



DAY CAMP AN INDUSTRY STUDY

Things you will learn from this whitepaper:

1. Why are accreditation & licensing key factors affecting the camping industry?
2. How do day & overnight camps help protect & maintain local economies?
3. How industry standards make facilities more efficient?

This whitepaper will have special interest to:

1. Attorneys consulting with camp owners considering mergers or acquisitions.
2. Judges presiding over business disputes & litigation cases.
3. Business mediators & arbitrators.
4. Those concerned with the valuation of day camps.

Notice & Disclaimer

In a forensic accounting setting, the purpose of an industry analysis is to allow a comparison of the subject company to its industry. This comparison is vital to assess the strengths and weaknesses of the subject company, as well as its industry and company specific risks.

The following study contains a brief, selected analysis of the specified industry. It is based upon a review of current economic statistics, articles in the financial press, reviews found in current business periodicals and information posted on numerous internet sites. It does not purport to be all-inclusive or to contain all of the information which a prospective investor or lender may require. Projections and opinions are based upon information provided by third parties. We make no representations or assurances that this information is complete or accurate. Neither Mark S. Gottlieb, CPA, PC nor any of its officers, employees, or representatives make any representation as to the accuracy of completeness of this report or its contents, nor shall any of the foregoing have any liability resulting from the use of the information contained herein or otherwise supplied.

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For More Information Please Contact

MARK S. GOTTLIEB
CPA/ABV/CFF, CVA, CBA, DABFA, MST

Tel: 646-661-3800 / 914-294-4300 / 203-357-1500 / 973-226-4500

Email: msgcpa@msgcpa.com

Website: www.msgcpa.com



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Industry Overview

The children's camping industry is a vastly diverse industry. Once considered principally for recreation, the children's camping industry has evolved into an offshoot of the larger industry of child-care. This has resulted from a change in focus by many camps, which have begun to incorporate day-care programs into their established schedules. This change in focus seems to have been spurred by the desire of parents to have more enriching alternatives when it comes to the care of their children, as well as the camp's desire to improve their economic outlooks. With so many households made up of either single parents working full-time, or two parent families where both parents are working full-time, child-care has become an immensely important issue.

Many parents are looking for camps of varying types to act as surrogate child-care facilities. Parents choose camps because of the benefits they offer a child in recreation, education, and social development. The cost of child-care has become a major national focus, and more and more parents have chosen camps of varying types to meet their child-care needs. In their 1999 survey, the American Camping Association (ACA) found that over 50% of the respondents reported an average increase in enrollment of 9% over the figures from 1998. Demographic trends suggest that the need for child-care alternatives will continue to increase. From the years 1986 to 1996, the population of women of childbearing age (ages 15-44) increased by over 2 million. This corresponds with the increase in their labor force participation.

The children's camping industry maintains a unique niche by impacting the social growth of children, the economic growth of a community, and often the environmental preservation of many acres of land. There are more than 8,500 Day and Overnight camps operating throughout the country. Each camp varies greatly in the types of amenities, activities, and programs offered to children of varying ages.

The American Camping Association states that there are approximately 6,200 camps operated by nonprofit groups including youth agencies and religious organizations, and 2,300 privately owned independent for-profit operators. It also states that the most popular camp session length is one week to two weeks, however the majority of independent camp operators offer four, six and eight week sessions.

There are two general types of children's camps, day camp and overnight camp. Day Camps offer activities during specific camp hours, and may or may not include meals and/or snacks. Day camps do not include overnight lodging for either the children or staff. Overnight Camp is a camp in which activities, lodging, and meals are included for both the children and the staff. Campers attending overnight camp sleep on the camp premises. Although, each type of camp varies greatly in the types of activities it offers, camps generally provide a program consisting of outdoor activities, such as hiking, swimming, games, sports, arts and crafts, and programs designed to promote awareness of nature. Many camps in the industry have set themselves apart by emphasizing and specializing in specific camping programs. Specific emphasis and programs include, but are not limited to:

- Sports
- Music
- Horseback Riding



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- Outdoor Adventures
- Religion
- Special Needs
- At Risk Youths
- Weight Loss
- Theatre

Local Economics

The children's camp industry contributes to the economic growth of a community by providing employment opportunities, and promoting tourism in the form of tuition from out of state enrollees. This includes the money spent by the families of the out of state children on transportation, food, lodging, shopping, and entertainment. Camps also contribute to the well being of a community by often occupying large acres of land thereby protecting and maintaining many areas of shoreline and forested land.

Industry Standards

Although, it is not required by law that a children's camp be accredited, it is mandated that they be licensed. However, it is in the children's camp's best interest to become accredited. Camps that obtain accreditation are held to the Industry Standards for accreditation as set forth by the ACA. The ACA's accreditation program is continually evaluated and updated. The following is a listing of some of the accreditation standards:

- Site/Food Service: Fire protection, maintenance, sleeping areas, bathing/toilet facilities, food service areas and practices;
- Transportation: Driver and vehicle requirements, traffic control, transportation safety;
- Health Care: Staff and facility requirements, medication management, required health information and record keeping;
- Management: Safety and security regulations, staff emergency training, crisis communications, insurance, planning;
- Staffing: Staff qualifications, training, ratios, supervision and behavior management guidelines; and
- Program: Goals for camper development, orientation and safety policies for general and specialized programs, including aquatics, challenge courses, trips, and horseback riding.

According to the ACA, currently only 25-30 percent of an estimated 8,500 Day and Overnight camps seek accreditation.



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MARK S. GOTTLIEB, CPA, PC

<p>NEW YORK, NY 1430 BROADWAY, SUITE 902, NEW YORK, NY 10018 TEL: 646-661-3800 / 516-829-4936 / FAX: 646-661-3801</p>		
<p>WHITE PLAINS, NY 50 MAIN STREET SUITE 1000 WHITE PLAINS, NY 10606 TEL: 914-294-4300 FAX: 914-294-5302</p>	<p>STAMFORD, CT ONE STAMFORD PLAZA 263 TRESSER BOULEVARD, 9TH FLOOR STAMFORD, CT 06901 TEL: 203-357-1500 FAX: 203-357-1505</p>	<p>ROSELAND, NJ 101 EISENHOWER PARKWAY SUITE 300 ROSELAND, NJ 07068 TEL: 973-226-4500 FAX: 973-226-4508</p>



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