

JEWISH OVERNIGHT CAMPS

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A STUDY OF THE GREATER TORONTO AREA MARKET



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PREFACE

In the fall of 2007, as part of its 2008 annual campaign, UJA Federation of Greater Toronto launched a groundbreaking initiative meant to raise awareness of the power and importance of Jewish summer camp and to begin to build capacity within the Jewish overnight camps that serve the Greater Toronto community. TopBunk (www.topbunk.ca), the Jewish camp incentive program, has already introduced hundreds of youngsters to their first Jewish camp experience, and additional capacity building strategies are being considered.

Critical to these strategies is the need to research and understand the market in order to develop concise marketing and public relations strategies that will effectively reach out to a diverse Jewish population.

This report gives us the first clear understanding of how to communicate effectively with Toronto area Jewish families about the value and benefits of attending Jewish overnight camp. This study engaged more than 1,800 parents through qualitative consumer interviews in the Toronto area, and then through an online survey. Parents described the decision-making that contributes to their choice of summer plans for their children; this information was invaluable.

We thank Professor Steven M. Cohen and Dr. Judith Veinstein for their formulation and implementation of this research, and for their interpretation of the data. We recommend this report to Jewish communal policy makers, camp directors, clergy, and educators. It is our hope that this study will help shape the way Jewish summer camps analyze consumer information, and empower them to develop appropriate strategies to more effectively reach their audience.

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Additionally, we are grateful to the Jewish summer camps serving the Greater Toronto Area — Camp Agudah, URJ Camp George, Camp Gesher, Camp Kadimah, Camp Moshava, Camp Northland-B’nai Brith, Camp Ramah in Canada, Camp Shalom, Camp Shomria, and Camp Solelim — for their collegiality and cooperation in completing this study.

INTRODUCTION

Overnight Jewish summer camps for children demonstrate lasting, long-term influences upon adult Jewish identity. In fact, mounting research testifies to the educational effectiveness of Jewish summer camps, nonprofit organizations sponsored by JCCs, federations, religious movements, Zionist movements, individual synagogues, and other Jewish agencies. (Cohen, 2000; Cohen and Kotler-Berkowitz, 2004; Keysar and Kosmin, 2001, 2005)

Among the many reasons observers believe that Jewish camps are effective instruments of Jewish education and socialization is that they engender very positive feelings about Judaism and the Jewish community. Former campers remember their experiences with great fondness, linking pleasurable childhood memories with Jewish educational growth. (Fox, 1997; Sales and Saxe, 2003)

While participation in overnight Jewish camping has grown significantly over the past half century, the current levels of camper enrollment still leave room for further growth.

One challenge to expanded enrollment is the competition between Jewish summer camps and other summer experiences, among them “non-sectarian” camps. Another is the financial expenditure, which many parents find daunting or difficult; almost all see it as a discretionary expense when considering summer plans for their children.

Action-oriented research will provide a deeper understanding of parents and campers in the target market, enabling overnight Jewish summer camps to serve greater numbers of children in the Greater Toronto Area and compete more effectively with other summertime activity options for Jewish youngsters.

This research seeks to provide such information by addressing these and other questions:

- Of those who attend summer camps, how many attend Jewish camps and how many attend non-sectarian camps? What is the current market penetration rate of Jewish summer camps among Jewish families in the Toronto area?
- Which sorts of Jewish families patronize Jewish camps, non-sectarian camps, or choose no camp at all?
- Which sorts of Jewish children patronize Jewish camps, non-sectarian camps, or choose no camp at all?
- What are the incentives and the obstacles to attendance at a Jewish camp? How important is cost as a barrier?
- To what extent do non-sectarian camps, or other activities, compete with Jewish camps?
- How can camps persuade parents who have never experienced Jewish camp to consider sending their children?
- How can camps better communicate with the parents of current and future campers to increase recruitment and retention?
- How can this research inform policy and future goals of the Greater Toronto Area Jewish camp community?

METHODS

To address these issues, we conducted a survey of Jewish parents with youngsters between the ages of 4 and 14 living in the Greater Toronto Area.

The survey questionnaire explored issues such as:

- **Recent and previous attendance at summer camp, both Jewish and non-sectarian**
- **Reasons for and against attendance at Jewish camps**
- **Summer activities aside from camping**
- **Issues of cost-sensitivity**
- **Jewish identity characteristics of parents and their camper-age children**
- **Socio-demographics of both parents and children.**

We surveyed two population segments. One segment, the “population” sample, approximates the relevant Jewish population of Greater Toronto. These respondents were supplied by EMI Surveys, a Cincinnati-based corporation that describes itself as “the preferred online sample provider since 1999. We are in the business of providing high quality samples to leading market research companies.” (www.emisurveys.com)

The other “community” sample drew upon referrals from and lists provided by a selection of Greater Toronto’s Jewish summer camps, congregations, and UJA Walk-a-Thon participants.

