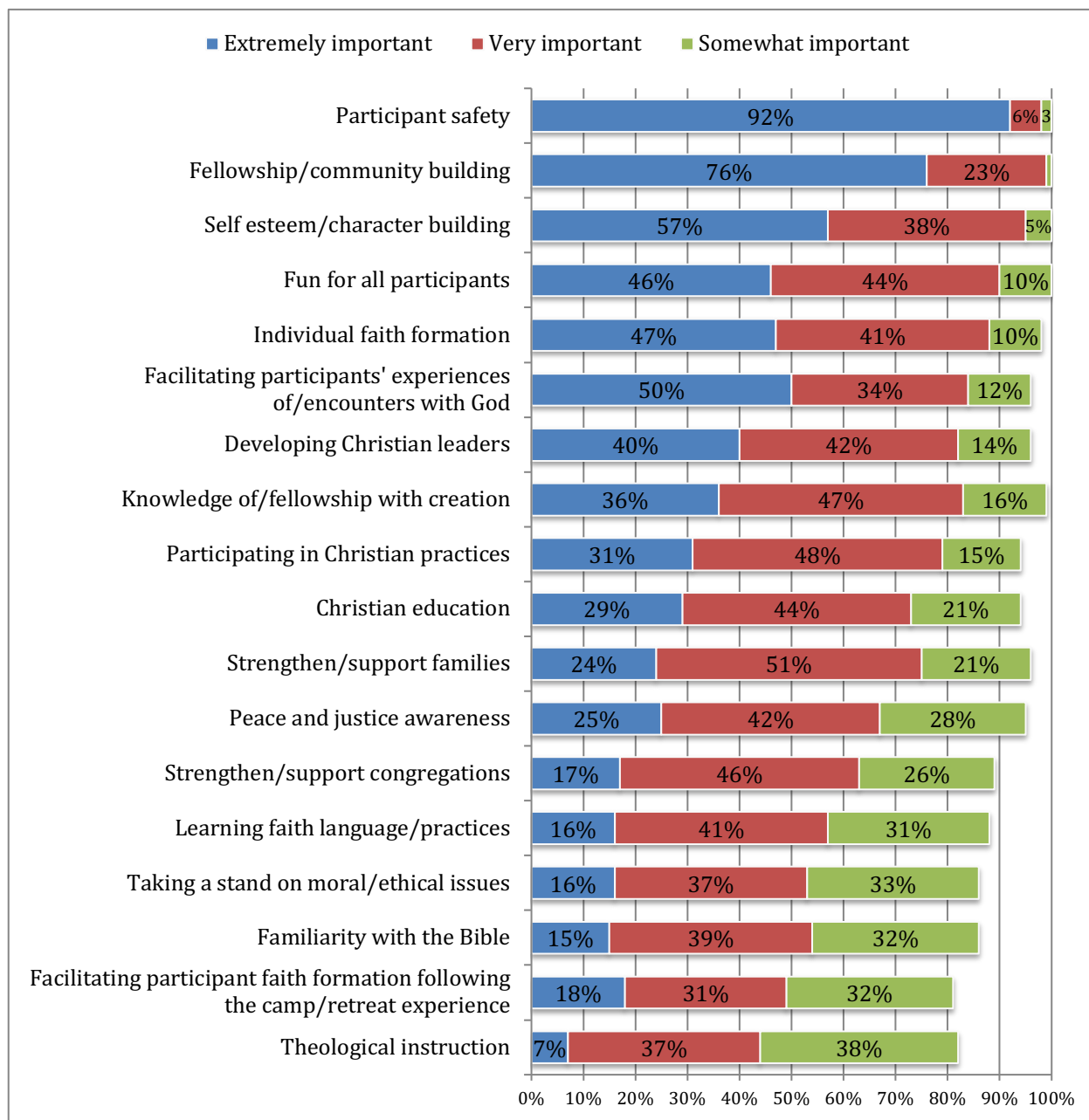
Part 5: Camp and Retreat Center Philosophy

Figure 22: Level of Agreement with Philosophy Statements about Ministry Site (270 respondents)



- Most items in Figure 23 have remained statistically unchanged since the survey began in 2014.
- One survey item has shown evidence for a downward trend over the course of the 3 surveys: “Our camp exists to lead young people to Christ.” In 2014, 76% of directors agreed with this statement, compared with 71% in 2016 and 65% in 2018.
- “Our camp has a strong focus on nature/creation learning/stewardship” has shown a modest upward trend in agreement level, from 67% in 2014 to 74% in 2018.

Figure 23: Level of Importance Assigned to Selected Program Priorities (269 respondents)



- It is notable that this was the first OMC survey in which “fun for all participants” was rated as more important, on average, than “individual faith formation” and “facilitating participants’ experiences of or encounters with God.”
- For LOM, PCCCA, and UMC-CRM camps, fun remained ranked lower than faith formation and facilitating experiences of God, as in previous years of the survey.
- The importance given to “facilitating participants’ experiences of or encounters with God” is the only above item showing a downward trend across surveys. In 2014, 64% of directors indicated this was extremely important, compared with 55% in 2016 and 50% in 2018.
- Importance assigned to “Peace and justice awareness” has shown a modest upward trend.