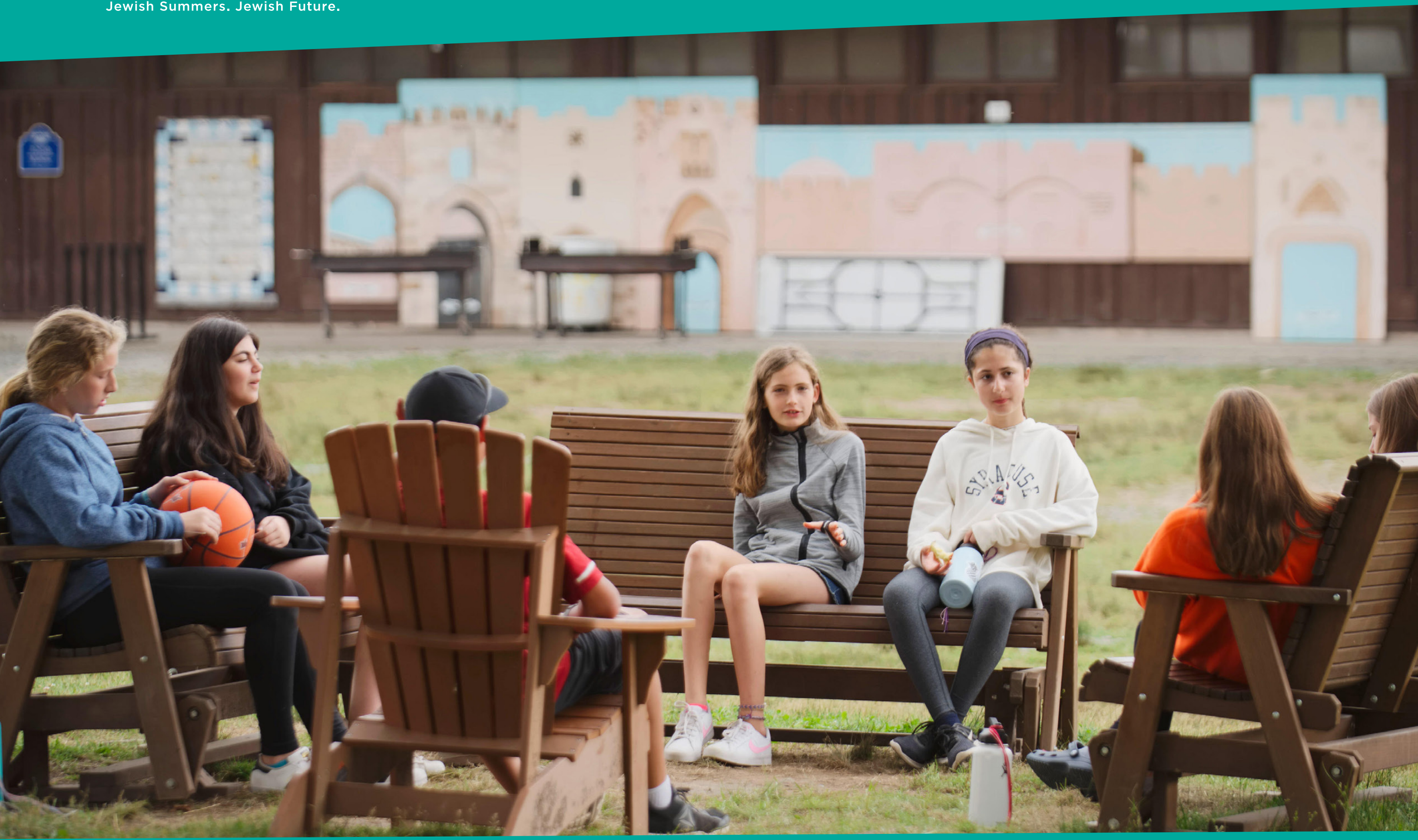
Jewish Summers. Jewish Future.




# OVERNIGHT JEWISH CAMP IN NORTH AMERICA 2019

HIGHLIGHTS FROM

**FOUNDATION FOR JEWISH CAMP**

2019 CAMP CENSUS

## CONTENTS



# EXECUTIVE SUMMARY

**The 2019 Foundation for Jewish Camp (FJC) Overnight Census reports several important features of the nonprofit overnight Jewish camp sector in North America.**

### Camper Enrollment:

- **In 2019, camper enrollment was stable.** 164 nonprofit Jewish overnight camps served a total of 80,718 unique campers, a decrease of .5% as compared with 81,146 in 2018.
- **Nearly three quarters of 2019 campers were retained from previous summers.** From summer 2018 to summer 2019, 28% of camps increased their enrollment, 30% of camps decreased their enrollment, and 43% maintained the same enrollment.
- **About a third of camps sold more camper weeks in 2019.** 28% of camps reported that they sold more camper weeks in 2019 than in 2018, and 20% of camps reported that they sold fewer camper weeks this year than last year.
- **2019 camps were just as full as they were in 2018.** 82% of available capacity was utilized.

### College-Age Counselors:

- **More college students worked at camp in 2019.** Counselor staff grew by 6%, with approximately two-thirds of eligible counselors returning to work at camp in 2019, totaling more than 13,000 college-age counselors.

### Family Camp:

- **A little less than half of overnight camps operate a "Family Camp".** Most camps that operate a family camp only offer one family camp session per year, but several offer more. Most of the family camps occur in the summer (before and after typical camper sessions), but 27% operate family camps offering sessions in multiple seasons or year-round.

### Inclusion of Campers and Staff with Disabilities:

- **4.6% of the total number of campers were campers with disabilities.** In 2019, the first year of FJC's Yashar program, 3,744 campers with disabilities were served.

**10th Annual Overnight Census.** FJC is proud to present this 10th annual Census of overnight camps. This Census builds on learning from the previous Census processes, implemented and reported on by JData at the Brandeis University Cohen Center through 2015, and reported by FJC since 2016.

The past Census has shown that the field of overnight Jewish camp has grown in size, scope, and strength. In the last decade, we have seen the number of campers grow by 21%, and the number of camps grow by 15%. The number of staff working at camp has nearly doubled, with more than 25,000 working at camp in 2019.

As the needs of the field have shifted, so has our measurement of growth and strength. We now track and report on serving campers with disabilities, the percentage of campers and staff who identify as Jewish and those who identify as interfaith or multi-faith, campers who are engaged by teen camp programs, and camps offering family camps and year-round programs.

**About the 2019 Census.** The annual Overnight Census was conducted by FJC, in partnership with JCamp180, Jewish Community Center Association of North America (JCCA), Union for Reform Judaism (URJ), National Ramah Commission (Ramah), Association for Independent Jewish Camps (AIJC), and other Jewish camp umbrella organizations and movements.

This report refers to camping "movements." We have combined a few of the ways camps reported movements. "Orthodox" includes Agudath Israel, Bnei Akiva, Nageela, and OU/NCSY; "Zionist" includes Habonim Dror and Hashomer Hatzair; and "Young Judaea" includes Young Judaea and Canadian Young Judaea. All Canadian camps that reported financials in Canadian dollars have been converted to American dollars.

In 2019, 164 overnight camps comprised the FJC network, which is a net decrease of two camps from 2018. This decrease is a result of the closing of two camps; Camp Louemma and Camp Henry Horner. 152 camps completed the Census questionnaire in time to be part of this analysis, and one additional camp began the questionnaire and provided incomplete data that was also included where possible. To calculate the continental camp enrollment total, we imputed the enrollment for the non-responding camps by using their enrollment figures from 2018 (or earlier, if there was no 2018 submission).

# CAMPER ENROLLMENT

**Stable enrollment.** In 2019, 164 nonprofit Jewish overnight camps served a total of 80,718 unique campers, a decrease of .5% as compared with 81,146 in 2018. The 2019 enrollment number is the result of two fewer camps, and a decrease in enrollment at some California camps that were affected by wildfires in 2017 and 2018. From summer 2018 to summer 2019, 28% of all camps increased their enrollment, 30% of camps decreased their enrollment, and 43% maintained the same enrollment.

In the last decade, from 2009 to 2019, we have seen a steady rise in campers, camps, and the number of campers per camp. Overall, the number of campers has grown by 21%, with the number of camps growing by 15%.