The greater part of the analysis draws upon the evidence collected from the population sample (N=225). Preliminary analyses demonstrated that the community/camp lists differed from the general population sample supplied by EMI. The former consisted almost entirely of camping families. Of these, almost all belonged to a congregation, few were intermarried, and they tended to score in the higher ranges of Jewish engagement. The EMI sample allowed comparison of camp and non-camp families. It encompassed both those who have sent their children (i.e., “camp families”) as well as those who have not (i.e., “non-camp families”).

Given our interest in understanding both camp and non-camp families in an unbiased fashion, we focused the statistical analysis exclusively on the EMI general population sample. However, we used the community sample (N=1569) to draw profiles of those who attended each of the ten Jewish camps serving the Greater Toronto Area, allowing us to develop an understanding of how the camp populations vary.

Prior to constructing the surveys, we conducted qualitative interviews by telephone with 18 Jewish parents as well as focus groups with Jews of Israeli and Russian origin. These interviews shaped the construction and wording of the questionnaire; text excerpts of their analysis are *italicized*.

For the sake of clarity and consistency, the following terms are used throughout this study:

“Jewish camp” refers to a nonprofit overnight summer camp with Jewish programming and a Jewish mission.

“Non-sectarian camp” refers to a privately owned overnight summer camp with mostly Jewish clientele (in Toronto, these are commonly referred to as the “W/T” camps).

“Toronto” refers to the Greater Toronto Area (or GTA).

“UJA Federation” refers to UJA Federation of Greater Toronto.

FINDINGS

Jewish and Non-sectarian Camps: A Competitive Situation

In the Greater Toronto Area, our survey found that almost one-in-four, or 24%, of Jewish children ages 4–14 attended Jewish overnight camp this past summer (2008, see Table 1). Moreover, 39% of families with children in this age group reported that at least one child had attended a Jewish summer camp at some point in the recent past.

These rates are almost identical to those of families with 4–14 year-olds who attended non-sectarian camps (22% of children in 2008, and 39% of families ever). In other words, the results indicate equal numbers of Jewish children in the Greater Toronto Area attending overnight summer camps with a Jewish educational mission as those attending private, non-sectarian camps.

Evidence testifies to a significant overlap between users of explicitly Jewish camps and users of non-sectarian camps with large Jewish-camper populations. In fact, almost 25% of those who attended Jewish camp in summer 2008 also attended a non-sectarian camp. Most dual-attendance campers attended specialty camps focusing on sports or drama, for example.

In like fashion, among all families who have ever sent their children to Jewish camp, most (about three-in-five) also enrolled their children in a non-Jewish camp at some point. Of all families who have ever sent any of their children to any kind of overnight summer camp, over 40% sent children to both kinds of camps—a higher percentage than those who sent their children to just one or the other type of camp. Clearly, non-sectarian camps enjoy a high profile among Jewish camping families: It is likely that these families have chosen non-sectarian camps for their own children or probably know people who have.

TABLE 1: ATTENDANCE AT JEWISH CAMP AND OTHER SUMMER CAMPS

	ATTENDED ONLY JEWISH OVERNIGHT CAMP	ATTENDED BOTH JEWISH AND NON-JEWISH OVERNIGHT CAMP	ATTENDED ONLY NON-JEWISH OVERNIGHT CAMP	NEVER ATTENDED OVERNIGHT CAMP	TOTAL ATTENDED JEWISH OVERNIGHT CAMP	TOTAL ATTENDED NON-JEWISH OVERNIGHT CAMP
ATTENDED IN 2008	18%	6%	16%	59%	24%	22%
ATTENDED EVER	16	23	16	45	39	39

“While competition with non-sectarian camps for campers remains significant, Jewish summer camps serving the GTA are able to capture a significant percentage of the market.”

FINDINGS

While competition with non-sectarian camps for campers remains significant, Jewish summer camps serving the GTA are able to capture a significant percentage of the market. Of families with camper children in 2008, 60% sent their children to a Jewish overnight camp in the summer of 2007. In fact, 70% of families who ever sent a child to summer camp sent one to a Jewish camp at some point (i.e., “ever”; see Table 1).

The distribution of campers in 2008 and at all times in the past suggests three related findings:

- **A large minority of Jewish families in Greater Toronto send their children to Jewish summer camp. Probably almost half of Jewish children attend such a camp by the time they reach adolescence.**
- **Jewish camps compete with non-Jewish camps, with each attracting about half the camping market at any point in time.**
- **Specialty camps, all of which are non-sectarian in sponsorship, seem to hold a special appeal to a significant segment of the Jewish camper market.**

Who Attends Summer Camps?

