



Outdoor Ministries Connection
2020 Director Survey



LOM Supplemental Data Report

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About this Report:

This report is designed as a supplement to the 2020 OMC Director Report, which summarizes data from 321 respondents representing 376 outdoor ministry sites across six outdoor ministry associations affiliated with Outdoor Ministries Connection (OMC). Partnering associations included 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, and United Church of Canada Outdoor Ministries. For complete results and more thorough data analysis, see the full report, which had a 91% completion rate and a 54% response rate.

This report supplement presents data specific to ministry centers affiliated with Lutheran Outdoor Ministries (LOM). These data are at times compared with the other OMC ministries that responded and other times compared with past data from LOM respondents.

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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HIGHLIGHTS

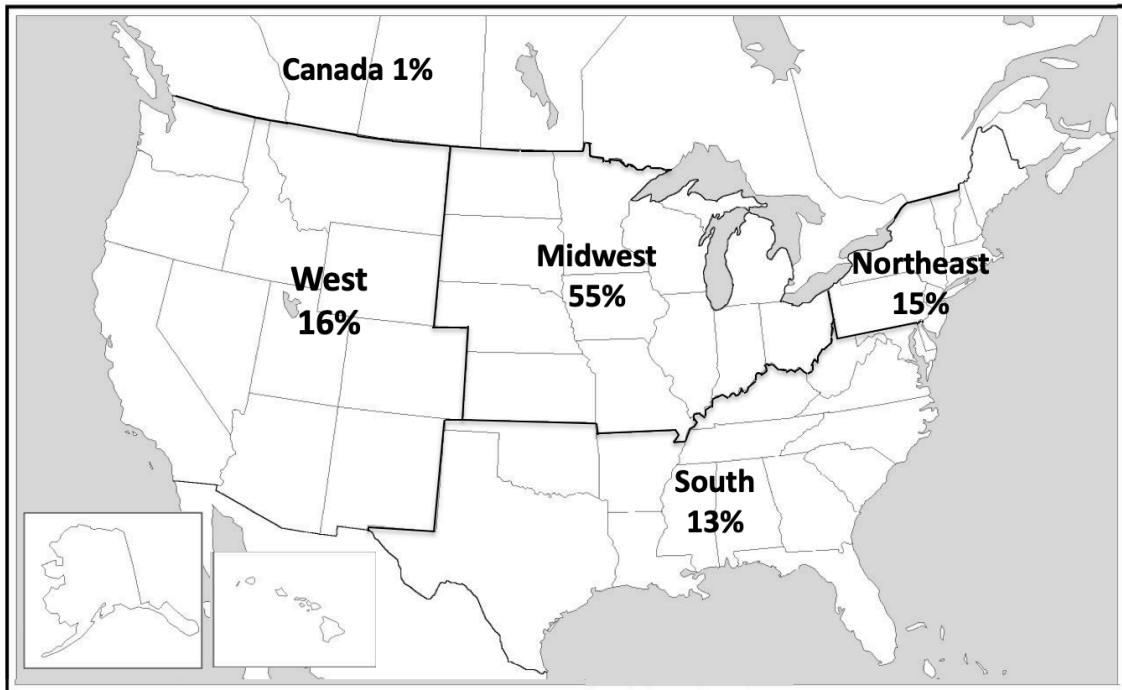
1. LOM outdoor ministry directors remain highly committed to faith formation and continued connection to partnership ministries.
2. The COVID-19 pandemic had dramatic effects on all aspects of outdoor ministries. There was less mobility among camp directors, widespread cuts of staff, and a 91% reduction in overnight summer camper numbers across the network. More than 90% of organizations hosted their fewest retreat guests in at least 5 years. LOM organizations had a total of over \$40 million in lost revenue. However, over three-quarters of organizations reported increased fundraising revenue.
3. There was widespread hope, in spite of the dire numbers. Nine out of ten directors said they were very or extremely confident that their organization would be around in two years, and 86% were hoping to operate normal summer programs in 2021, most at reduced capacity.

Part 1: General Camp Statistics:

73 responses represented **106 unique ministry sites** affiliated with LOM

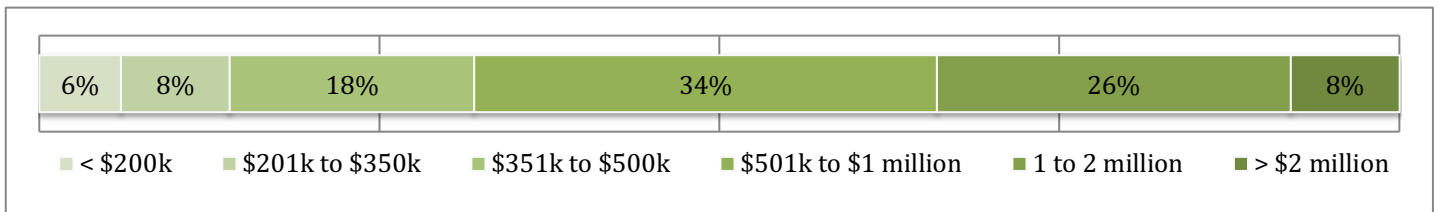
- These responses represent an **82% response rate**
- 70 of these ministry organizations (96%) were affiliated with the ELCA
- Other Lutheran denominations represented included LCMS (7%), LCMC (4%), NALC, and Evangelical Lutheran Church in Canada (11% indicated affiliation with multiple denominations)
- Responding sites represented 30 US states and 1 Canadian province
- 96% of respondents were camp directors, with the remainder other camp leadership

Figure 1: LOM Respondents, by Region, n=73



Budget:

Figure 2: Percentage of Outdoor Ministries, by Annual Operating Budget, n=73



General Ministry Overview:

- 70% Combination of youth/child summer camping and year-round retreats/conferences
- 22% Primarily youth/child camping
- 5% Primarily user groups and rentals
- 3% Primarily adult conferences and retreats

Property Size (Acreage):

- 12% owned or leased less than 50 acres of property (or had no property)
- 20% had 50-100 acres
- 25% had 101-250 acres
- 22% had 251-500 acres
- 21% had more than 500 acres

Full-time, year-round Employment (prior to the pandemic):

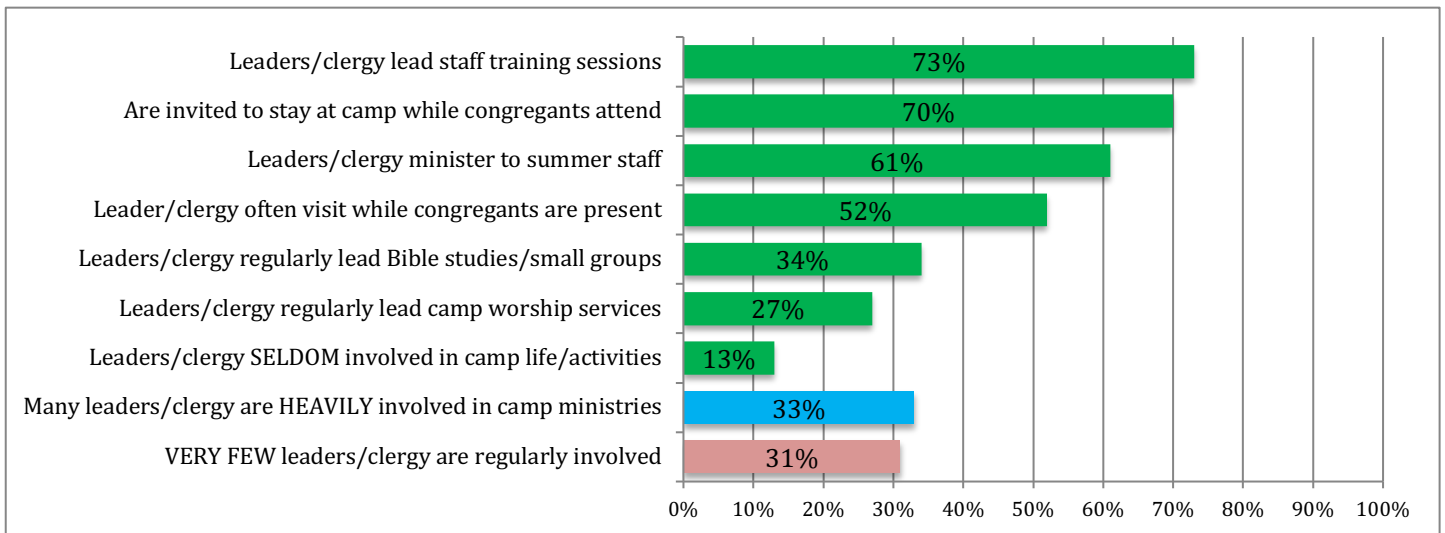
- 6% had no full-time staff members
- 11% employed 1 full-time staff member
- 23% employed 2-3
- 24% employed 4-5
- 19% employed 6-10
- 17% employed 11 or more

Employment Summary (full-time and part-time year-round staff):

- A quarter of these ministries operated with 5 or fewer paid staff members
- Another quarter had 6-8 staff
- Another quarter had 9-15
- The final quarter operated with more than 15 paid staff members

Accreditation: 58% were accredited through the American Camp Association (ACA)
 15% were members of Christian Camp and Conference Association (CCCA)

Figure 3: % of Camps Indicating Various Ways Clergy Members were Involved, n=64



- Combining the above survey items suggests that 19% of responding ministry centers had a low level of clergy engagement, 28% had moderate engagement, and 53% had high or very high levels of clergy engagement.