**Camp Enrollment**

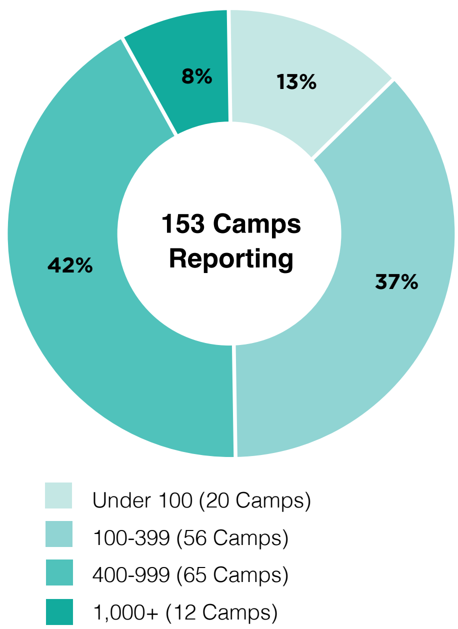
| Year | Number of Camps | Total Number of Campers |
|---|---|---|
| 2019 | 164 | 80,718 |
| 2018 | 166 | 81,146 |
| 2017 | 160 | 80,484 |
| 2009 | 143 | 66,847 |

# NEW SPECIALTY CAMPS

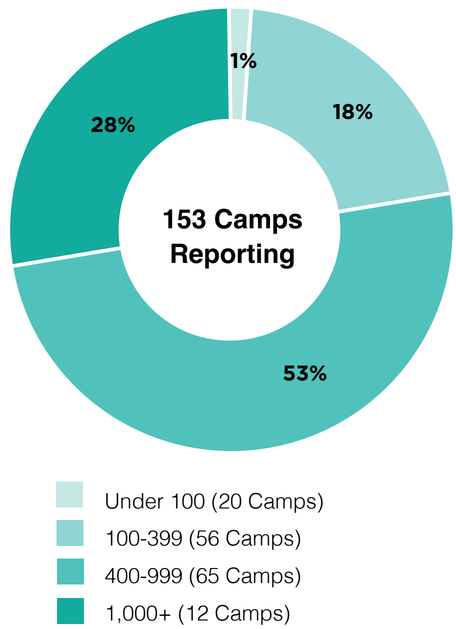
One source of camper growth continues to be the introduction of 17 new Jewish specialty overnight camps opened since 2010. Almost 11,000 campers have participated in one of these camps in the last nine years, and according to FJC's research, more than half of these campers would not have otherwise attended Jewish camp.

## CENSUS, AT A GLANCE

### Unique Camps by Camp Size




### Percentage of Campers




**Camps of various sizes.** Half of the camps report 400 or more unique campers throughout the summer. The number of campers is concentrated in the larger camps. About 28% of campers attended the 12 largest camps (those with 1,000 or more campers). These largest camps had an average of 1,700 unique campers each. Another 53% of campers attend camps serving 400-999 campers; 18% were at camps with 100-399 campers and just 1% at the 21 smallest camps. The smallest camp that participated in the 2019 Census had 13 campers; the largest had 6,456.

**Wide variations in revenue size.** As seen previously, the wide variation in size of camp correlates to revenue. 28% of the 141 camps reporting revenue show a total revenue under $800,000 annually, with 40% reporting revenue between $800,000 and $2.5 million, and 33% reporting revenue over $2.5 million.

### Camps and Campers by Total Revenue

| | Number of Camps | Percent of Camps | Percent of Campers |
|---|---|---|---|
| Under $800,000 | 39 | 28% | 8% |
| $800,000 thru $2.5 million | 56 | 40% | 35% |
| $2.5 million or more | 46 | 33% | 57% |
| **TOTAL** | **141** | **100%*** | **100%** |

**These percentages have been rounded.*

**Movement affiliations.** Generally, the JCCA camps operate large, community-based camps, serving 29% of the total campers. Camps affiliated with the Association of Independent Jewish Camps (AIJC) accounted for 14% of the campers, camps affiliated with the Union for Reform Judaism (URJ) serve 13% of the campers, and camps with no affiliation serve 17% of the campers.

### Camps and Campers by Movement

| | Number of Camps Reporting | Percent of Camps | Percent of Campers |
|---|---|---|---|
| Orthodox | 13 | 8% | 9% |
| Ramah | 10 | 7% | 9% |
| URJ | 17 | 11% | 13% |
| Zionist | 8 | 5% | 2% |
| JCCA | 28 | 18% | 29% |
| Chabad | 12 | 8% | 3% |
| Young Judaea | 9 | 6% | 5% |
| AIJC | 19 | 12% | 14% |
| Other* | 37 | 24% | 17% |
| **TOTAL** | **153** | **100%** | **100%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

**Regional data suggests the concentration in the Northeast continues to hold steady.** As was the case in 2018, almost half of the camps and campers are in the Northeast and about a fifth of camps are found in the West. The South remains the region with the smallest number of camps and campers.

### Camps and Campers by Region

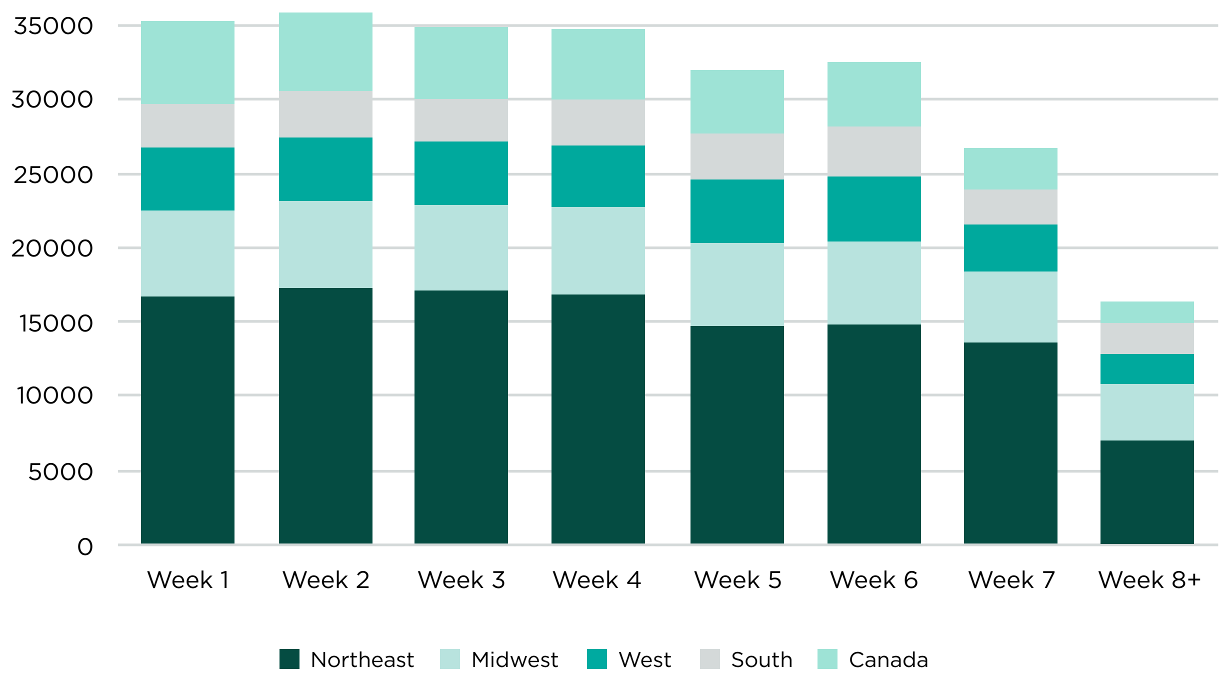
| | Number of Camps Reporting | Percent of Camps | Percent of Campers |
|---|---|---|---|
| Northeast | 66 | 43% | 47% |
| Midwest | 22 | 14% | 16% |
| West | 30 | 20% | 16% |
| South | 12 | 8% | 9% |
| Canada | 23 | 15% | 12% |
| **TOTAL** | **153** | **100%** | **100%** |

## BUSINESS MEASURES

On the 2019 Census, 150 camps reported their attendance on a weekly basis. These camps reported a total of 248,500 camper weeks sold, an average of 3.75 weeks per individual camper. Camps located in the Northeast accounted for 47% of individual campers enrolled over the summer of 2019, and for 48% of the total number of camper weeks that were sold. This is consistent with data showing that the Northeast serves 47% of all campers.

**Camps that experienced increased enrollment also increased the number of camper weeks sold.** And, most camps that experienced decreased enrollment also reported a decline in the number of camper weeks that had been sold.

**Total Number of Camper Weeks Sold**




Mid-size camps that served between 400 and 999 individual campers accounted for 60% of all of the camper weeks sold. These mid-size camps sold more than half of the camper weeks, which is consistent as they are the largest concentration of camps---serving 53% of campers. The largest camps, which served more than 1,000 individual campers, accounted for 19% of camper weeks.

Although the share of camper weeks sold by smaller camps dwindled over the course of the summer, the largest camps indicated uniformly strong attendance, accounting for nearly 30% of all camper weeks sold in the 8th week of the season.

### Camper Weeks by Size

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Total |
|---|---|---|---|---|---|---|---|---|---|
| < 100 | 945 | 925 | 783 | 494 | 84 | 46 | 26 | 26 | 3,329 |
| 100-399 | 7,786 | 7,356 | 7,252 | 6,824 | 6,143 | 6,322 | 3,707 | 1,591 | 46,981 |
| 400-999 | 20,599 | 21,075 | 20,530 | 20,888 | 19,571 | 19,953 | 17,537 | 9,981 | 150,134 |
| 1,000+ | 5,951 | 6,510 | 6,488 | 6,565 | 6,186 | 6,159 | 5,464 | 4,772 | 48,095 |
| **TOTAL** | **35,281** | **35,866** | **35,053** | **34,771** | **31,984** | **32,480** | **26,734** | **16,370** | **248,539** |

**Four-week sessions are most common.** As has been the trend in the last two years, the most common length of stay was a four-week stay---attended by 43% of campers overall in 2019. In camps located in the West, however, nearly twice as many campers enrolled for a two-week stay (42%) rather than a four-week stay (22%). There was also some variation by movement; half of campers at Zionist-affiliated camps enrolled for a three-week stay, and nearly half of AIJC-affiliated campers enrolled for a two-week or a three-week session.