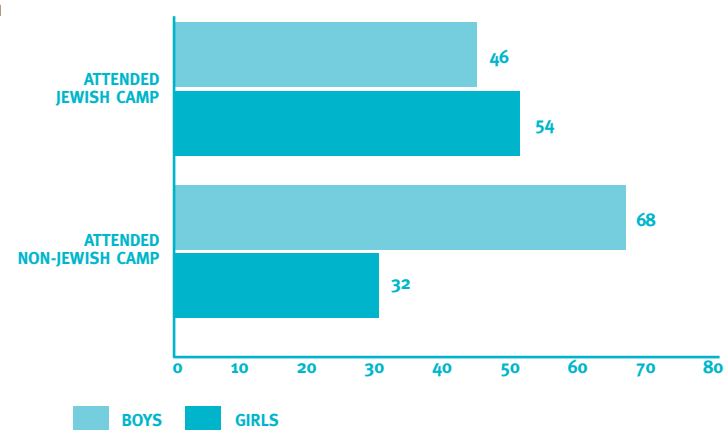
Before understanding why some families participate in Jewish overnight camping and others do not, we explored the demographics of Jewish summer campers, and asked: Who attends Jewish summer camps?

Jewish Camps: Where the Girls Are

More girls than boys attended Jewish camp in the summer of 2008, with the number of girls exceeding the number of boys by a 54–46% margin (see Figure 1). UJA Federation’s gender analysis of Jewish overnight campers in 2008 reflects this finding. This finding corresponds to the gender gap prevalent in Jewish life (and is mirrored in all other religious groups around the world). By adolescence, girls lead boys in most areas of Jewish engagement. Thus, the preponderance of girls and women in Judaism matches the preponderance of girls in Jewish summer camps that serve the Toronto area.

While the Jewish summer camp population tilts in the direction of girls, the non-sectarian camp population exhibits a lopsided boy-girl ratio of two-to-one in 2008. These results point to the opportunity to make Jewish camps more boy-friendly. The Jewish educational message seems to attract girls; but a different mix of facilities and recreational activities may attract some of the many boys who now attend non-sectarian summer camps.

FIGURE 1: GENDER AND SUMMER CAMP ATTENDANCE



FINDINGS

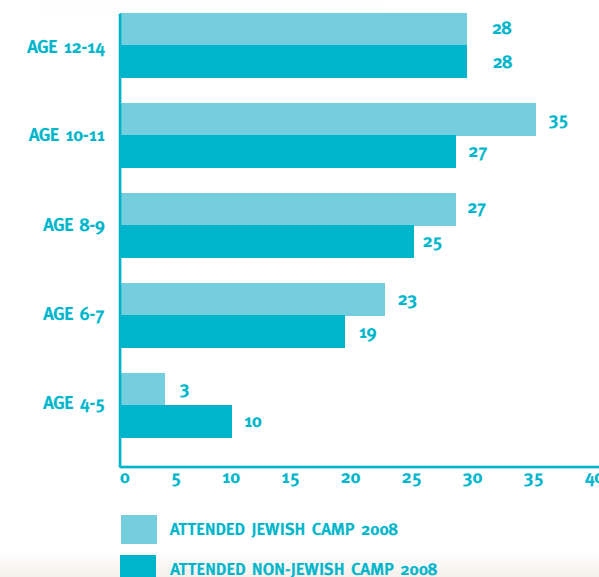
The Age Contours: An Older Start at the Jewish Camps

While hardly any children under age 6 attended Jewish summer camps in 2008, parents enrolled their 4–5 year olds in non-Jewish summer camps in small percentages (see Figure 2). These results suggest Jewish camps could gain campers through highly targeted efforts to recruit and enroll very young campers, age 5 or so. As learned in our qualitative research,

Parents usually do not want to switch camps once their child has begun and has had an enjoyable experience. Furthermore: At least one parent said that there wasn’t enough information and publicity about Jewish overnight camps, suggesting that marketing needs to start early (first grade or kindergarten) through many sources such as the Canadian Jewish News, the Internet, opportunities to participate in a brief “taste of” camp, camp videos, and presentations at temples.

Study results show that participation in Jewish camping peaks at ages 10–11 and then begins to decline at ages 12–14. Jewish adolescents past the age of 13 increasingly disengage from Jewish life (a pattern mirrored in other religious groups).

FIGURE 2: AGE AND SUMMER CAMP ATTENDANCE



As can be seen in Figure 2, the percentage of campers at non-sectarian camps continues to rise (albeit slightly) with each age group. This suggests that older children are still interested in camping, but that the Jewish camps must devise more effective camper retention strategies.

Non-sectarian Camps Attract Campers from More Affluent Families

Examination of various gross family income thresholds reveals that annual income levels of \$150,000 and above differentiate summer camp participation within various sub-groups.

In general, camping enrollment is substantially higher among the more affluent (\$150,000 or more) than the less affluent (below \$150,000). As shown in Table 2, any sort of camp participation jumps from 33% among the less affluent to as much as 53% among the more affluent.

The number of families sending children to Jewish camp grows slightly from 25% for families with income below \$150,000 to 27% for those with income above \$150,000 (some of those going to Jewish camp also attend non-sectarian camp). In contrast, attendance at non-sectarian camp nearly doubles as income rises, moving from 19% to 34% (see Figure 3).