Outdoor Ministry Type:

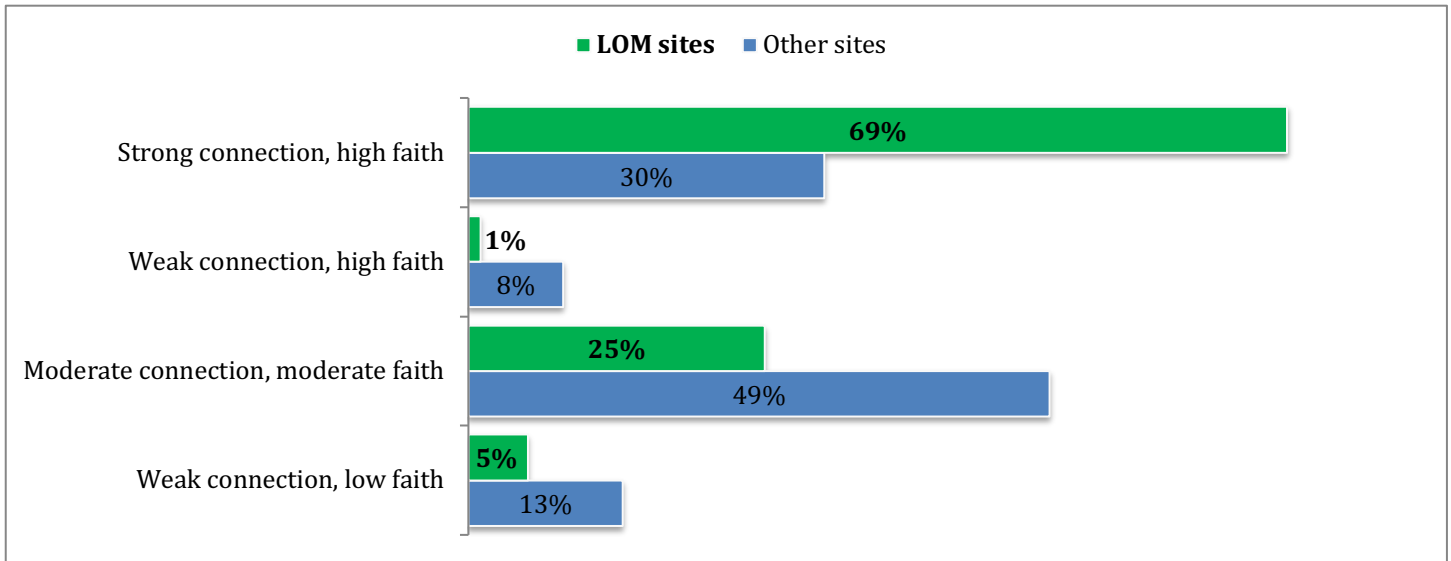
Type 1: Low faith emphasis, weak connection to congregations/denom. ministries

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 4: Prevalence of Outdoor Ministry Type, n=73



- The very high prevalence of Type 4 outdoor ministries among LOM organizations continued in 2020. This ministry type, featuring strong connections with congregational ministries and high faith emphasis, has been consistently highest among LOM organizations since the survey began in 2014.

Camp and Retreat Center Directors

- **97%** were white, **76%** were male
- Education: 58% bachelor's degree, 36% master's degree or higher
- 21% had received **no formal theological education** (compared with 37% non-LOM)
- 18% had a masters of divinity degree (compared with 20% non-LOM)

Figure 5: Director Age, n=69

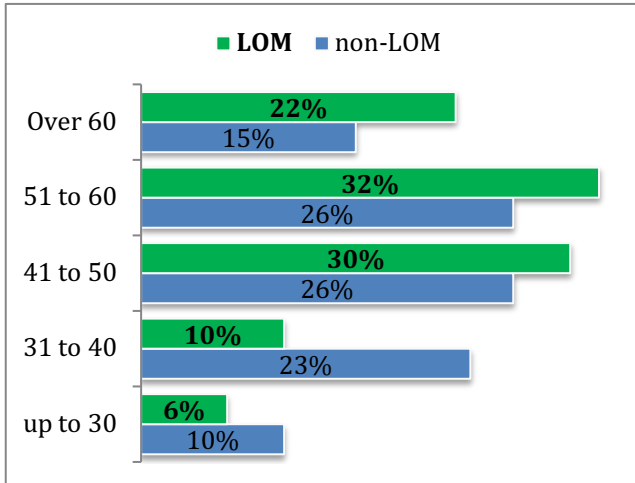
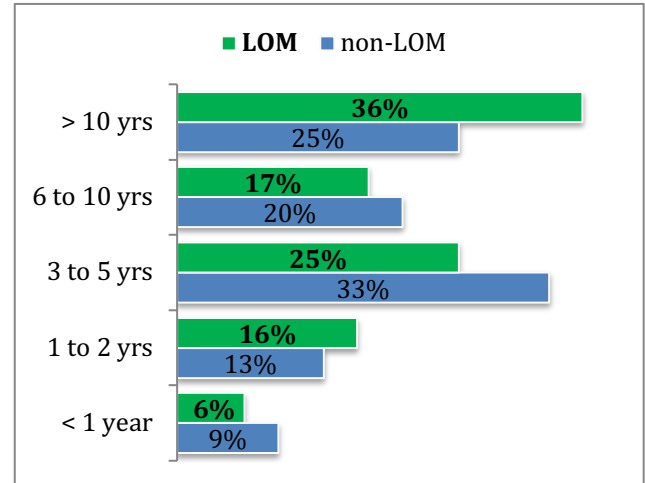


Figure 6: Director Tenure, n=69



- LOM directors were older, had longer average tenures, and had more theological education, on average, than their counterparts in the other denominations studied.
- The high turnover evident among LOM directors in the 2018 survey did not continue in 2020. A majority of directors had been in their position for more than 5 years.
- As in previous years, LOM directors were more likely to be male than any other denominational director.

Part 2: Impacts of COVID-19 Pandemic

The COVID-19 outbreak was officially designated a global pandemic on March 11, 2020. By the middle of the following week, schools across the United States were closed and summer camps were left to determine how to respond, since summer camp registration and staff hiring were well underway. State, provincial, and local health departments forced the closure of many summer camps and retreat centers, while others were left to make choices on their own as to what, if any, programs they would offer

Figure 7: LOM Onsite Programming Summary in Summer 2020, n=73

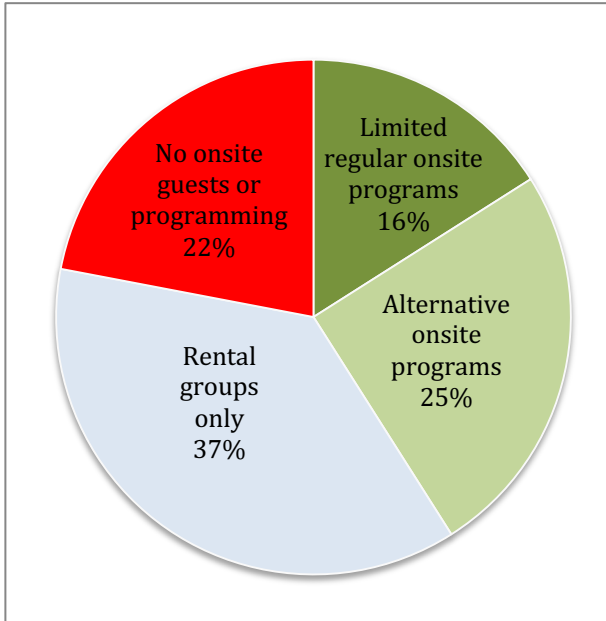


Figure 8: Revenue from Fundraising and Donations, in Comparison with Previous Year, n=67

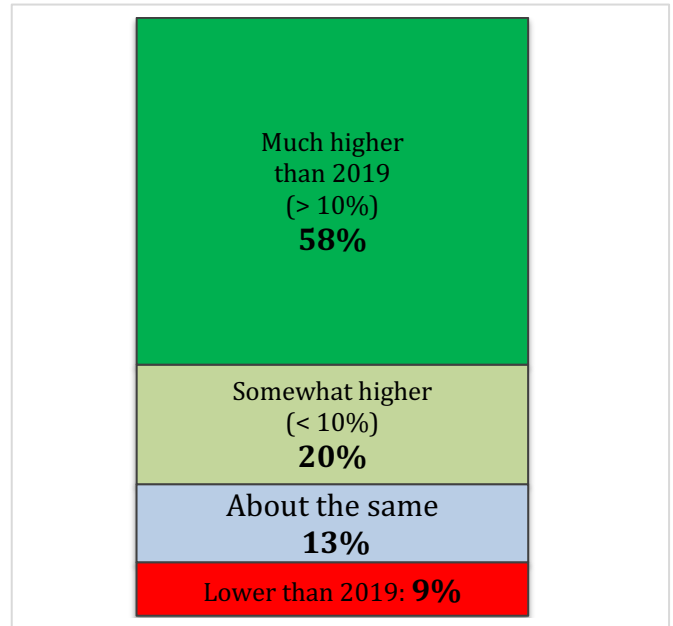


Table 1: Avg. Lost Revenue, by Budget Category

Organization Budget	#	Avg. Lost Revenue
Under \$200,000	3	\$33,333
\$200k to \$500k	18	\$185,667
\$501k to \$1 million	23	\$314,644
Over \$1 million	22	\$912,969