### Lengths of Stay by Region

| | 1 week | 2 weeks | 3 weeks | 4 weeks | 5 weeks | 6 weeks | 7 weeks | 8+ weeks |
|---|---|---|---|---|---|---|---|---|
| Northeast | 3% | 12.9% | 13% | 44% | 2% | 2% | 16% | 8% |
| Midwest | 4% | 13.1% | 9% | 62% | 3% | 1% | 3% | 6% |
| West | 13% | 42% | 20% | 22% | 1% | 1% | 1% | 2% |
| South | 3% | 19% | 21% | 51% | 1% | 3% | 2% | 3% |
| Canada | 9% | 11% | 11% | 38% | 3% | 12% | 8% | 8% |
| **TOTAL AVERAGE** | **6%** | **18%** | **14%** | **43%** | **2%** | **3%** | **8%** | **6%** |

28% of camps reported that they sold more camper weeks in 2019 than in 2018, 20% of camps reported that they sold fewer camper weeks this year than last year, and 52% reported no change in the number of camper weeks sold. Not surprisingly, there is a strong relationship between capacity utilization and growth. There were 35 camps that reported to the 2018 Census that they were above 90% capacity for every term of operation. One third of camps that were not at full capacity in 2018 reported that they sold more camper weeks in 2019 than they had in 2018 and only 47% reported no change.

**Larger camps were less likely to see an increase.** In a reversal in the trend observed last year, larger camps were the least likely to report that they sold more camper weeks in 2019 than in 2018. Instead, about 30% of mid-sized camps, those with between 100 and 999 unique campers, reported that they sold more camper weeks in 2019 than they had in 2018.

### Change in the Number of Camper Weeks by Size

| | Number of Camps Reporting | Fewer Camper Weeks | No Change | More Camper Weeks |
|---|---|---|---|---|
| Under 100 | 20 | 15% | 65% | 20% |
| 100-399 | 56 | 25% | 46% | 29% |
| 400-999 | 65 | 15% | 52% | 32% |
| 1000+ | 12 | 25% | 58% | 17% |
| **TOTAL AVERAGE** | **153** | **20** | **52%** | **28%** |

**Growth varied by region.** Camps in the Midwest and in the West were more likely to report an increase in the number of camper weeks between 2018 and 2019. In contrast, camps located in the South were less likely to report an increase.

### Change in the Number of Camper Weeks by Region

| | Number of Camps Reporting | Fewer Camper Weeks | No Change | More Camper Weeks |
|---|---|---|---|---|
| Northeast | 66 | 20% | 55% | 26% |
| Midwest | 22 | 23% | 41% | 36% |
| West | 30 | 23% | 43% | 33% |
| South | 12 | 17% | 67% | 17% |
| Canada | 23 | 13% | 61% | 26% |
| **TOTAL AVERAGE** | **153** | **20%** | **52%** | **28%** |

**Trends in Overall Enrollment vs. Number of Camper Weeks Sold**

| | Number of Camps Selling More Camper Weeks | Number of Camps Reporting No Change | Number of Camps Selling Fewer Camper Weeks |
|---|---|---|---|
| Total Number of Campers Increased | 35 | 27 | 1 |
| No Change in Total Number of Campers | 3 | 21 | 2 |
| Total Number of Campers Decreased | 5 | 32 | 27 |

## RETURNING CAMPERS

**High proportion of returning campers.** 149 camps provided data detailing the number of returning campers. These camps shared that nearly three quarters of the population served had participated in previous summers. The proportion of returning campers was the highest in camps in the South (77%) and the lowest in camps in the West (69%). The proportion of returning campers is due to two factors: retention, the proportion of campers who have chosen to participate in camp again, and growth, the number of new campers that have enrolled for their first summer.

**Returning Campers by Region**

| | Number of Camps | Percent Returning Campers | Percent New Campers |
|---|---|---|---|
| Northeast | 63 | 70% | 30% |
| Midwest | 22 | 71% | 29% |
| West | 30 | 69% | 31% |
| South | 11 | 77% | 23% |
| Canada | 23 | 72% | 28% |
| **TOTAL AVERAGE** | **149** | **71%** | **29%** |

The data show that larger camps had a larger proportion of returning campers than smaller camps.

**Returning Campers by Size**

| | Number of Camps | Percent Returning Campers | Percent New Campers |
|---|---|---|---|
| Under 100 | 20 | 43% | 57% |
| 100-399 | 53 | 66% | 34% |
| 400-999 | 64 | 73% | 27% |
| 1000+ | 12 | 71% | 29% |
| **TOTAL AVERAGE** | **149** | **71%** | **29%** |

## CAPACITY UTILIZATION

**A third of camps are operating at full capacity.** Overall, 82% of available capacity was utilized. Almost every camp is in operation during the initial weeks of summer. By the 8th week, about one third of camps are hosting overnight campers. Nonetheless, at any given week over the summer, between 79% and 83% of the total available beds were occupied.

At any given week over the summer, between 32% and 39% of camps that were operating were operating at "full" (> 90%) capacity. Furthermore, 19% of the camps operated at full capacity for every week that they were in operation.

**Overall Capacity and Utilization**

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Full Term |
|---|---|---|---|---|---|---|---|---|---|
| Number of Camps | 147 | 147 | 141 | 135 | 124 | 123 | 94 | 56 | 150 |
| Number of Beds | 42,700 | 43,300 | 42,298 | 41,901 | 39,864 | 40,256 | 33,723 | 20,132 | 304,174 |
| Number of Campers | 35,281 | 35,866 | 35,053 | 34,771 | 31,984 | 32,480 | 26,734 | 16,370 | 248,539 |
| Avg. Capacity | 83% | 83% | 83% | 83% | 80% | 81% | 79% | 81% | 82% |
| >90% Cap | 39% | 38% | 36% | 37% | 32% | 34% | 32% | 36% | 19% |

The overall capacity utilization (the number of campers divided by the number of available beds) was 82%, averaged over all of the weeks for which each individual camp was in operation. Results of the 2019 Census confirmed the major trends that were identified last year. Average capacity utilization tends to be higher in larger camps than in smaller ones, and is higher earlier in the summer than it is towards the end of the summer.

### Average Capacity Utilization by Size

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Full Term |
|---|---|---|---|---|---|---|---|---|---|
| Under 100 | 72% | 71% | 67% | 64% | 38% | 35% | 32% | 32% | 66% |
| 100-399 | 75% | 74% | 74% | 72% | 69% | 69% | 63% | 63% | 71% |
| 400-999 | 86% | 87% | 86% | 86% | 84% | 84% | 82% | 85% | 85% |
| 1,000+ | 85% | 84% | 89% | 89% | 85% | 86% | 86% | 84% | 86% |
| **TOTAL AVERAGE** | **83%** | **83%** | **83%** | **83%** | **80%** | **81%** | **79%** | **81%** | **82%** |

**Not much variation in average capacity utilization from region to region.** Camps located in the West had an average capacity of only 74% over the course of the summer camping season, which is slightly less than the overall average.

### Average Capacity Utilization by Region

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Full Term |
|---|---|---|---|---|---|---|---|---|---|
| Northeast | 85% | 85% | 87% | 86% | 80% | 81% | 80% | 80% | 83% |
| Midwest | 82% | 83% | 83% | 85% | 87% | 87% | 86% | 82% | 84% |
| West | 71% | 70% | 72% | 75% | 76% | 79% | 76% | 75% | 74% |
| South | 77% | 79% | 77% | 76% | 84% | 86% | 86% | 88% | 81% |
| Canada | 90% | 89% | 85% | 84% | 75% | 71% | 65% | 86% | 81% |
| **TOTAL AVERAGE** | **83%** | **83%** | **83%** | **83%** | **80%** | **81%** | **79%** | **81%** | **82%** |

Although few of the camps located in the South reported that they had achieved a capacity utilization greater than 90% during the first four weeks, about one third of camps located in the South were operating at full capacity during the second half of their camping season.

### Percentage of Camps at Full (>90%) Capacity Utilization by Region

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Full Term |
|---|---|---|---|---|---|---|---|---|---|
| Northeast | 43% | 41% | 44% | 41% | 34% | 35% | 34% | 35% | 20% |
| Midwest | 41% | 46% | 36% | 43% | 41% | 41% | 40% | 33% | 23% |
| West | 20% | 17% | 19% | 20% | 25% | 33% | 25% | 27% | 13% |
| South | 0% | 9% | 10% | 9% | 30% | 30% | 33% | 40% | 9% |
| Canada | 68% | 64% | 48% | 55% | 25% | 29% | 23% | 60% | 26% |
| **TOTAL AVERAGE** | **39%** | **38%** | **36%** | **37%** | **32%** | **34%** | **32%** | **36%** | **19%** |

There is quite a bit of variation between camping movements. More than half of the Chabad affiliated camps operated at full capacity utilization (>90% capacity) for every week that they were in operation over their camping season.