These patterns suggest that need-based financial aid may well be important for the less affluent, and could provide an especially effective entrée to Jewish camping for the large majority of less affluent families whose youngsters who attend no camp of any sort. In fact, for them the more affluent population at the non-sectarian camps may prove to serve as a disincentive even if they felt that they could afford such camps. Conversely, despite the fact that affluence is generally associated with higher rates of Jewish communal participation, anecdotal evidence from around North America suggests that most highly affluent families choose not to attend Jewish camps.

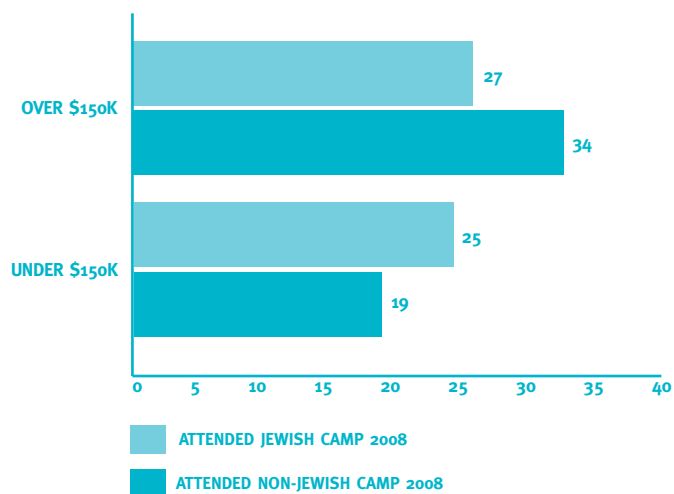
FINDINGS

However, subsidies may be less effective for the more affluent, who strongly prefer non-sectarian camps when planning summertime activities. Changing the mix of Jewish camp facilities and activities, especially by offering specialty activities, may provide a more effective strategy in reaching these families.

TABLE 2: HOUSEHOLD INCOME AND CAMP ATTENDANCE

	ATTENDED JEWISH OVERNIGHT CAMP	ATTENDED JEWISH AND NON-JEWISH OVERNIGHT CAMP	ATTENDED NON-JEWISH OVERNIGHT CAMP	ATTENDED ANY TYPE OF OVERNIGHT CAMP	NOT AN OVERNIGHT CAMPER
UNDER \$150K	15%	10%	9%	33%	67%
OVER \$150K	20	7	27	53	47

FIGURE 3: AFFLUENCE AND CAMP ATTENDANCE



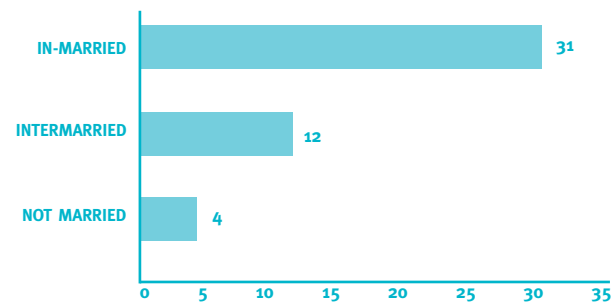
The Jewishly Engaged Attend Jewish Camps More Often

Youngsters from homes that are more engaged in Jewish life are far more likely to attend Jewish summer camps than are those with weaker Jewish connections. This correlation can be observed on several levels, in ways that apply to parents and to the youngsters themselves.

The In-married More than the Intermarried

Children of in-married Jews are more likely to attend Jewish camps than children of intermarried couples (see Figure 4). Of those who are in-married, just about a third (31%) sent their children to Jewish overnight camp in 2008. Less than half of that amount (12%) of intermarried couples sent their children to Jewish overnight camp in 2008.

FIGURE 4: IN-MARRIED VS. INTERMARRIED FAMILIES AND JEWISH CAMP ATTENDANCE 2008



FINDINGS

By way of explanation, intermarriage is associated with lower levels of involvement in Jewish life; moreover, most intermarried couples raise their children as non-Jews (see for example, Beck (2005), Chertok, et al. (2008), Cohen (2006), Fishman (2004), Kosmin, et al. (1991), Medding, et al. (1992), Phillips and Fishman (2006), Phillips (2005a and 2005b)). These and other considerations help explain the significantly lower levels of participation in Jewish summer camp by the children of intermarried families (see Table 3).

TABLE 3: IN-MARRIED VS. INTERMARRIED FAMILIES AND JEWISH CAMP ATTENDANCE 2008

	IN-MARRIED	INTERMARRIED	NOT MARRIED
EVER ATTENDED ONLY JEWISH OVERNIGHT CAMP	19%	8%	4%
EVER ATTENDED JEWISH AND NON-JEWISH OVERNIGHT CAMP	25	8	25
EVER ATTENDED ONLY NON-JEWISH OVERNIGHT CAMP	16	12	21
NEVER ATTENDED OVERNIGHT CAMP	39	72	50
TOTAL	100%	100%	100%

Examining the correlation of in-marriage and intermarriage to their children's attendance at a Jewish overnight camp supports the notion that the more Jewishly engaged also attend Jewish camps in higher numbers. As shown in Table 3, 44% of in-married families have sent their children to a Jewish overnight camp, compared to 16% of the intermarried.