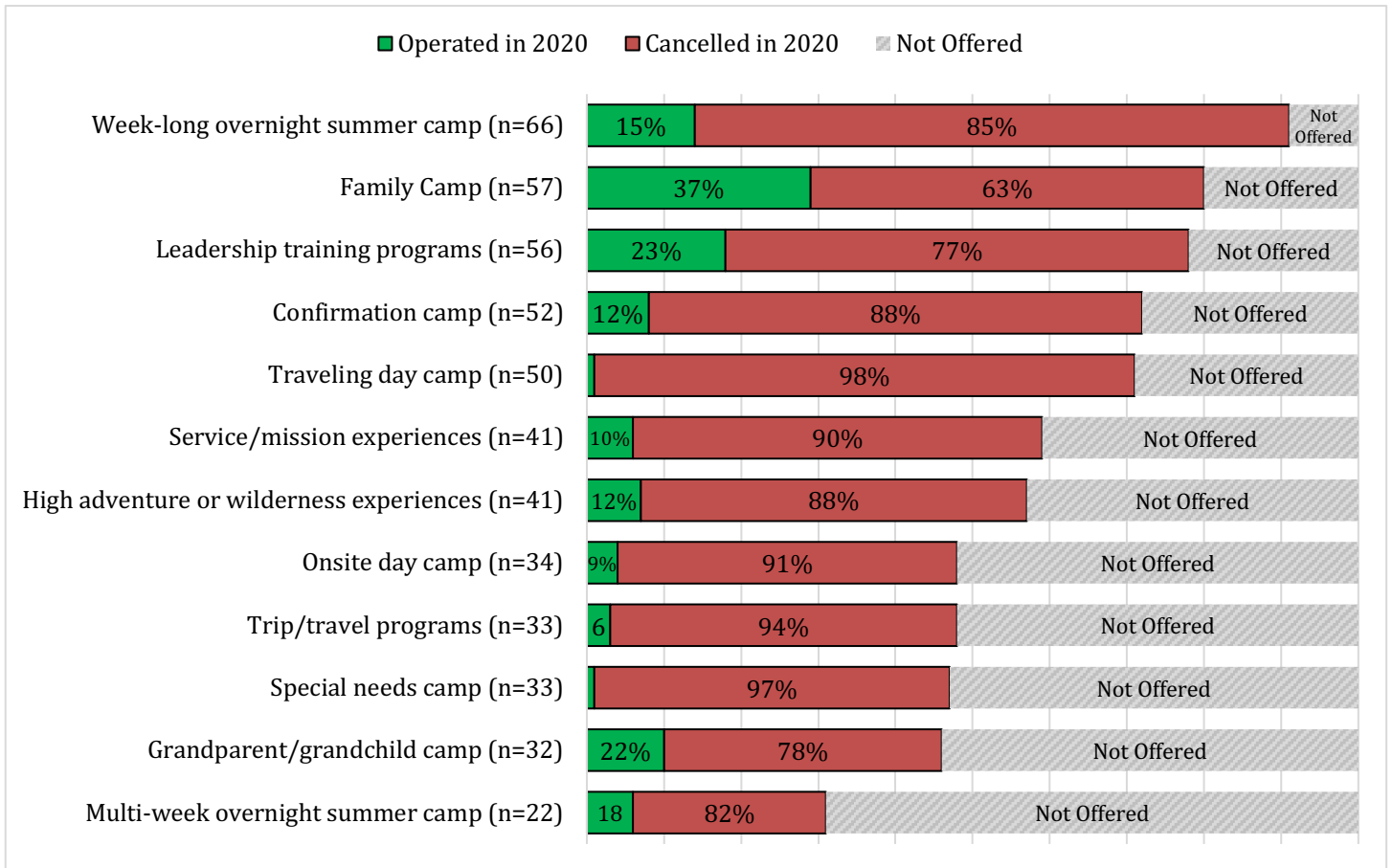
81% of LOM respondents indicated having unbudgeted expenses related to COVID-19 mitigation. A third of these were minimal (under \$1,000), with another third \$1,000-\$3,000, and the final third over \$3,000. The average expenditure was \$3,600.

Responding ministry centers reported a combined total of more than **\$30 million** in lost revenue.

Table 2: Overall Summer Camp Number Change 2019-2020

	# camps	2019 Total	2020 Total	Percent change
Overnight summer campers	65	57,444	5,263	↓ 91%
Day campers	27	3,166	77	↓ 98%
Family campers	49	9,421	3,020	↓ 68%
Summer staff	62	2,596	652	↓ 75%

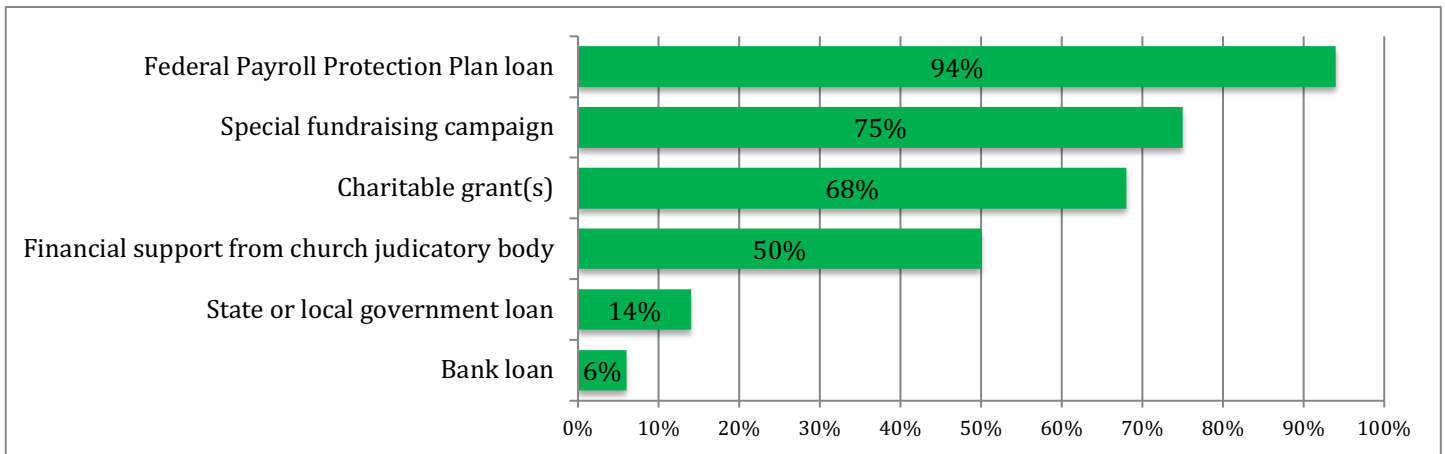
Figure 9: Summer Programs Offered and Cancelled in 2020



Staff Impacts

- Half of all responding LOM organizations (49%) had to furlough, lay off, or reduce the salary of full-time staff members. Almost two-thirds (60%) had to do the same to part-time staff members.
- 21% of Executive Directors took a reduction in salary, with the majority having their salary reduced by 20% to 50%.
- **Full-time, year-round staff (n=464):**
 - 9% were furloughed
 - 7% were laid off
 - 20% had their salaries reduced
 - 36% experienced at least one of these
- **Part-time, year-round staff (n=563):**
 - 17% were furloughed
 - 11% were laid off
 - 13% had their salaries reduced
 - 35% experienced at least one of these

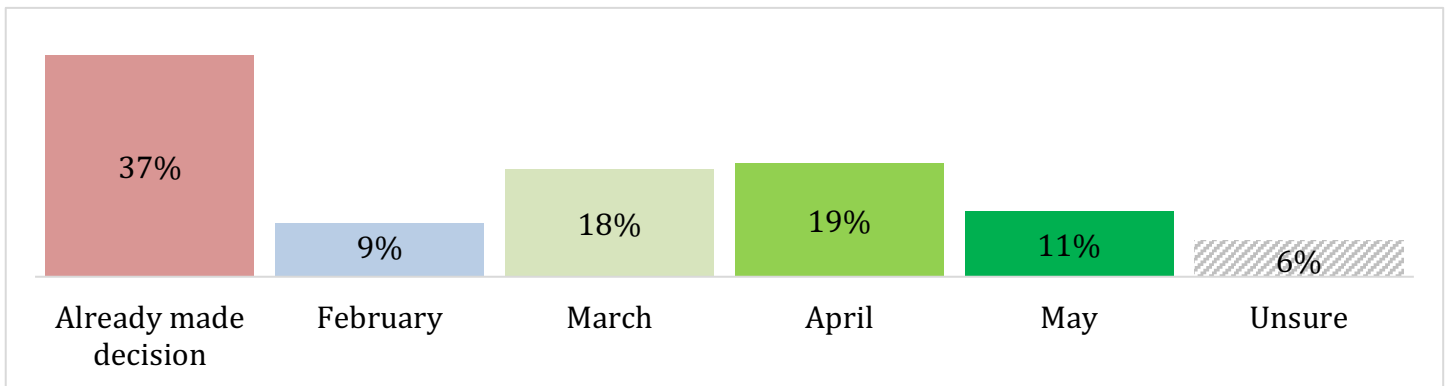
Figure 10: Percent of Ministry Centers Receiving Financial Assistance in Response to COVID-19 Pandemic, n=67



Future Projections

Respondents were asked when they intended to make a final decision for programming in summer 2021.