### Percentage of Camps at Full (>90%) Capacity Utilization by Movement

| | 1st Week | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th+ | Full Term |
|---|---|---|---|---|---|---|---|---|---|
| Orthodox | 83% | 75% | 75% | 75% | 25% | 25% | 29% | 33% | 42% |
| Ramah | 50% | 50% | 50% | 50% | 50% | 50% | 38% | 29% | 20% |
| URJ | 25% | 29% | 25% | 29% | 27% | 38% | 11% | 0% | 6% |
| Zionist | 13% | 13% | 0% | 0% | 14% | 0% | 0% | -- | 0% |
| JCCA | 30% | 19% | 16% | 24% | 38% | 42% | 36% | 31% | 11% |
| Chabad | 55% | 50% | 56% | 57% | 80% | 80% | 80% | 80% | 55% |
| Young Judaea | 38% | 44% | 50% | 44% | 38% | 44% | 33% | 33% | 22% |
| AIJC | 39% | 44% | 42% | 33% | 22% | 29% | 40% | 33% | 11% |
| Other* | 35% | 38% | 35% | 36% | 24% | 22% | 24% | 42% | 22% |
| **TOTAL AVERAGE** | **39%** | **38%** | **36%** | **37%** | **32%** | **34%** | **32%** | **36%** | **19%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

**Bunks as the most common limiting factor to capacity growth.** Camp professionals were asked to describe the primary factor that limits their capacity growth. Among the camp professionals who did specify factors that do limit their capacity, the most common was the number of bunks available (29%), followed by the size of the dining hall (13%) and insufficient program or activity space to serve more campers at a given time (11%). 31% of camp directors reported that their current size is what works best for their camp community, with some elaborating further: "We like the size we are at", "We believe our size is part of our product", and "We're still growing, so we're not yet hitting up against capacity issues."

**Capacity Limitations by Size**

| | None | Bunks | Dining | Space | Facility | Camper Enrollment | Staff | Other |
|---|---|---|---|---|---|---|---|---|
| Under 100 | 35% | 30% | 0% | 20% | 5% | 0% | 5% | 5% |
| 100-399 | 30% | 23% | 16% | 5% | 9% | 11% | 7% | 5% |
| 400-999 | 29% | 34% | 14% | 14% | 6% | 3% | 5% | 3% |
| 1,000+ | 33% | 33% | 17% | 8% | 0% | 8% | 0% | 8% |
| **TOTAL AVERAGE** | **31%** | **29%** | **13%** | **11%** | **7%** | **6%** | **5%** | **5%** |

## CAMPER IDENTITY

**Variation between movements on campers who identify as Jewish, and/or from interfaith or multi-faith families.** The questionnaire asked to identify a percentage range of campers who identified as Jewish, and those that identify as coming from interfaith or multi-faith family homes (where Jewish is defined according to the camp). Only camps that are specifically tracking such data were invited to share percentages of their campers who identify as Jewish or come from interfaith or multi-faith homes.

Only 37% of camps reported that they collect data on campers' religious identities. This was a somewhat smaller percentage than the 43% of camps who reported that they track this data in 2018.  Even fewer camps, only 19%, track if their campers come from interfaith or multi-faith homes. As expected, there was considerable variation between movements.

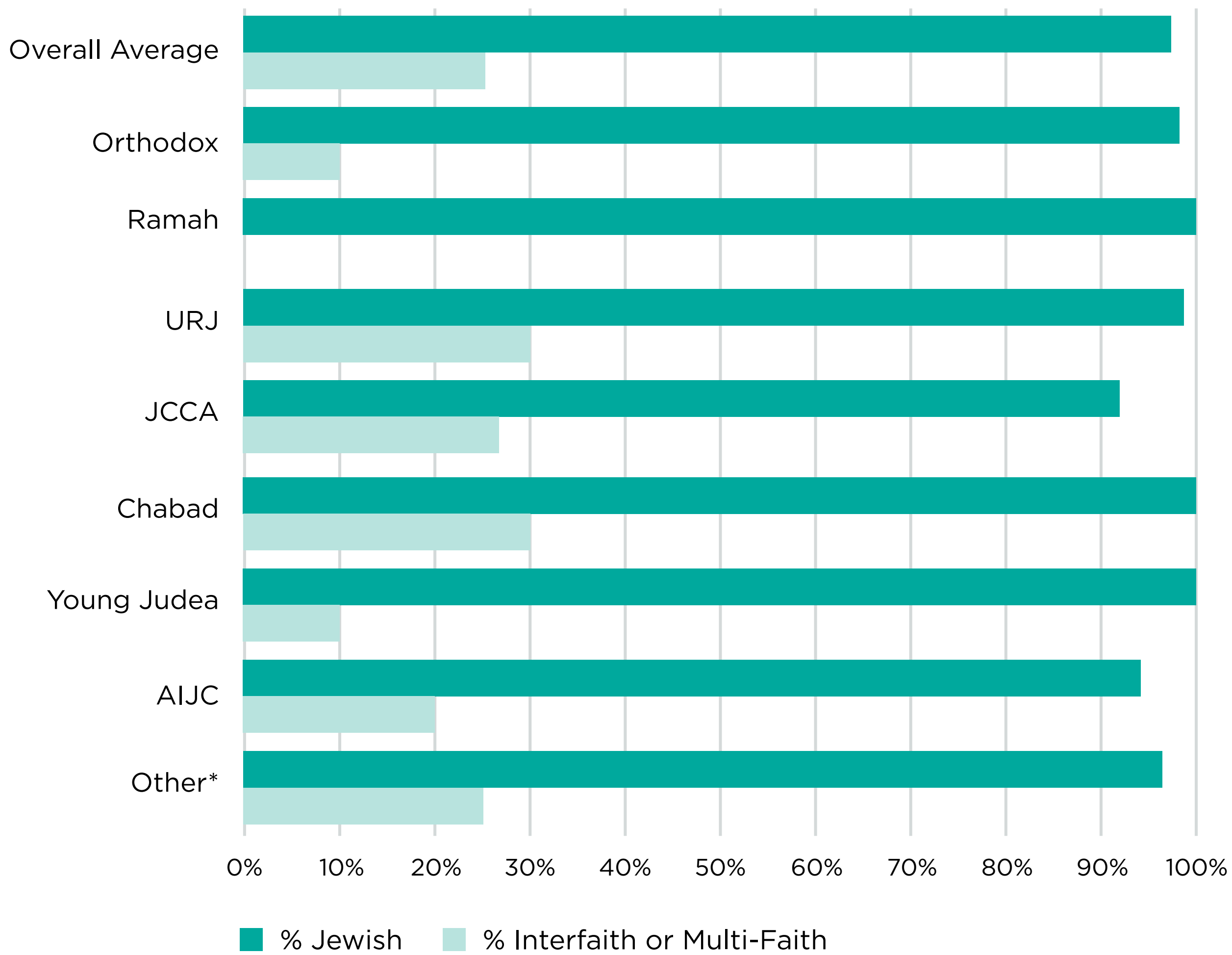
### Percentage of Camps that Collect Religious Identity Data

| | Number of Camps Reporting | Percent That Collect Data on Campers' Religious Identities | Percent That Collect Inter-faith or Multi-Faith Data |
|---|---|---|---|
| Orthodox | 13 | 38% | 8% |
| Ramah | 10 | 80% | 0% |
| URJ | 17 | 76% | 59% |
| Zionist | 8 | 0% | 0% |
| JCCA | 28 | 21% | 21% |
| Chabad | 12 | 25% | 17% |
| Young Judaea | 9 | 33% | 33% |
| AIJC | 19 | 26% | 5% |
| Other* | 37 | 35% | 16% |
| **TOTAL AVERAGE** | **153** | **37%** | **19%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

At those camps that collect data on the religious identities of their campers, almost all campers (97%) were identified as Jewish. Although there was some variation by camping movement, the proportion of campers who were identified as Jewish was always high, ranging from 92% among camps affiliated with the JCCA, and up to 100% for several other camping movements. At those camps (20% of camps) that track this data, we estimate that 25% of campers come from interfaith or multi-faith homes.