Synagogue Affiliated: A Small Lead Over Non-Members in Attending Jewish Camps

Consistent with the apparent link between Jewish engagement and Jewish summer camp enrollment, synagogue members send their children to Jewish camps more frequently than non-members (45% vs. 30% have ever done so, see Figure 5). In 2008, 30% of synagogue members' children attended a Jewish camp, compared to 21% of non-members.

In this study, synagogue members scored higher on all indices of Jewish engagement, as well as the index of aspirations for the Jewish identity of their children. Moreover, by virtue of their membership, they are also exposed to Jewishly engaged social networks and other families who patronize Jewish summer camps. Synagogue members also tend to be more affluent than non-members.

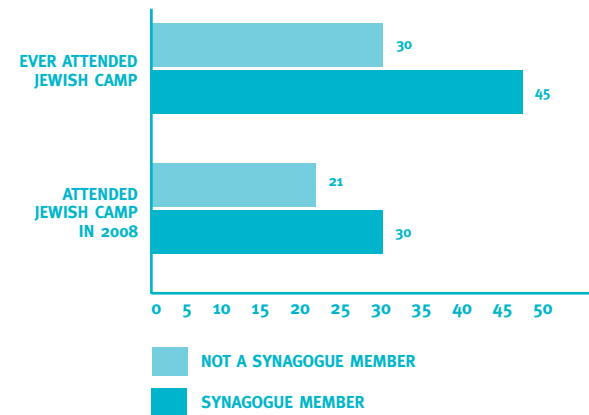
Still, what is notable is not the expected lead among the congregationally affiliated but the extent to which non-member families in fact do enroll their children in Jewish camps. Such results show that families outside the synagogues have significant levels of Jewish interest, apparently significant enough to produce noteworthy rates of utilization of Jewish summer camps. This pattern is consistent with the observation that Canada has been able to sustain Jewish commitment among Jews outside the synagogue more than the United States; moreover, the relatively large Jewish immigrant populations in the Greater Toronto Area further augment the phenomenon of committed Jews outside the synagogue.

FINDINGS

TABLE 4: SYNAGOGUE MEMBERSHIP AND CAMP ATTENDANCE 2008

	SYNAGOGUE MEMBERS	NOT SYNAGOGUE MEMBERS
ATTENDED ONLY JEWISH OVERNIGHT CAMP 2008	23%	14%
ATTENDED JEWISH AND NON-JEWISH OVERNIGHT CAMP 2008	7	7
ATTENDED ONLY NON-JEWISH OVERNIGHT CAMP 2008	22	8
DID NOT ATTEND OVERNIGHT CAMP IN 2008	49	72
TOTAL	100%	100%

FIGURE 5: SYNAGOGUE MEMBERSHIP AND JEWISH CAMP ATTENDANCE



“Still, what is notable is not the expected lead among the congregationally affiliated but the extent to which non-member families in fact do enroll their children in Jewish camps.”

FINDINGS

Parity Among the Denominations in Rates of Jewish Camping

In looking at major streams of Judaism, we find rough parity among Orthodox, Conservative, and Reform families (see Figure 6). Of note is the significant number of Orthodox families who send their children to non-sectarian camps, perhaps reflecting the parents’ sense that they are providing adequate Jewish education and socialization by way of their families, communities, and day schools.

Of equal note are the patterns among Reform respondents. They report both the highest levels of Jewish camp use of all three major denominations, and, possibly reflecting greater affluence, the highest level of camp use (Jewish or non-sectarian) overall. As shown in Table 5, fully 83% of Reform Jewish families have sent their children to some sort of overnight summer camp as compared with 61% of the Orthodox and 68% of Conservative families. In effect, Reform families are already firmly convinced of the virtues of camping. For Jewish camps, the challenge is to move these families from non-sectarian to Jewish camps.

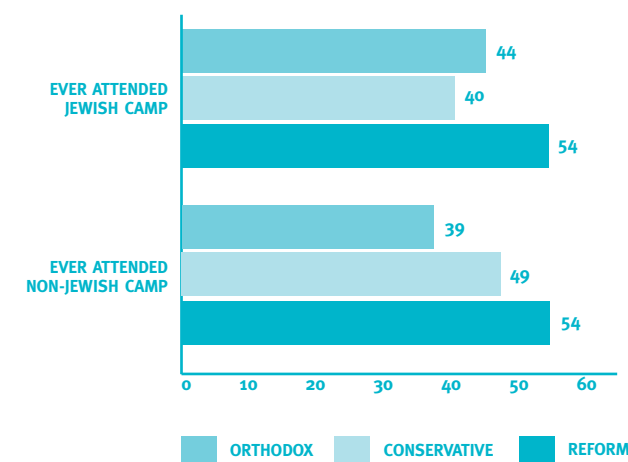
TABLE 5: DENOMINATION AND CAMP ATTENDANCE