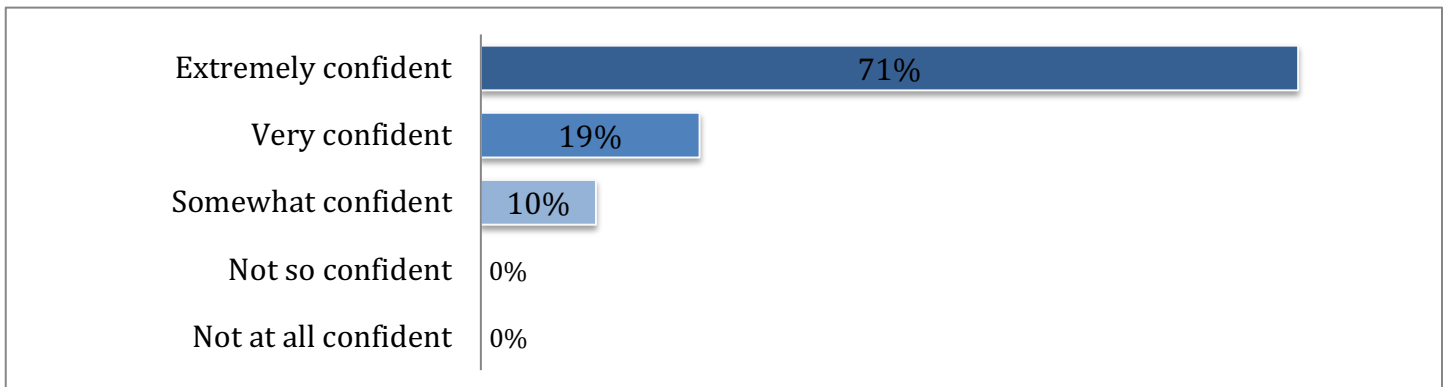
Figure 11: Projected Timing for Final Decision on Summer Camp 2021, n=67



Plan for Summer 2021

16% hoped to open at FULL capacity, **70%** at limited capacity with normal programs, with the rest planning to open for alternative programming or still unsure.

Figure 12: Director Confidence that Ministry Center will be Operating in 2 Years, n=69



Part 3: COVID-19 Mitigation Strategies

Figure 13: Prevalence of Camper Screening for COVID-19 in Summer 2020, n=28

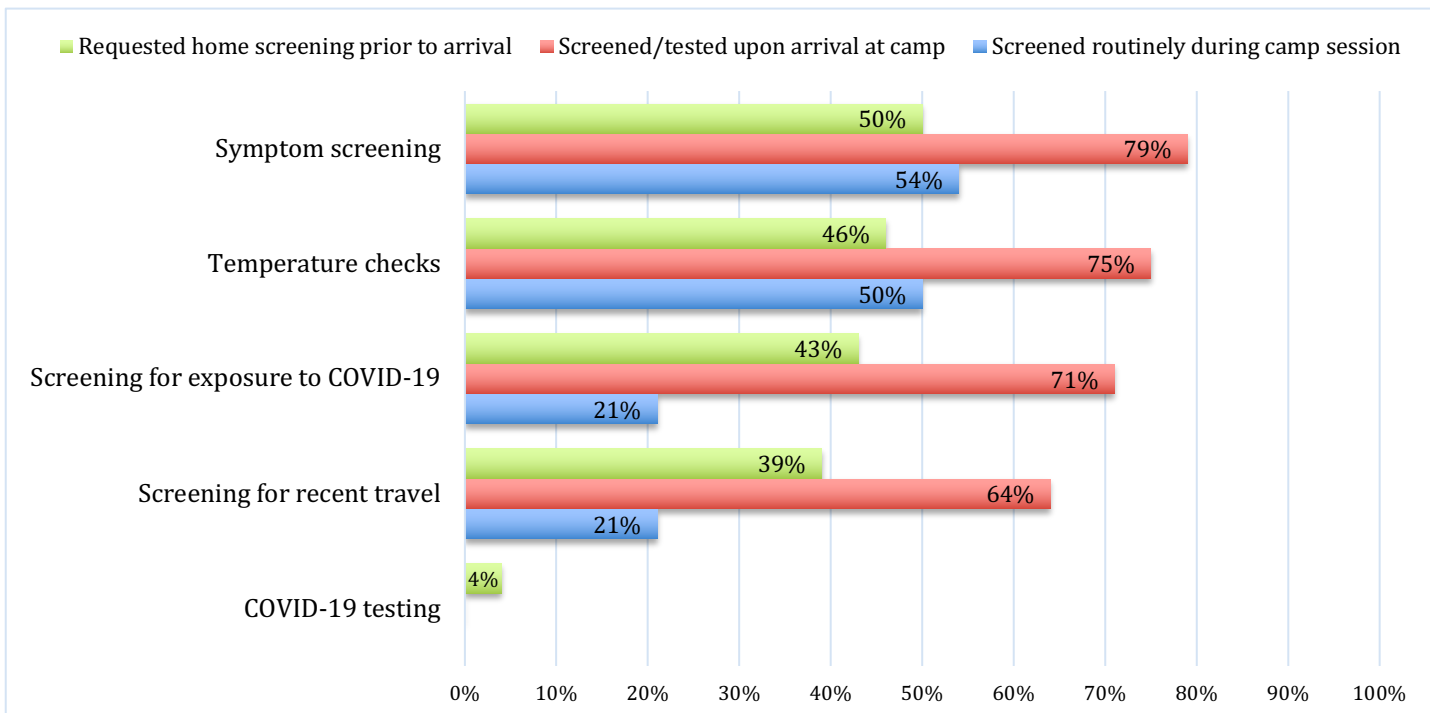
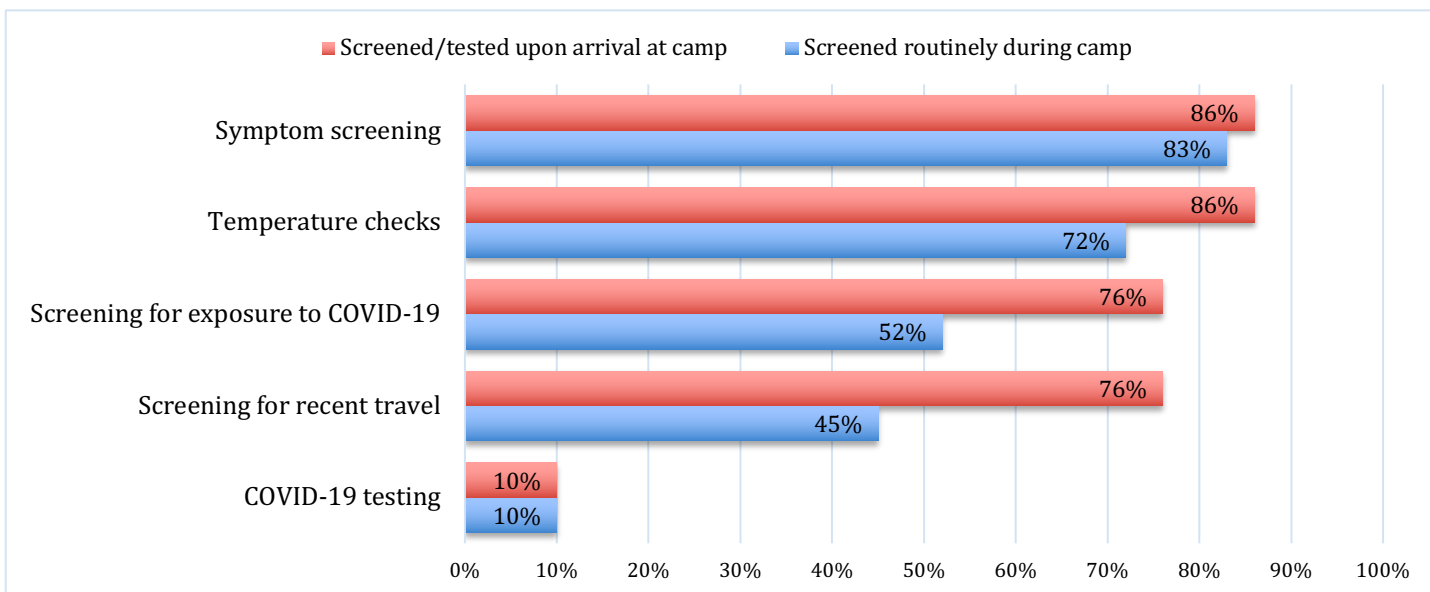