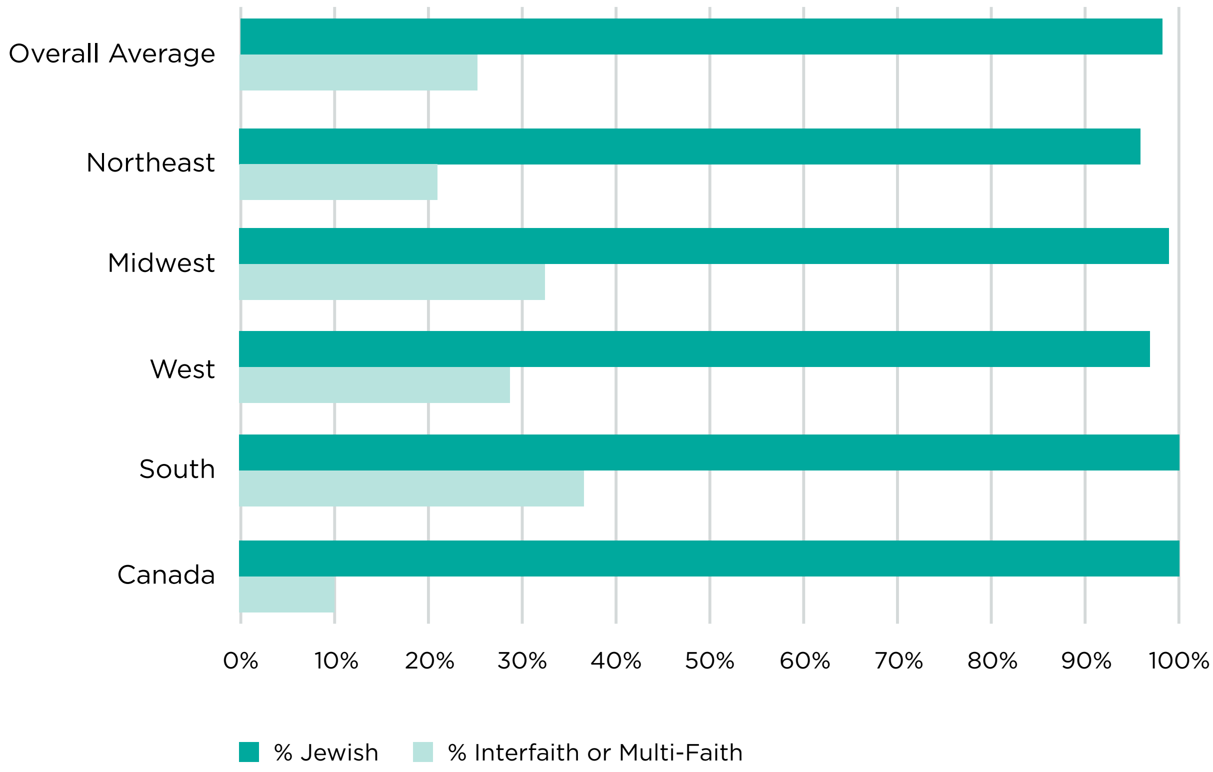
**Percentage of Campers Identified as Jewish and as Interfaith or Multi-Faith by Movement**




**Other = Traditional, Secular, Sephardic & Reconstructing*

The proportion of campers from interfaith or multi-faith homes is lower in camps in Canada (10%) and in the Northeast (21%), and highest in South (37%), similar to the findings of the 2018 Census. Additionally, in *The 2013 Pew Study: A Portrait of Jewish Life,* we find that among respondents identifying as Jewish with children ages 10-17, interfaith or multi-faith homes with one Jewish parent occurred with a frequency of 28% in the East and 30% in the Midwest, but 57% in the South and 58% in the West. The regional contours in the Pew Study's interfaith marriage rates more or less parallel the regional variations in children of interfaith marriage in the 2019 camper population.

**Percentage of Campers Identified as Jewish and as Interfaith or Multi-Faith by Region**




In 2019, we had insufficient data to track racial identity among campers, but we aim to be able to report this data in the future.

## CAMPERS BY GRADE

**Concentration of sixth through ninth graders at camp.** The 2019 Census collected data on the number of overnight campers at each grade level (the grade that they are entering following camp). Campers ranged from 1st-graders to beyond 12th graders. The median grade level was the 7th grade, and 7th grade was also the grade with the largest share of overnight campers overall, representing 13.6% of the overnight camping population.

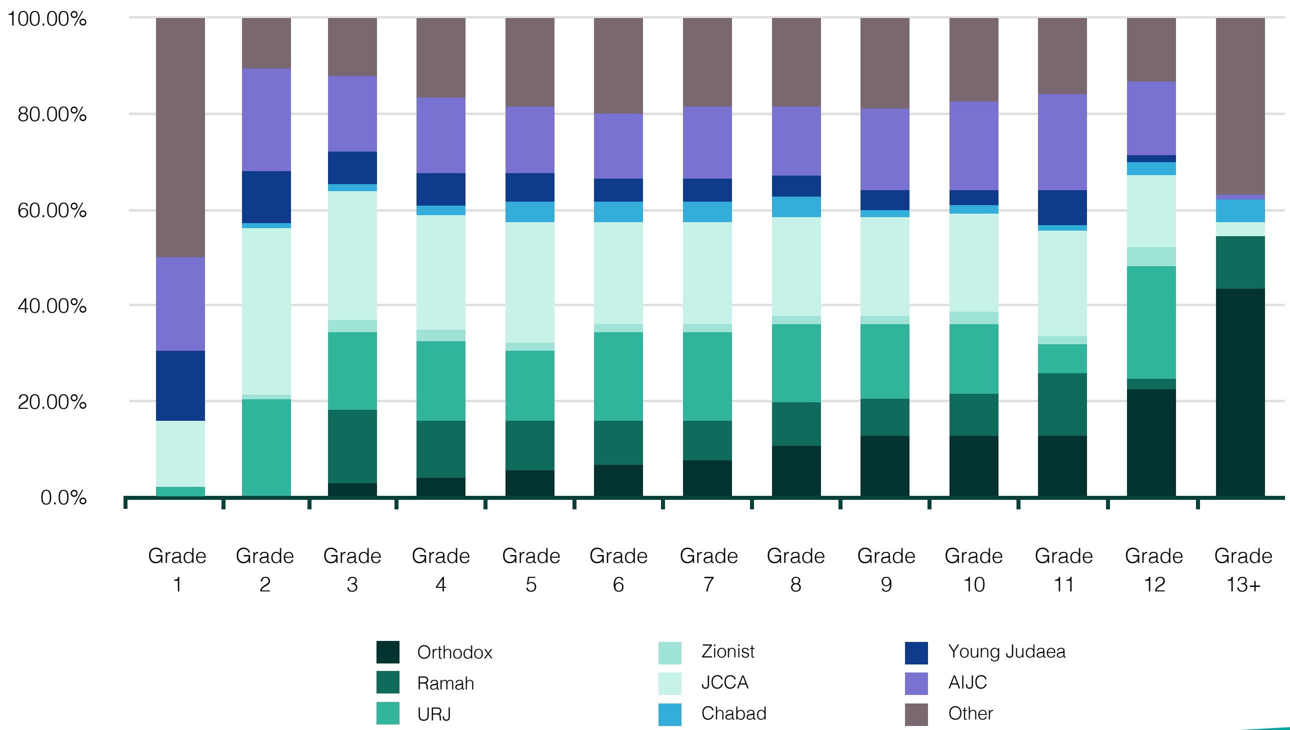
**Breakdown of Overnight Campers by Grade Level**

| | Percent of Campers |
|---|---|
| Grade 1 | 0% |
| Grade 2 | 2% |
| Grade 3 | 5% |
| Grade 4 | 8% |
| Grade 5 | 12% |
| Grade 6 | 13% |
| Grade 7 | 14% |
| Grade 8 | 13% |
| Grade 9 | 13% |
| Grade 10 | 11% |
| Grade 11 | 6% |
| Grade 12 | 3% |
| Grade 13+ | 1% |
| **TOTAL** | **100%*** |

*These percentages have been rounded.*

There are differences in the distribution of campers by age between movements as well, as illustrated below. For example, the JCCA accounts for a much larger share of campers in the lower grades than it does in the higher grades. Camps in Orthodox movements show the reverse trend, representing a small fraction of campers in the lower grades, but accounting for 22% of all 12th-graders and 44% of campers beyond 12th grade.

**Overnight Campers by Grade by Movement (Population Share)**



## TEEN PROGRAMS

We define “teens” as rising 8th graders up through rising 12th graders. These campers comprise 46% of overnight campers and the distribution of campers by age differs by region and movement. Teens account for half of campers in camps in the Northeast, but for only

**Teens by Region**

| | Number of Camps | Proportion of Teens (Compared to All Other Campers) | Percent of All Campers | Percent of Teens |
|---|---|---|---|---|
| Northeast | 65 | 50% | 42% | 45% |
| Midwest | 22 | 48% | 17% | 18% |
| West | 30 | 38% | 17% | 15% |
| South | 12 | 42% | 10% | 9% |
| Canada | 23 | 45% | 13% | 13% |
| **TOTAL** | **152** | **46%** | **100**%* | **100**%* |

**These percentages have been rounded.*

**CIT/LIT/SIT/MIT numbers haven’t changed since 2018.** In 2019, there were 3,708 CIT/LIT/SIT/MIT (“CIT program”) participants at 110 camps, virtually unchanged from 2018. Only 43 of the 66 camps in the Northeast has a CIT program in place with 62% of teens in the Northeast attend an overnight camp with a CIT program. This means that although half of all teens attend summer camps in the Northeast, many of these teens do not have access to a CIT program. In contrast, although teens comprise a relatively smaller share of campers in the South, almost every teen in the South is attending a camp with a CIT program.

### CIT/LIT/SIT/MIT Participants by Region

| | Number of Camps with CIT Program | Total Participants | Percent of Teens with CIT Access* |
|---|---|---|---|
| Northeast | 43 | 1,535 | 62% |
| Midwest | 16 | 466 | 62% |
| West | 22 | 477 | 78% |
| South | 10 | 420 | 98% |
| Canada | 19 | 810 | 85% |
| **TOTAL** | **110** | **3,708** | **71%** |

**These statistics are compiled using grade level data from above.*

Overall, 71% of all teen campers attended a camp with a CIT Program. This proportion is much higher in camps affiliated with Zionist camps, the JCCA, or the URJ, where all or almost all teens at overnight camps are attending a camp with a CIT program. Of the 110 camps with CIT programs, only 18 camps report that their program offers a stipend to participants.