	ORTHODOX	CONSERVATIVE	REFORM
EVER ATTENDED ONLY JEWISH OVERNIGHT CAMP	22%	19%	29%
EVER ATTENDED JEWISH AND NON-JEWISH OVERNIGHT CAMP	22	21	25
EVER ATTENDED ANY JEWISH OVERNIGHT CAMP	44	40	54
EVER ATTENDED ONLY NON-JEWISH OVERNIGHT CAMP	17	28	29
EVER ATTENDED ANY SORT OF OVERNIGHT CAMP	61	68	83
NEVER ATTENDED OVERNIGHT CAMP	39	32	17

Peak Participation Segment: Youngsters in 2+ Days-a-week Religious Schools

Youngsters who attend supplementary school two or more times per week are the most frequent users of Jewish summer camps (see Table 6). These children outscore all other youngsters in attending Jewish camps, even those who attend day schools. In 2008, 50% of such youngsters attended Jewish summer camps, roughly double the rates at which day school youngsters and those in one-day-a-week programs attended.

FIGURE 6: DENOMINATIONAL AFFILIATION AND CAMP ATTENDANCE



FINDINGS

The same families were also heavy users of non-sectarian camps (see Table 6). As might be expected, enrollment and usage shifts in the direction of Jewish camps with increasing depth of Jewish education. In other words, while day school families utilize Jewish camps less than others, when they do turn to a camp, they turn to a Jewish camp more often than others do.

A combination of factors contributes to high levels of Jewish camp utilization by families whose youngsters attend more intensive religious schools. In general, families with children in 2+ days-a-week Jewish schools exhibit higher levels of Jewish commitment than those attending Jewish schools one day a week or not at all. At the same time, Jewish day school families may feel “tapped out” in considering the additional educational/recreational expense of Jewish camping. Parents of supplementary school youngsters (who often may have no tuition costs other than synagogue membership dues) may very well feel they have more disposable income to finance their children’s Jewish education than day school parents who already pay substantial tuition.

TABLE 6: JEWISH SCHOOLING AND CAMP ATTENDANCE

	ATTENDED JEWISH OVERNIGHT CAMP 2008	SOMEONE IN FAMILY ATTENDED JEWISH OVERNIGHT CAMP EVER	ATTENDED NON-JEWISH OVERNIGHT CAMP 2008	SOMEONE IN FAMILY ATTENDED NON-JEWISH OVERNIGHT CAMP EVER
ORTHODOX DAY SCHOOL	21%	43%	14%	14%
NON-ORTHODOX DAY SCHOOL	28	43	25	46
2+ DAYS A WEEK	50	60	40	60
1 DAY A WEEK	23	39	27	44
NONE	13	19	11	19

FINDINGS

Jewish Commitment and Jewish Camping: A Complex Relationship

Studies of Jewish camp utilization in the United States demonstrate that parents who are committed to raising Jewishly engaged youngsters are also more likely to send their children to Jewish camps. However, as we have seen in Toronto, Jewish camp utilization fares worse among day school households and even worse among Orthodox day school families. A curious pattern emerges: There is no statistical relationship between highly engaged Jewish families and Jewish camp utilization. As we learn, as Jewish commitment increases, the use of day schools increases as well; and day schools, in turn, compete with Jewish summer camps for limited parental resources and as providers of Jewish educational experiences for the youngsters.

To probe this issue deeper, we examined the extent to which parents who expressed a commitment to raising Jewishly engaged children enrolled their children in Jewish summer camp.

We measured commitment to raising Jewishly engaged children by posing several illustrative questions: With respect to your child(ren), how important is it to you that:

- They receive an intensive Jewish education?
- When they are old enough, they date only Jews?
- They marry someone Jewish?
- They celebrate Shabbat as an adult?
- They celebrate Jewish holidays as an adult?

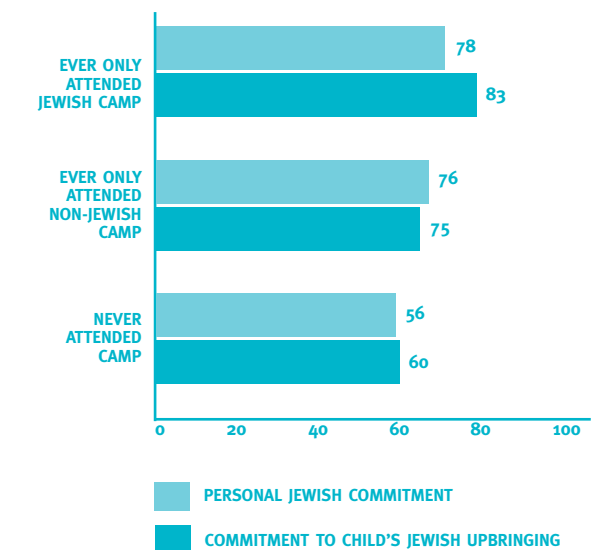
We measured personal Jewish commitment by drawing upon these illustrative questions:

- How important is being Jewish in your life?
- Does your family belong to a synagogue?
- Frequency of attending synagogue services
- How many of your closest friends are Jewish?