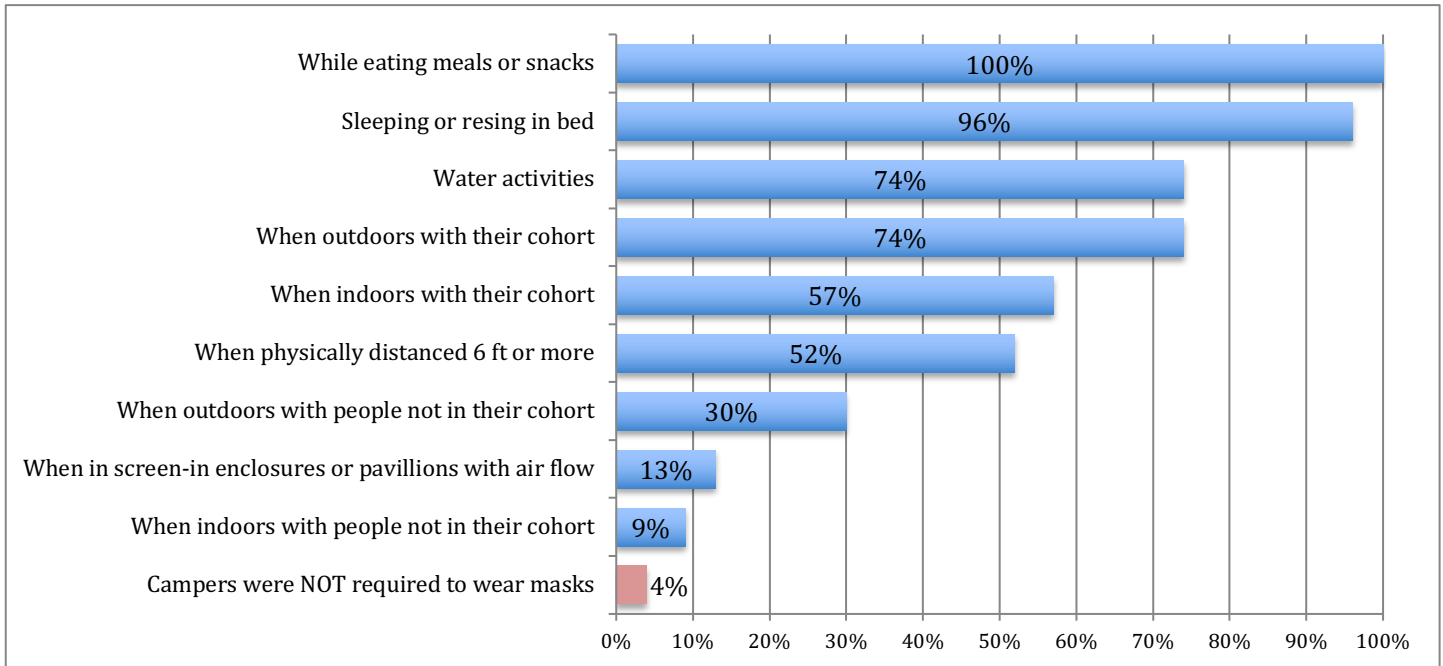
Figure 14: Prevalence of Summer Staff Screening for COVID-19 in Summer 2020, n=29



Masks

According to scientific recommendations available in summer 2020, the most effective methods of preventing COVID-19 while in a group setting were to physically distance (6 feet apart or more), be outside as much as possible, and wear a mask. The vast majority (96%) of camps and retreat centers that offered some form of in-person programming required participants to wear masks. However, mask rules varied based on the different activities. Directors were asked when campers and other guests were allowed to remove their masks.

Figure 15: Percentage of Operating Camps Allowing Campers to Remove Masks During Various Activities, n=23



Confirmed COVID-19 cases (27 ministries with onsite programs)

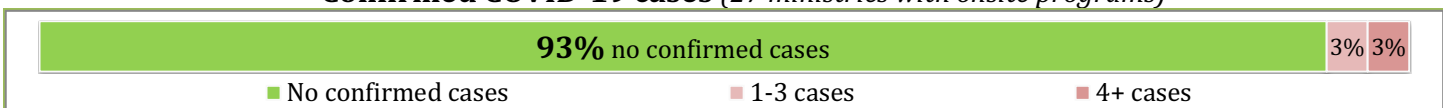


Figure 16: Percentage of Operating Camps with Confirmed Cases of COVID-19, n=27

- Only 2 of the responding camps had confirmed COVID-19 cases on site. The above percentages do not add to 100% because of rounding error.

Part 3: Summer Camp

Overall summer program summary (of 67 outdoor ministries):

- 49% had primarily co-ed residential summer camp for children/youth
- 37% ran a combination of traditional summer camp and retreats or other programs
- 8% ran primarily family camp or rental facilities
- 4% were primarily adult retreat facilities during the summer

Weeks of Summer Programming:

The number of weeks for summer programming was sharply curtailed in 2020. A third of camps did not have any weeks of summer programs. About a third had limited weeks of programming (1-6 weeks). Fewer than a third (31%) had the more typical summer lengths of 7 or more weeks of programming. Traveling day camp was almost totally canceled in 2020. Only one camp tried an online version of the program.

Figure 17: Centralized v. Decentralized Programming, n=65

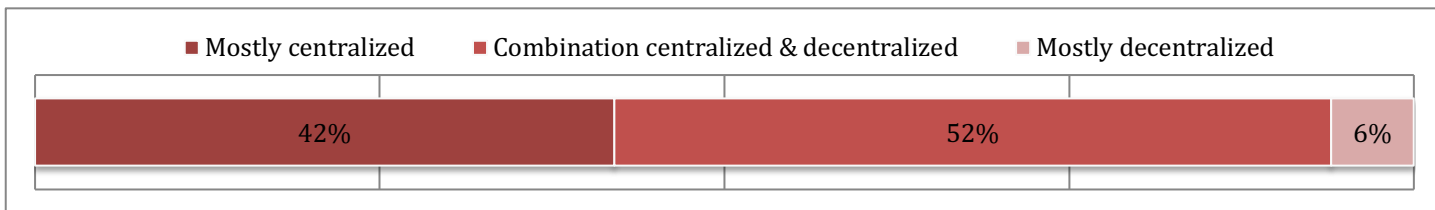
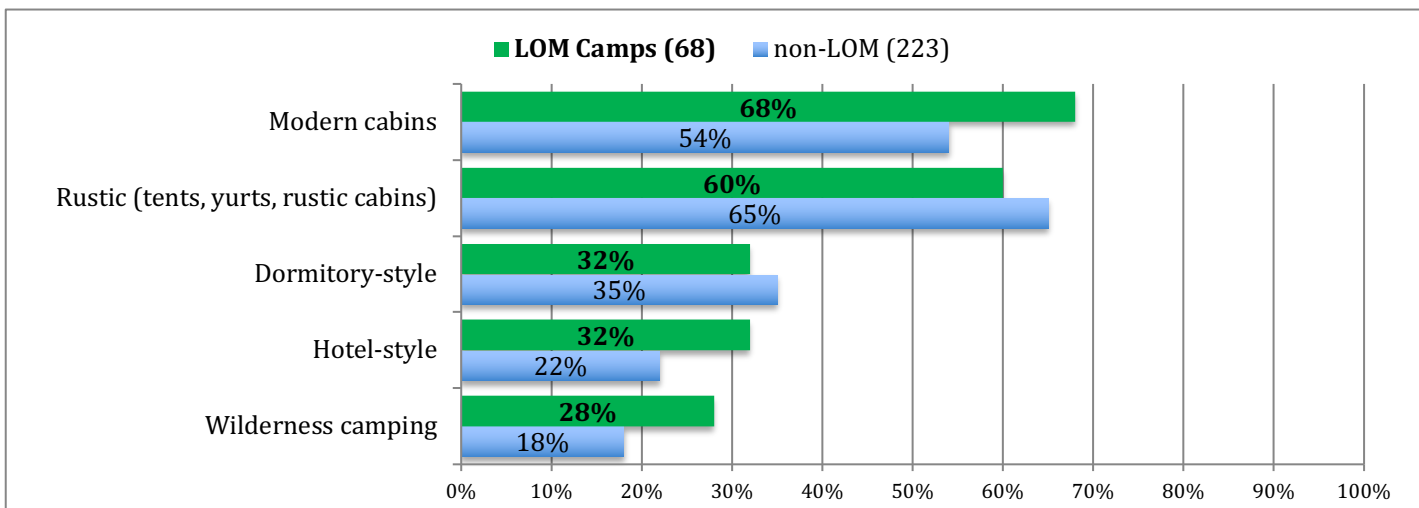


Figure 18: Summer Housing Accommodations Offered



Virtual Camp:

Many camps chose to offer virtual or distance summer camp programs in response to the COVID-19 pandemic. These programs included registered campers and some form of regular programming. Over a third of responding LOM camps (38%) indicated that they offered virtual camp programs in 2020. Virtual programs were typically small in terms of camper numbers, with half serving 50 or fewer campers. They averaged 140 participants.