### CIT/LIT/SIT/MIT Participants by Movement

| | Number of Camps with CIT Program | Total Participants | Percent of Teens with CIT Access |
|---|---|---|---|
| Orthodox | 4 | 242 | 32% |
| Ramah | 7 | 337 | 70% |
| URJ | 15 | 459 | 96% |
| Zionist | 8 | 114 | 100% |
| JCCA | 25 | 938 | 94% |
| Chabad | 4 | 64 | 44% |
| Young Judaea | 7 | 256 | 67% |
| AIJC | 18 | 657 | 75% |
| Other* | 22 | 641 | 50% |
| **TOTAL** | **110** | **3,708** | **71%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

## CAMPERS WITH DISABILITES

**Serving children with disabilities.** In 2019, FJC defined campers with disabilities to include individuals with intellectual, developmental, physical and/or sensory disabilities. Examples might be campers with Autism Spectrum Disorders, Asperger's syndrome, blindness, Down syndrome, hearing impairments, seizures, and other physical disabilities. This could include campers with ADHD only if they require extra staff support or accommodations to be successful at camp. It did not include campers who function independently and require no additional support or modifications from camp, or campers whose challenges are limited to daily/weekly medications, food allergies, or special diets.

As per the new definition of campers with disabilities, a total of 3,744 campers with disabilities were served, or 4.6% of the total number of campers.

Of the 3,744 children with disabilities served in the summer 2019, 70% of these children attended one of the 42 camps in the Northeast that offer partial or full inclusion for children with disabilities. Even in the Northeast, which serves a relatively larger proportion of campers with disabilities than any other region, the proportion of campers with disabilities is still far below the percent of children with disabilities in the Jewish population, which is estimated to be 15-20%.

**Camps Serving Campers with Disabilities by Region**

| | Number of Camps Serving Campers with Disabilities | Percent of Campers with Disabilities |
|---|---|---|
| Northeast | 42 | 8% |
| Midwest | 14 | 3% |
| West | 18 | 4% |
| South | 11 | 3% |
| Canada | 12 | 1% |
| **TOTAL** | **97** | **5**% |

Examining inclusion by movement showed that Orthodox camps had the highest rate of inclusion of children with disabilities --- almost 10% of campers. These statistics are highly influenced by the handful of Orthodox camps that are fully devoted to servicing campers with disabilities. The inclusion rate for camps with "Other" or no affiliation is also very high, and is driven by just a few camps that primarily serve campers with disabilities.

**Camps Serving Campers with Disabilities by Movement**

| | Number of Camps Reporting | Number Camps Serving Campers with Disabilities | Percent of Campers with Disabilities | Number of Campers with Disabilities | Number of Camps that Have an Inclusion Coordinator |
|---|---|---|---|---|---|
| Orthodox | 13 | 7 | 8% | 532 | 5 |
| Ramah | 10 | 9 | 5% | 290 | 8 |
| URJ | 17 | 12 | 6% | 617 | 10 |
| Zionist | 8 | 5 | 2% | 29 | 2 |
| JCCA | 28 | 18 | 3% | 663 | 14 |
| Chabad | 12 | 7 | 1% | 25 | 0 |
| Young Judaea | 9 | 2 | 2% | 63 | 1 |
| AIJC | 19 | 14 | 2% | 221 | 11 |
| Other* | 37 | 23 | 11% | 1,304 | 10 |
| **TOTAL AVERAGE** | **153** | **97** | **5%** | **3,744** | **61** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

Among the camps that serve campers with disabilities, there were 61 that reported that they have an inclusion coordinator and 21 that have a vocational program. Almost all of the camps that reported that they have a vocational program also have an inclusion coordinator. A total of 56 camps reported that they were partially wheelchair accessible.

The 2019 Census endeavored to determine rates of inclusion for staff with disabilities in addition to campers. Only 41 camps provided data for both groups. Of these camps, less than 2% of their staff had disabilities, which is less than one third of the inclusion rate of campers with disabilities.

### Staff with Disabilities by Region

| | Number of Camps | Percent of Staff with Disabilities | Percent of Campers with Disabilities |
|---|---|---|---|
| Northeast | 15 | 2% | 9% |
| Midwest | 7 | 1% | 4% |
| West | 9 | 2% | 4% |
| South | 2 | 3% | 1% |
| Canada | 8 | 3% | 3% |
| **TOTAL AVERAGE** | **41** | **2**% | **6**% |

## STAFF

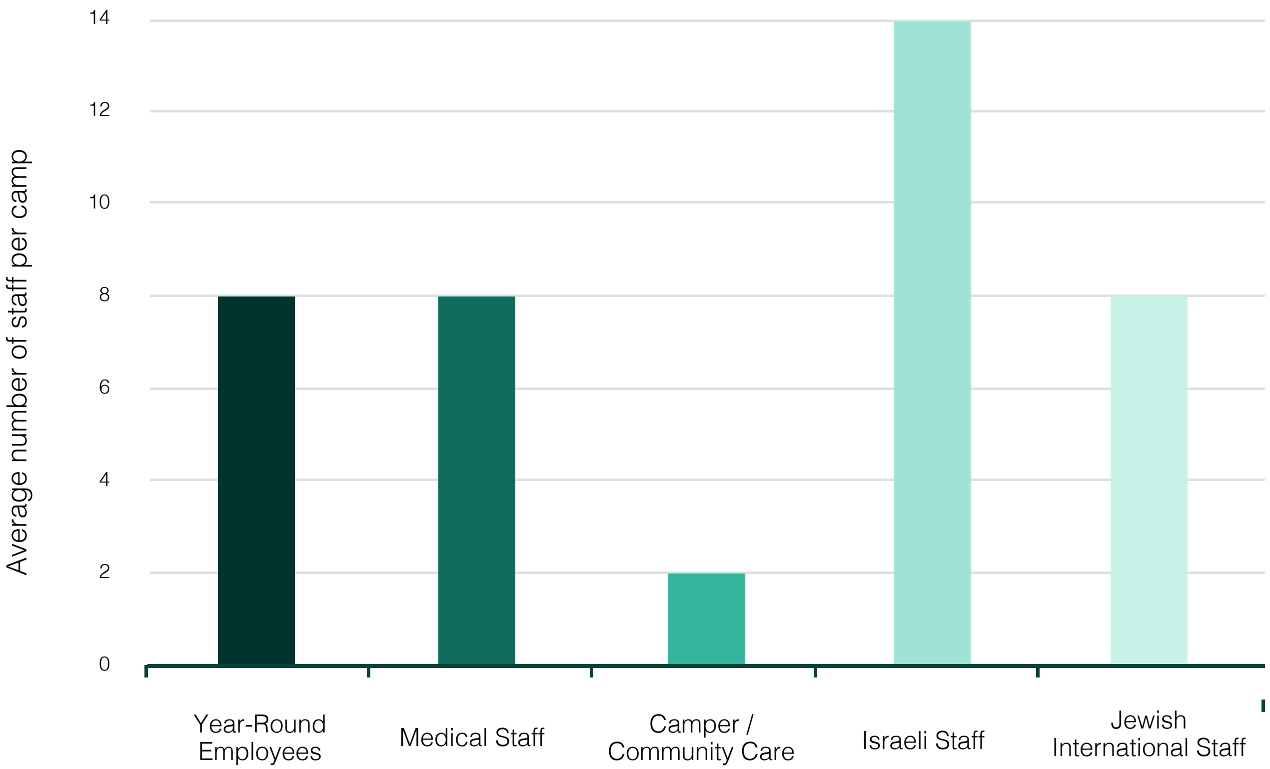
**Thousands of staff members throughout North America.** The 153 responding camps employ 1,279 year-round staff and more than 23,953 summer-only paid staff which includes over 13,000 college-age counselors. The 2019 total of 25,237 staff members is about 2% higher than the number of staff reported by 159 participating camps in 2018. Data shows an average ratio of 3 campers to each staff member, slightly lower than the 2018 campers-to-staff ratio.