Scores on these two scales are hardly different and the differences are indeed in the expected direction (see Figure 7). However, they are so small as to demonstrate that in Toronto, there is no simple translation from Jewish commitment to Jewish camp use, at least when day school enrollment is part of the mix.

In fact, the expected relationships do emerge, but only when analysis is limited to non-day school families. That is, for the non-day school population, camp use increases with each rise in the intensive level of Jewish educational commitment. Day schools, then, for some parents, appear to serve as an alternative to Jewish camps. Moreover, just as some day school parents decline to enroll their children in Jewish camps, some supplementary school parents may decide to enroll their children in Jewish camp to counterbalance not sending their children to Jewish day schools.

FIGURE 7: JEWISH COMMITMENT AND CAMP ATTENDANCE



FINDINGS

The Power of Camp-related Motivations: Jewish Education, Jewish Association, and Israel

The findings indicate that a parent's Jewish commitment and aspiration for their child's Jewish engagement is statistically unrelated to their decision to send their children to Jewish camps. However, other motivations have a powerful effect upon this decision. A number of points of evidence indicate that parents who seek to make summer camp a Jewish educational experience were far more likely to turn to Jewish camps for their children. These parents seek Jewish education, Jewish campers and staff (Jewish association), or Israeli connections (staff or programming).

This points to a specific and important distinction between two seemingly related sentiments: commitment to raising Jewishly committed youngsters, and valuing Jewish camps as a way of Jewishly educating one's children. The former is far less critical in statistically predicting Jewish camp utilization than the latter. To say it plainly, the issue is not (as it may be in the United States) to convince parents that they should want to raise their youngsters as committed Jews; rather, the key issue is to convince parents that camps are an excellent vehicle for doing so.

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FINDINGS

Qualitative interviews yielded similar insights: Parents who value Jewish learning and Jewish values choose Jewish overnight camp for their children. They want their children to internalize Jewish values, make Jewish friends, date Jews (when they are old enough), and be exposed to Israelis and Hebrew. The interviewees reported that they want their children to connect Judaism and Jewish learning with friendship and fun, explore their roots, and discover their “cultural and religious uniqueness.”

To address these issues in our survey analysis, we measured the motivation for camps as instruments of Jewish education with the following items:

- Exposure to Jewish role models
- It teaches something about being Jewish
- It celebrates Shabbat in some way
- The food is kosher.

We measured the motivation for camps as venues for Jewish association against the following:

- All or almost all of the campers are Jewish
- All of the bunk counselors are Jewish.

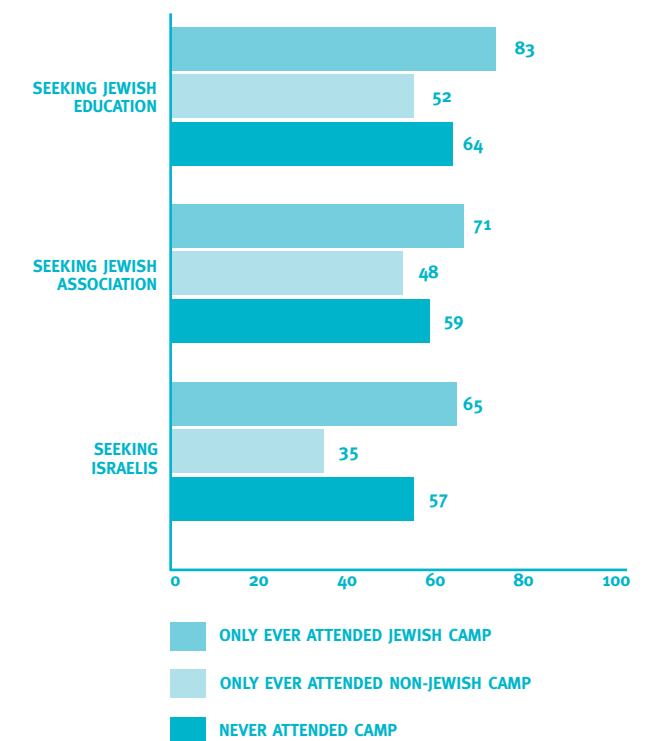
We measured the motivation for camps as places to connect with Israel against the following:

- The presence of Israeli counselors on staff
- Some exposure to Hebrew language.

These three motivations emerge as powerful differentiators among those who enroll their children in Jewish camps, those who sign up for non-sectarian camping, and those who have never selected camping for their children (see Figure 8).