Average weekly overnight camp fee: \$452 (up from \$430 in 2018)

- Half reported weekly fees between \$400-\$485, with one quarter lower and one quarter higher

Table 1: Average Weekly Camp Fee, by Region

	Northeast	Midwest	South	West	All USA
LOM Camps	\$479	\$457	\$450	\$410	\$452
Non-LOM Camps	\$440	\$401	\$481	\$466	\$454

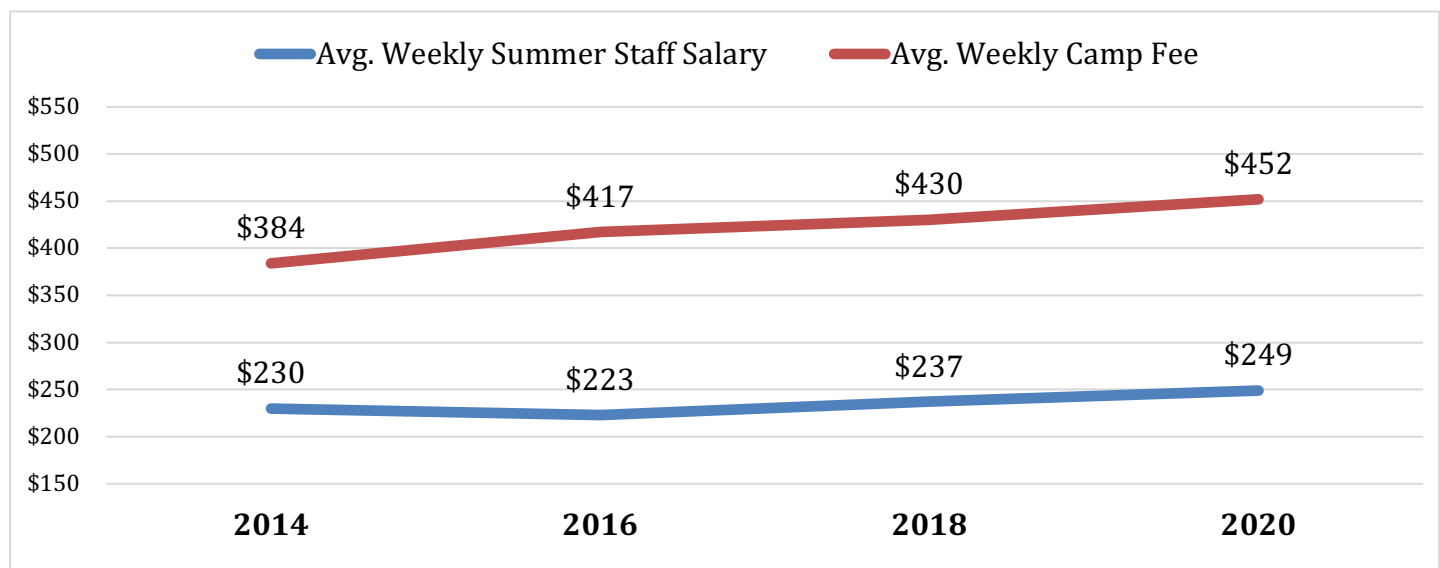
Average weekly summer staff salary: \$249 (up from \$237 in 2018)

- Half paid summer staff between \$225-\$250 per week, with a quarter lower and a quarter higher.

Table 4: Average Staff Salary, by Region

	Northeast	Midwest	South	West	All USA
LOM Camps	\$213	\$262	\$200	\$259	\$249
Non-LOM camps	\$248	\$248	\$244	\$296	\$256

Figure 19: LOM Summer Staff Weekly Salary and Weekly Camper Fee Trends in United States 2014-2020



Returning Summer Staff (n=57):

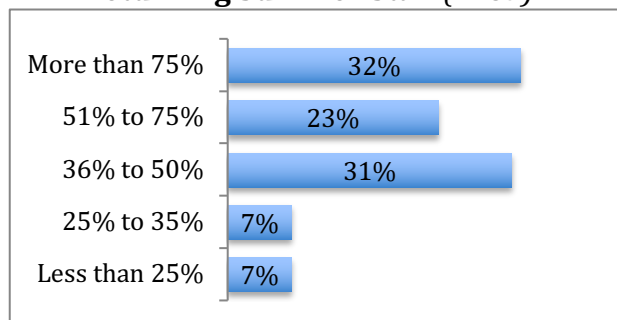


Figure 20: % of Staff Returning from Previous Summers

Camper Diversity (n=28):

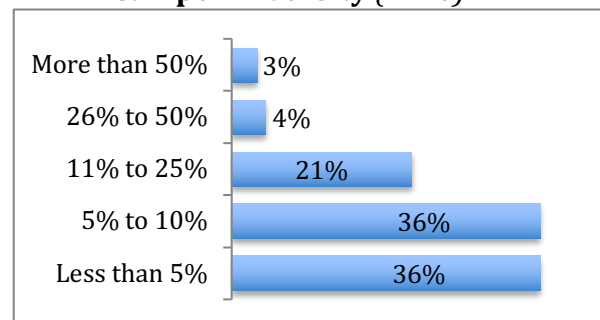


Figure 21: % of Campers representing Racial Minorities

Summer Camp Enrollment and Capacity

Summer Camp Capacity:

A third of LOM organizations had a capacity of 120 or fewer campers. Another third had a capacity of 121-199, and the remaining third 200 or more campers at once. Average capacity was 184.

Table 3: Summer Camp Enrollment:

	LOM 2014	LOM 2016	LOM 2018	LOM 2019**	LOM 2020	non-LOM 2020
90% capacity or higher	14%	16%	8%	-	5%	4%
75% to 89% capacity	42%	33%	31%	-	2%	3%
50% to 74% capacity	44%*	44%	45%	-	7%	14%
Less than 50% capacity		7%	16%	-	86%	79%
Enrollment higher than previous summer	41%	49%	26%	-	5%	4%
Enrollment about the same as previous	28%	40%	38%	-	5%	7%
Enrollment lower than previous summer	32%	11%	36%	-	90%	89%
Highest of past 5 summers	-	22%	13%	20%	1%	2%
Higher than most of past 5 summers	-	22%	24%	15%	2%	4%
About the same as past 5 summers	-	34%	32%	48%	5%	6%
Lower than most of past 5 summers	-	20%	23%	14%	6%	6%
Lowest of past 5 summers	-	3%	8%	3%	86%	82%

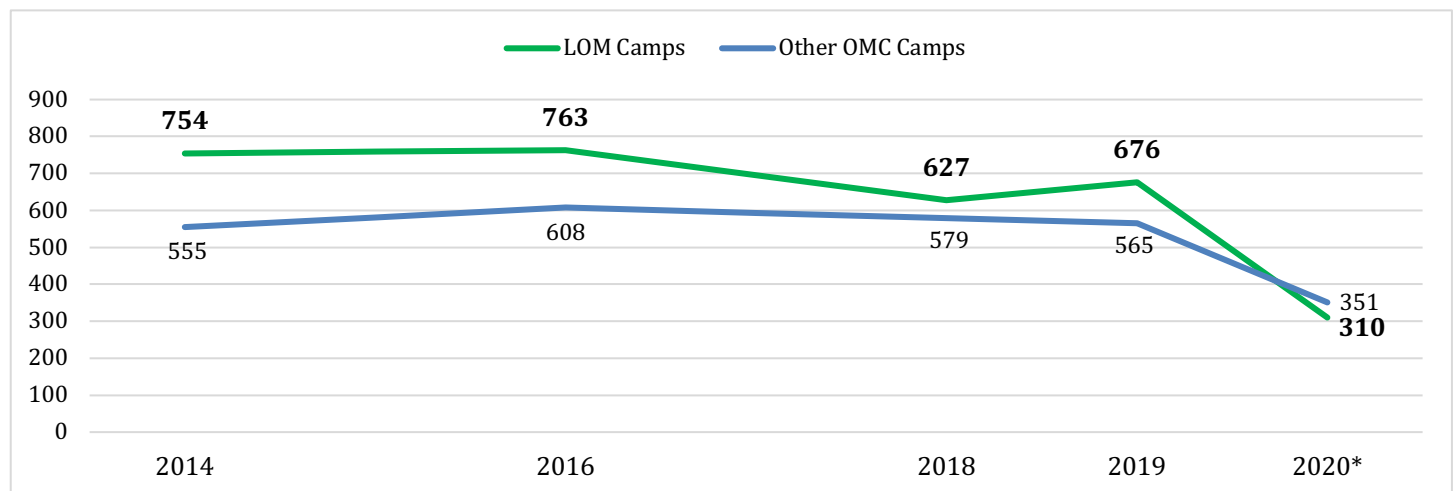
* The 2014 survey did not include the category “less than 50%”; the number represents “less than 75%”

** A single question about 2019 enrollment was included in the 2020 survey

Overnight Camp Attendance:

Summer camp attendance plummeted in 2020. The 65 camping organizations providing numbers reported serving 57,444 overnight campers in 2019 and only 5,263 in 2020, a net decline of 91%. Three-quarters of these camps did not serve any overnight campers in 2020. The 17 that hosted overnight campers averaged 310, less than half of the 2019 average among LOM camps.

Figure 22: Average Number of Overnight Summer Campers, 2014-2020



*2020 numbers represent only those camps that offered overnight camp programs that summer (88% canceled).