### Camper-to-Staff Ratios by Region

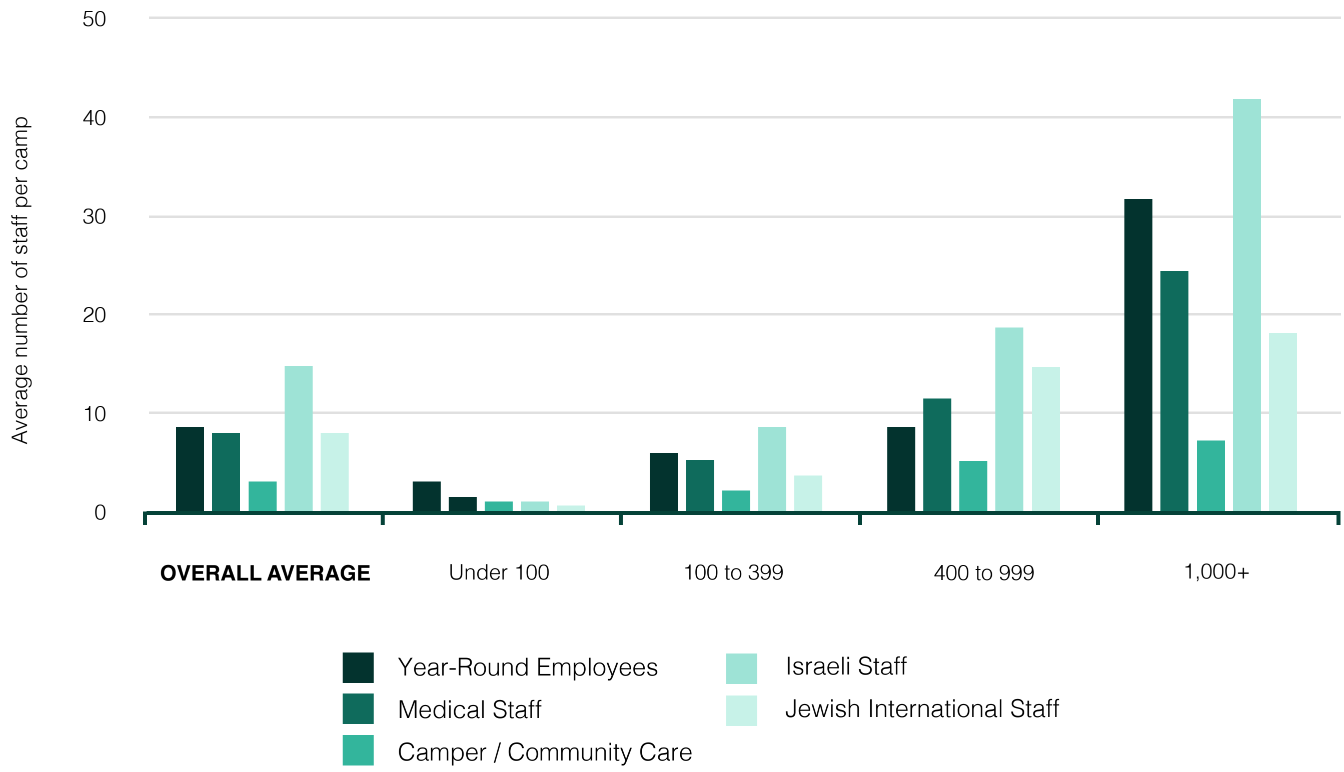
| | Number of Camps Reporting | Camper-to-Staff Ratio | Number of Staff |
|---|---|---|---|
| Northeast | 66 | 3 | 13,392 |
| Midwest | 22 | 3 | 4,336 |
| West | 30 | 4 | 2,880 |
| South | 12 | 3 | 2,017 |
| Canada | 23 | 3 | 2,607 |
| **TOTAL** | **153** | **3** | **25,232** |

On average, camps employ about eight full-time professionals, higher than last year's average of seven. An average of 5% of summer staff are medical professionals, and 1% are designated as camper care staff (defined more narrowly as only psychologists, social workers, and mental health professionals). About 5% of camp staff are Jewish international staff (not including Israeli staff), but that percentage is concentrated at about three-fifths of camps; two-fifths of camps (43%) did not report any of this type of staff. About 9% of camp staff are Israeli staff, although about one fifth (18%) of the camps that responded to the survey have no Israeli staff at all.

**Average Number of Staff Per Camp**



## Average Number of Staff Per Camp by Size




**Retaining 60%-70% of college-age counselors.** The 153 reporting overnight camps employed over 13,000 college-age counselors, an average of 86 college-age counselors per camp and an increase 6% from the number employed last year.

Slightly more than three-quarters of camps reported that more than 70% of their college-age counselors were eligible to return to staff, which is very similar to the findings from the 2018 Census. Out of the pool of college-aged counselors who were eligible to return, the median range of college-age counselors who actually did return was 60% to 70%. The rate of return was lower in the smallest camps; the median rate of return for camps with fewer than 100 campers was less than 50%.

The return rates of college-age counselors varied dramatically across movements. For example, all Young Judaea camps reported that at least 70% of their college-age counselors were eligible to return for a second year.  In contrast, only five of the twelve Chabad-affiliated camps reported that they had at least 70% of their eligible college-age counselors return. The median return rate of eligible college-age counselors at the Young Judaea camps was 80% to 90%. In contrast, the median return rate of eligible college-age counselors at the Chabad camps was less than 50%; the majority of Chabad camps reported that fewer than half of their eligible college-age counselors from 2018 returned as counselors in 2019.

## College-Age Counselors by Movement

| | Number of Counselors | Average Counselors per Camp | Percent of Camps with Less than 70% Eligible to Return | Percent of Eligible who Actually Returned |
|---|---|---|---|---|
| Orthodox | 1,455 | 121 | 75% | <50% |
| Ramah | 1,294 | 129 | 80% | 60%-70% |
| URJ | 1,485 | 87 | 82% | 60%-70% |
| Zionist | 329 | 41 | 75% | 70%-80% |
| JCCA | 2,981 | 106 | 86% | 60%-70% |
| Chabad | 374 | 31 | 42% | <50% |
| Young Judaea | 661 | 73 | 100% | 80%-90% |
| AIJC | 1,703 | 90 | 84% | 60%-70% |
| Other* | 2,857 | 77 | 73% | 60%-70% |
| **TOTAL AVERAGE** | **13,139** | **86** | **78%** | **60%-70%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

The 2019 Census only asked about religious identity of summer staff when a camp shared that they are specifically tracking that information. Only 30% of responding camps reported that they track the religious identities of summer staff (in 2018, 40% of respondents reported that they track this data.) Data shows that 91% of summer staff at these camps identify as Jewish.

There are some differences in percentages of staff who identify as Jewish between camps affiliated with different movements. Among camps affiliated with the URJ, approximately 79% of summer staff identify as Jewish. Among Chabad-affiliated camps, nearly 100% of summer staff identify as Jewish.

**Counselor salaries widely varied.** The 2019 Census collected more detailed salary data than had been collected on previous iterations of the Census. Each camp was asked to report the lowest and the highest **weekly** salaries that they paid to staff with various levels of experience: first-year staff, second-year staff, third-year staff, and staff with four or more years of experience. The median value of the reported lowest weekly salaries for first year staff was $150; this is comparable to the median overall lowest salary reported in 2018, which was $180. The median highest weekly salary paid for staff with four or more years of experience was $420.

**Counselor Salaries by Region (USD)**

| | Number of Camps | Average Number of Weeks Worked | 1st-Year Staff Salary Ranges (Low/High) | 2nd-Year Staff Salary Ranges (Low/High) | 3rd-Year Staff Salary Ranges (Low/High) | 4th-Year + Salary Ranges (Low/High) |
|---|---|---|---|---|---|---|
| Northeast | 60 | 7 | 160/250 | 220/280 | 230/350 | 300/430 |
| Midwest | 21 | 7 | 190/220 | 210/230 | 230/260 | 250/480 |
| West | 30 | 7 | 220/260 | 240/300 | 240/310 | 260/400 |
| South | 12 | 8 | 150/270 | 200/280 | 250/310 | 290/350 |
| Canada | 23 | 6 | 80/100 | 110/150 | 150/210 | 210/380 |
| **TOTAL** | **146** | **7** | **150/230** | **200/260** | **220/290** | **270/420** |

Salary statistics differ by region. The highest salary levels for 1st year staff were reported by camps operating in the West. Among these camps, the median lowest salary for 1st year staff was $220 and the median highest salary was $260. The lowest weekly salary levels for 1st year staff were reported by Canadian camps, for which the corresponding medians of the lowest and highest weekly salaries were equivalent to $80 and $100. The average length of employment for summer camp employees also differs by region. The longest terms of employment were in the South, where summer employees worked for an average of 7.9 weeks. The shortest durations of employment were in Canada and the Northwest, where the average length of employment was 6.4 weeks and 6.5 weeks, respectively.

## CAMP TUITION

**Tuition remained the largest component of revenue (an average of 75%).** Tuition is a larger than average proportion of revenue at camps in the Northeast and in the South. Tuition is a lower percentage of revenue at camps in the West. This difference may be attributed to camping being a relatively newer phenomenon in the West with more new camps. These partially new camps, such as the 7 specialty camps in the West, offer more subsidies to incentivize enrollment.

**Tuition as a Proportion of Total Camp Revenue by Region**

| | Number of Camps Reporting | Average Total Camp Revenue | Average Total Tuition | Tuition as Percent of Revenue |
|---|---|---|---|---|
| Northeast | 37 | 2,813,066 | 2,277,372 | 81% |
| Midwest | 17 | 3,027,058 | 2,218,002 | 73% |
| West | 22 | 2,249,129 | 1,434,419 | 64% |
| South | 9 | 3,803,341 | 3,020,072 | 79% |
| Canada | 11 | 1,548,581 | 1,160,930 | 75% |
| **TOTAL** | **96** | **2,669,674** | **2,015,385** | **75%** |

# TUITION AND FINANCIAL AID

**The average maximum weekly tuition is about $1,200,** which is slightly lower than the 2018 average ($1,300); the slight decrease from last year is because of improved data and not a reflection of a trend. There is little difference between camps of different sizes, but there is some variation between camps affiliated with different camping movements and between geographical regions.

**Financial aid – more need in smaller camps.** Respondents were asked to report the number of campers who requested and received financial aid (excluding One Happy Camper® incentive grants). Overall, 20,170 campers, or about 31% of campers, requested assistance. This is almost a 7% increase over the 18,935 individuals who requested aid in 2018. In 2019, 20,108 individual campers received aid, meaning that nearly all who request aid received it. Some camps provided aid to more individuals than requested aid.