Part 4: Retreats and Conferences

Primary clientele for retreats/conferences (n=62):

- 76% Mix of children, youth, adults, and families
- 23% Primarily adults
- 1% Primarily youth/children

Retreat Accommodations Offered:

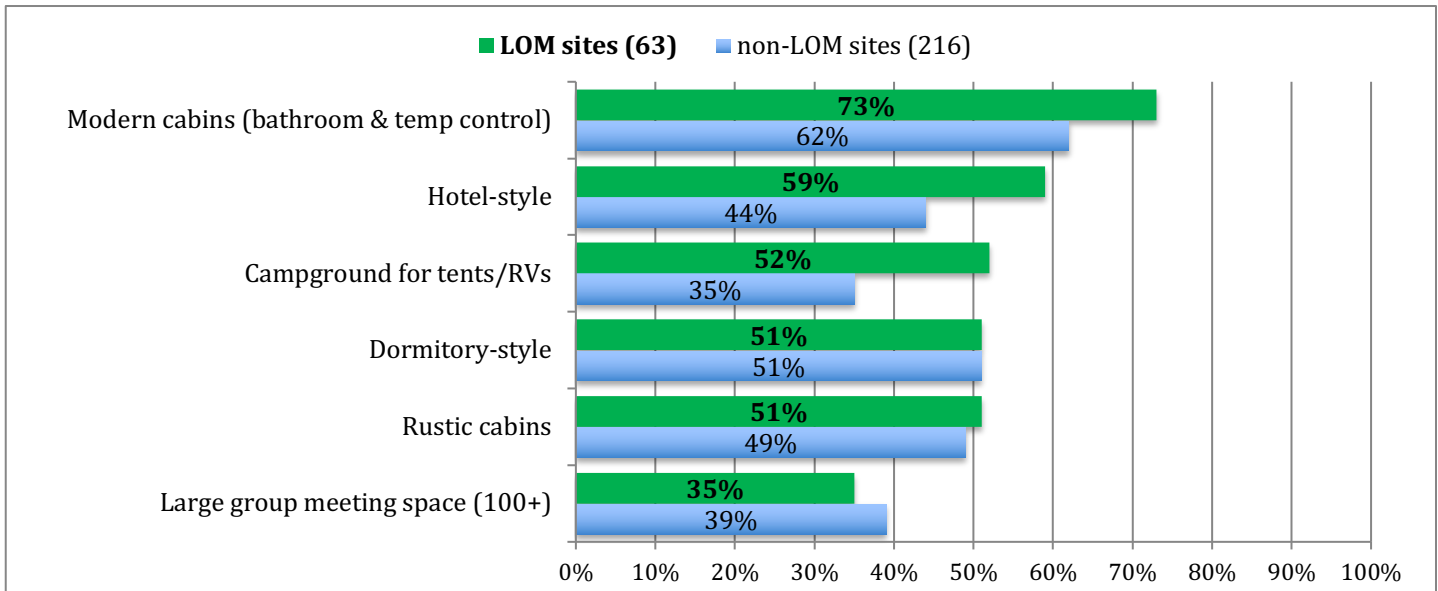


Figure 23: % of Camps Offering Selected Housing Accommodations for Retreat Participants

Seasonal Retreat Staff:

The 62 organizations responding to this question employed a total of 211 seasonal retreat staff in the fall of 2019 and only 65 in the fall of 2020, a decline of 69%. A third of these organizations did not employ any seasonal retreat staff either year, while this number was two-thirds in 2020.

Retreat Guest Affiliation

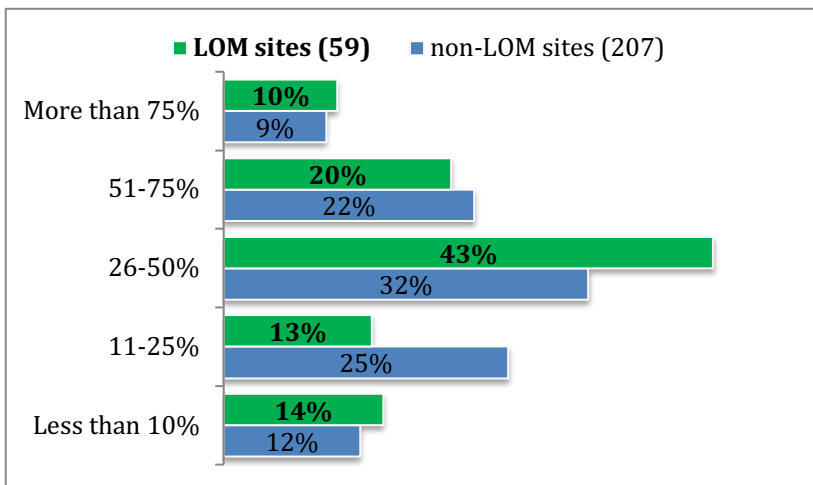


Figure 24: % of Camps Indicating Retreat Participants Affiliated with Constituent Denomination/Congregations

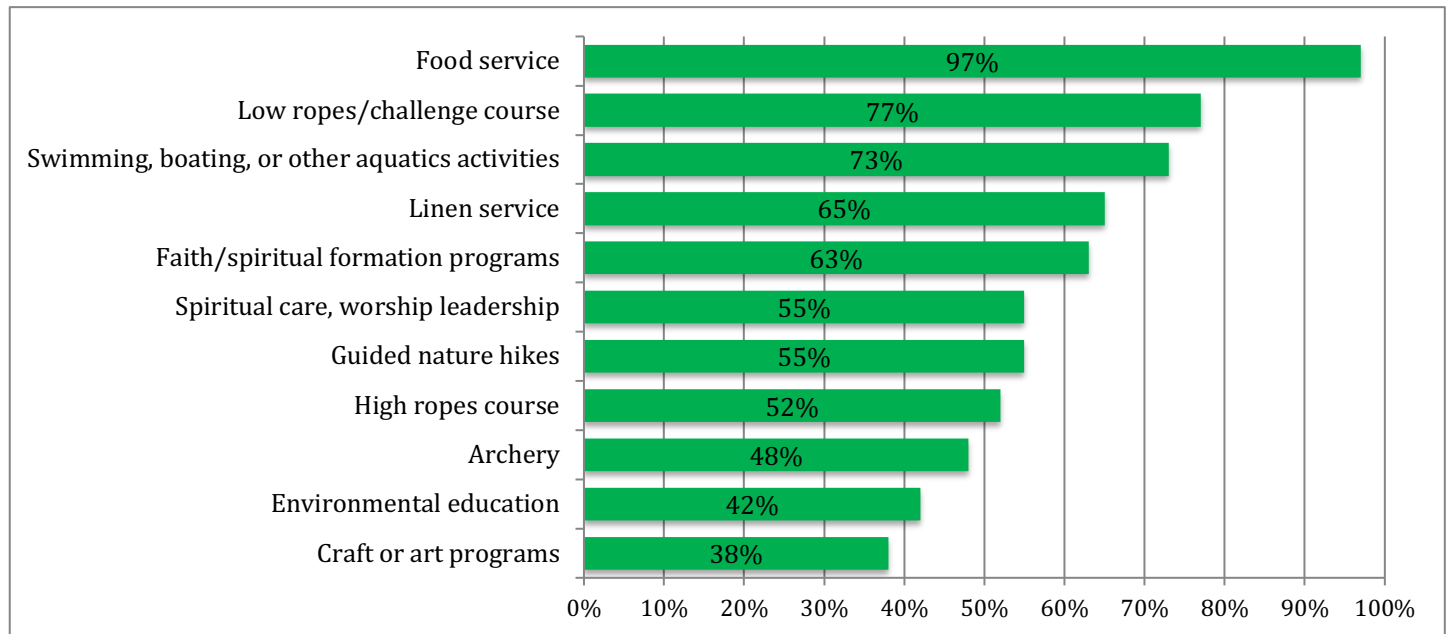
Overnight capacity for retreats/conferences (n=62):

A quarter of ministry centers reported that their overnight retreat capacity was under 100 guests. Another quarter had a capacity of 100-135, another quarter 136-200, and the remaining quarter had a capacity over 200 guests. Average overnight capacity was 160.

Table 2: Retreat/Conference Usage

	2016 LOM Sites	2018 LOM Sites	2020 LOM Sites n=65	2020 non-LOM sites
90% capacity or higher (<i>weekends</i>)	4%	6%	1%	1%
75% to 89% capacity (<i>weekends</i>)	16%	30%	2%	1%
50% to 74% capacity (<i>weekends</i>)	37%	30%	5%	5%
Less than 50% capacity (<i>weekends</i>)	43%	33%	92%	93%
Usage higher than previous year	46%	47%	5%	2%
Usage about the same as previous	37%	35%	3%	2%
Usage lower than previous year	17%	18%	92%	96%
Highest of past 5 years	17%	13%	1%	2%
Higher than most of past 5 years	28%	36%	5%	2%
About the same as past 5 years	40%	38%	2%	5%
Lower than most of past 5 years	15%	12%	1%	7%
Lowest of past 5 years	0%	1%	91%	84%

Figure 25: Percentage of Ministry Sites Offering Selected Retreat Programs, n=60



Part 5: Camp Philosophy

Level of Agreement with Philosophy Statements about Ministry Site (out of 67 LOM ministries)

Right-hand column indicates whether LOM centers, on average, agreed significantly more than (↑), less than (↓), or were no different from (≈) non-LOM centers. Items are arranged in order of average agreement level.

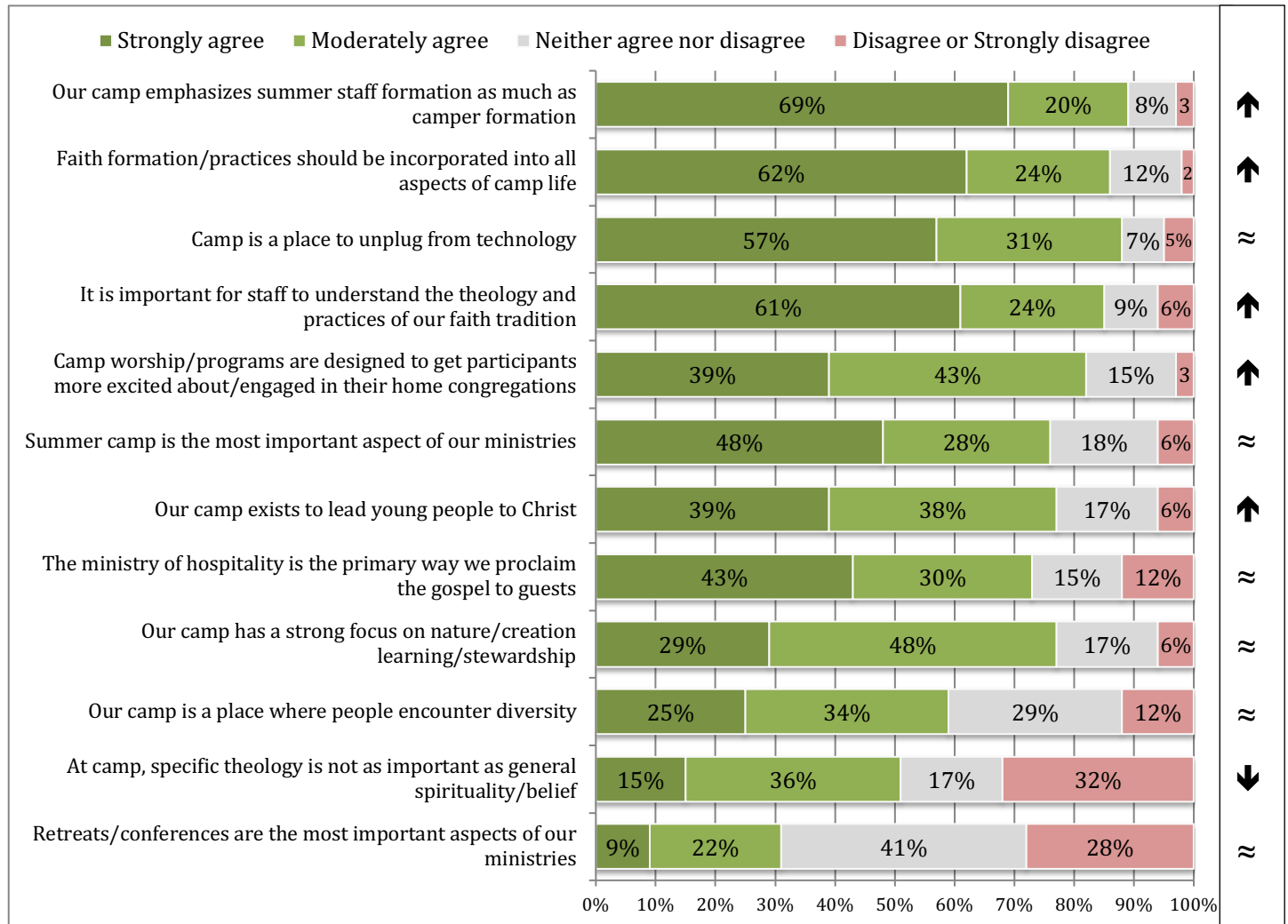


Figure 26: Level of Agreement with Philosophy Statements about Ministry Site

- As in previous years, the items in which LOM directors showed significant differences from their colleagues centered on faith emphasis and connection to congregations or denominational ministries, helping to explain the prevalence of Type 4 camps in LOM.
- There was a large and statistically significant increase in agreement with, “Our camp emphasizes summer staff formation as much as camper formation,” indicating a renewed or increased focus on this aspect of ministry.
- The trend continued toward greater agreement with the item, “Our camp has a strong focus on nature/creation learning and stewardship.” The increase has been steady among LOM directors since the survey began in 2014.

Level of Importance Assigned to Selected Program Priorities (of 67 LOM ministries)

Symbols at right indicate if LOM directors, on average, assigned significantly more (↑), less (↓), or equal (≈) importance to each statement compared with non-LOM directors. Items are arranged by average importance.

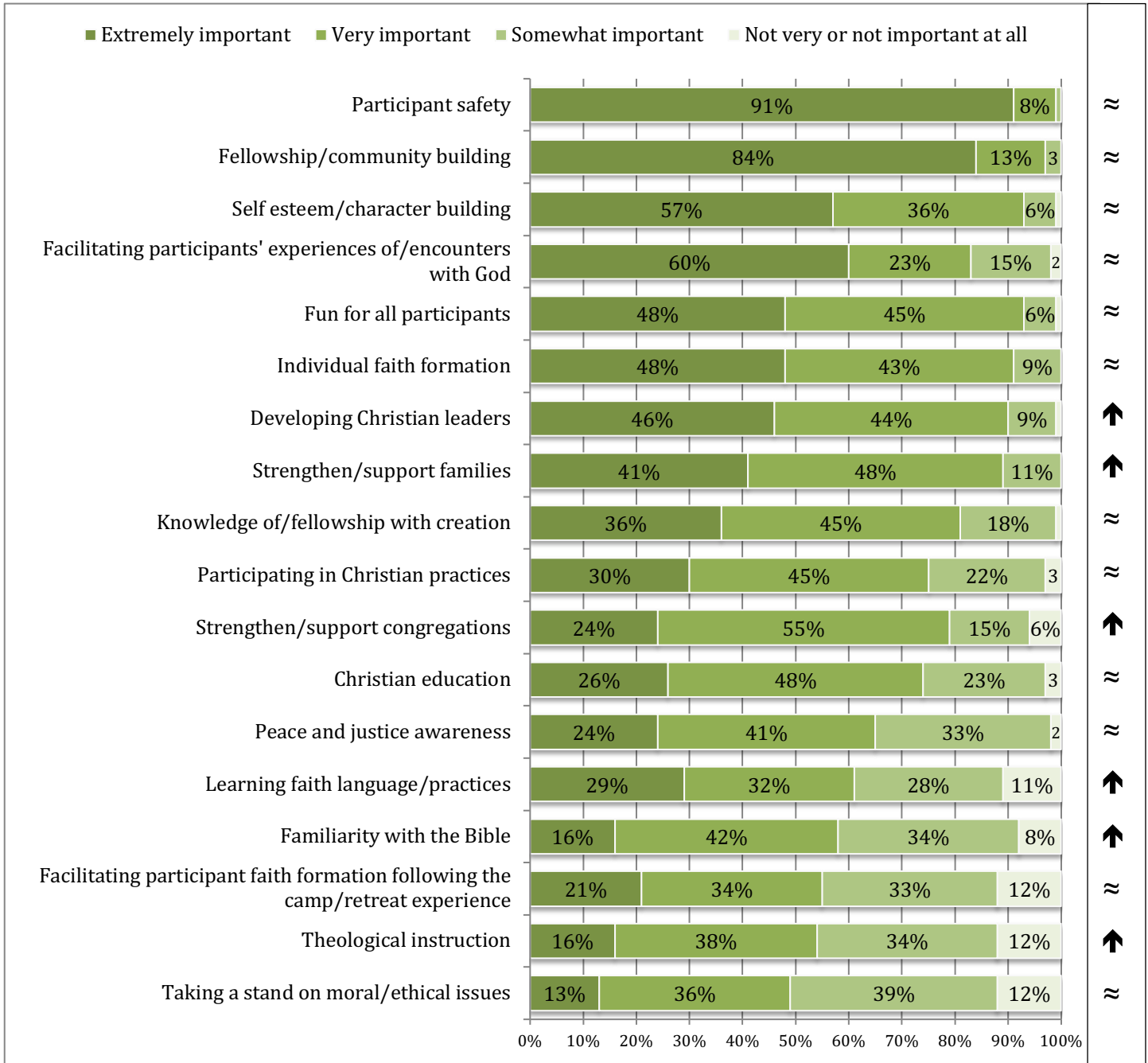


Figure 27: Level of Importance Assigned to Selected Program Priorities

- LOM directors assigned higher levels of importance to 6 of the above 18 items in comparison to non-LOM directors. A closer look at these items reveals that they are associated with Christian education and connection to other ministries (congregation and home).
- The importance assigned to “Individual faith formation” has declined notably since the survey began in 2014. For the first time, it had the same average importance as “fun for all participants.”