The percent "of need" (i.e., the fraction of campers requesting aid) is more than double in the smallest camps as in the largest camps.

**Tuition and Financial Aid by Revenue**

| | Number of Camps | Average Summer 2019 Core Program Maximum Weekly Tuition | Percent of Campers Requesting Assistance | Percent of Requests who Received Assistance |
|---|---|---|---|---|
| Under $800,000 | 39 | 1,100 | 43% | 101% |
| $800,000 thru $2.5 million | 56 | 1,300 | 34% | 94% |
| $2.5 million or more | 45 | 1,300 | 29% | 104% |
| **TOTAL AVERAGE** | **140** | **1,200** | **32%** | **100%** |

Of all the movement camps, need levels are highest for Chabad. In these camps, 74% of campers requested aid, and 96% of those that requested aid received it. In contrast, Young Judaea is at the low end of the spectrum where 21% of campers requested aid. There are several movements in which the number of aid recipients exceeded the number of aid requests. The 17 URJ camps received a total of 3,612 requests for aid; yet, these camps reported that they provided aid to 3,769 individual campers.

**Tuition and Financial Aid by Movement**

| | Number of Camps | Summer 2019 Core Program Maximum Weekly Tuition | Percent of Campers Requesting Assistance | Percent of Requests who Received Assistance |
|---|---|---|---|---|
| Orthodox | 12 | 1,000 | 30% | 102% |
| Ramah | 10 | 1,300 | 35% | 97% |
| URJ | 17 | 1,400 | 38% | 104% |
| Zionist | 7 | 1,200 | 27% | 107% |
| JCCA | 27 | 1,300 | 22% | 96% |
| Chabad | 11 | 800 | 74% | 96% |
| Young Judaea | 9 | 1,200 | 21% | 94% |
| AIJC | 18 | 1,300 | 29% | 100% |
| Other* | 35 | 1,300 | 35% | 100% |
| **TOTAL AVERAGE** | **146** | **1,200** | **31%** | **100%** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

Geographically, need levels are lower in the Northeast than in all other regions. Notably, the number of campers who received aid exceeded the number of applications by 7% in camps in the South. This was a departure from the findings of the 2018 Census, which indicated that only 84% of aid applications were granted in camps in Southern states in 2018.

## FAMILY CAMP

**Among the camps that participated in the 2019 Census, a little less than half of camps operate a "Family Camp" (70).** Most of the overnight camps that operate a family camp only offer one family camp session per year, but several offer more. Most of the family camps occur in the summer (before and after typical camper sessions), but 19 of the 70 camps that operate family camps offer sessions in multiple seasons or year-round. Overnight camps affiliated with the JCCA operate about one third of the family camps and a high number of year-round programs.

## Family Camps by Region

| | Number of Camps Hosting Family Camps | Number of Family Camp Sessions Per Year |
|---|---|---|
| Northeast | 23 | 286 |
| Midwest | 12 | 180 |
| West | 17 | 44 |
| South | 8 | 15 |
| Canada | 10 | 27 |
| **TOTAL** | 70 | 552 |

## Family Camps by Movement

| | Number of Camps Hosting Family Camps | Number of Family Camp Sessions Per Year |
|---|---|---|
| Orthodox | 2 | 2 |
| Ramah | 7 | 16 |
| URJ | 9 | 18 |
| Zionist | 5 | 26 |
| JCCA | 23 | 419 |
| Chabad | 1 | 4 |
| Young Judaea | 3 | 5 |
| AIJC | 10 | 52 |
| Other* | 10 | 10 |
| **TOTAL** | **70** | **552** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

**Camp directors who operate a family camp gave a very wide range of definitions for their target audience,** ranging from some very specific groups to “anyone who wants to”. Almost all of the overnight camps that operate a family camp consider current camp families to be one of the primary target audiences of family camp. Camp alumni and their families are also a very common target audience. Many family camps focus on attracting local community members and families from synagogues in their area. About 20 camps indicate that they focus specifically on targeting “Future Campers”. Some camp directors named very specific communities or target audiences that they seek to include in family camp, including Israeli families, Russian Jewish families, families with special needs, families with children with disabilities, and families with a member or multiple members who identify as LGBTQ.

## Family Camp Target Audience by Movement

| | Number of Camps Hosting Family Camps | Number of Camps Targeting Current Camp Families | Number of Camps Targeting Alumni | Number of Camps Targeting Local Synagogues | Number of Camps Targeting Future Campers | Number of Camps Targeting Community Members | Number of Camps Targeting Other Specific Groups |
|---|---|---|---|---|---|---|---|
| Orthodox | 2 | 2 | 1 | 0 | 0 | 0 | 0 |
| Ramah | 7 | 5 | 5 | 6 | 1 | 4 | 2 |
| URJ | 9 | 7 | 6 | 5 | 2 | 1 | 0 |
| Zionist | 5 | 2 | 2 | 1 | 4 | 2 | 2 |
| JCCA | 23 | 21 | 19 | 8 | 6 | 2 | 4 |
| Chabad | 1 | 1 | 1 | 0 | 0 | 1 | 0 |
| Young Judaea | 3 | 3 | 3 | 2 | 0 | 1 | 0 |
| AIJC | 10 | 10 | 7 | 4 | 5 | 3 | 1 |
| Other* | 10 | 9 | 5 | 4 | 2 | 2 | 3 |
| **TOTAL AVERAGE** | **70** | **60** | **49** | **30** | **20** | **12** | **12** |

**Other = Traditional, Secular, Sephardic & Reconstructing*

The 83 camp directors who do not currently operate a family camp were asked "Is your camp interested in starting to offer family camp programming?" Of the 83 camp directors who do not currently operate a family camp, 31 expressed an interest to start to offer one. Those who were interested in starting this offering seemed about equally interested in three potential target audiences: current camp families, families of camp alumni, and other community members outside of their camp families.

## Potential Interest in Family Camp by Region

| | Number of Camps Reporting | Number of Camps Hosting Family Camps | Number of Camps Without Family Camps | Number of Camps Interested in Starting Family Camps | Number of Camps Targeting Current Camp Families | Number of Camps Targeting Alumni | Number of Camps Targeting Others |
|---|---|---|---|---|---|---|---|
| Northeast | 66 | 23 | 43 | 12 | 9 | 9 | 9 |
| Midwest | 22 | 12 | 10 | 5 | 5 | 4 | 5 |
| West | 30 | 17 | 13 | 6 | 6 | 4 | 4 |
| South | 12 | 8 | 4 | 2 | 1 | 1 | 1 |
| Canada | 23 | 10 | 13 | 6 | 4 | 6 | 3 |
| **TOTAL** | **153** | **70** | **83** | **31** | **25** | **24** | **22** |

# ABOUT THE LEAD CONTRIBUTORS

**Marci Soifer** is the Director of Operations at Foundation for Jewish Camp. Since 2015, Marci has helped operationalize strategic initiatives and manages organization-wide data collection and analysis, including management of FJC's Salesforce platform, Satisfaction Insight surveys, Camp Census, and program evaluations. Marci earned a dual-masters degree in non-profit management (M.P.A.) and Hebrew and Judaic studies (M.A.) from New York University. Her love for camp came from her 19 summers with Young Judaea, several years as the Assistant Camp Director at Camp Young Judaea Sprout Lake, and participation in FJC's Yitro Program (cohort 1). Before joining the FJC team, Marci worked as the Director of Operations and Planning at NEXT: A Division of Birthright Israel Foundation, managing national projects, strategic operations, and program evaluation.

**Glenn Stark** is the founder and owner of Stark Statistical Consulting and specializes in statistical consulting with a focus on healthcare and education. Glenn began his consulting career as a pharmaceutical market research consultant in China in 1998. Since that time he has been collecting and analyzing data or he has been teaching statistics. Prior to founding Stark Statistical Consulting, Glenn worked as a consultant for GfK, NOP World Health, and Strategic Marketing Asia and supported academic research as a statistical consultant at the University of New Mexico.

Some of the fields that Glenn has most recently contributed to as a statistical consultant include language learning and acquisition, healthcare market research, and the impacts of smartphone overuse and addiction. Glenn holds a MS in Statistics from the University of New Mexico, a MA in East Asian Studies from Stanford University, and a BA in Mathematics from the University of New Mexico.  He is a contributor to "Bayesian Theory and Applications", P. Damien, et. al., eds, Oxford University Press.

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# ABOUT THE FOUNDATION FOR JEWISH CAMP

The key to the Jewish future is Jewish camp. We know from research – and nearly two decades' experience – that this is where young people find Jewish role models and create enduring Jewish friendships. It's where they forge a vital, lifelong connection to their essential Jewishness.

Suddenly, all those Shabbat song sessions and campfire stories take on new importance – and urgency. So we're devoted to helping Jewish camps and summer programs thrive. We gather data, build new programs, provide operational support and help recruit campers. We've elevated camp management into a true profession. And we work to elevate Jewish camp on the cultural and philanthropic agenda.

In short, our mission is to help Jewish camps achieve their mission: to create transformative experiences – and the Jewish future.



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Jewish Summers. Jewish Future.