It is noteworthy that among those families who have had no connection with any sort of camp, motivation levels for a Jewish educational camping experience lie between the levels of families who have patronized exclusively Jewish and exclusively non-sectarian camps. This finding suggests that these parents resist enrolling their children in Jewish camps for other reasons than these designated motivators. As we have seen, some evidence points to cost as a significant barrier for families who have never sent their children to Jewish camp.

FIGURE 8: SEEKING JEWISH EDUCATION, ASSOCIATION, AND ISRAELIS (SCALES) AND CAMP ATTENDANCE



FINDINGS

Families whose children attend non-sectarian camp seem to have lower expectations of—or motivations for—camp providing their children with Jewish educational enrichment. Moreover, those who have provided their children with both Jewish and non-sectarian camping score higher on a fourth measure of motivation, labeled “Seeking high quality.”

This measure draws upon the following items:

- **The very best in sports and recreational facilities**
- **Special activities such as sports, arts, or computers**
- **Top-flight living quarters.**

Evidence, then, points in the direction of facilities and activities (and not cost or Jewish education) as appealing motivators for families with youngsters attending non-sectarian camps. This group can be further engaged through subsidies as well as more persuasive marketing that demonstrates why and how Jewish camps provide Jewish educational experiences. However, non-sectarian camp clientele is seeking quality recreation for their children and, apparently, believe it can be found more readily in non-sectarian versus Jewish camp offerings that serve the Toronto area.

Other Summer Activities: The “Competition”

Involvement in other summertime activities does not seem to constitute an impediment to participating in Jewish camps or, for that matter, camps in general. No clear conclusions can be drawn from patterns of participation in a variety of non-camp activities for those who went to Jewish camps, non-sectarian camps, both, or neither (see Table 7).

One noteworthy distinction is associated with those attending both Jewish and non-sectarian camps. These youngsters seem relatively more active as compared with those in other situations. Their families travel more and involve them in more activities. More active and affluent families may constitute a high-end niche market that could be provided with innovative Jewish camping offerings.

TABLE 7: SUMMER ACTIVITIES AND CAMP ATTENDANCE 2008

	ATTENDED JEWISH CAMP 2008	ATTENDED JEWISH AND NON-JEWISH CAMP 2008	ATTENDED NON-JEWISH CAMP IN 2008	NOT AN OVERNIGHT CAMPER 2008
SWIM CLUB OR BEACH SUMMER	22%	40%	35%	39%
COTTAGE OR VACATION HOME	39	53	30	36
FAMILY VACATION	51	47	54	47
TRAVEL IN CANADA	37	60	38	31
TRAVEL OUTSIDE CANADA	44	47	35	29
JEWISH-SPONSORED DAY CAMP	20	67	16	21
NON-SECTARIAN DAY CAMP	20	60	16	36
SUMMER SCHOOL	10	60	14	4
SPORTS TEAMS	29	73	38	26

FINDINGS

Goodwill Toward Jewish Camps, But Even More for Non-sectarian Camps

The extent to which parents themselves have good (or bad) impressions of Jewish camp experiences in their own lives is, in and of itself, important for understanding the context in which Jewish camping is advocated and communicated. In general, parents who went to Jewish camps in their youth have fond recollections, but their memories of non-sectarian camps they attended with many other Jewish campers are even fonder.

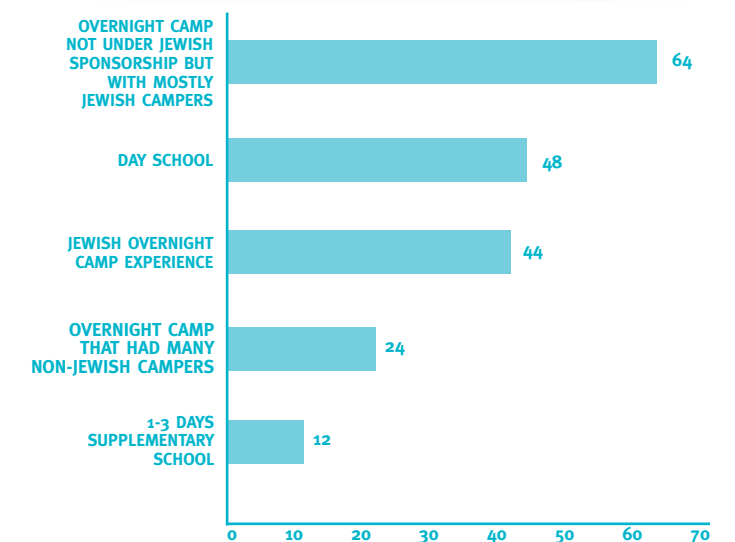
Evidence of positive feelings toward Jewish camping comes in the parents’ memories of their Jewish educational experiences, including camping, when they were children some 20, 30, or 40 years ago. Their memories of Jewish camp compare quite favorably with their memories of other forms of Jewish education in their childhood. However, as positive as are their memories of Jewish camping, their memories of other camps (those with many Jewish campers and no explicit Jewish educational mission) are even more positive.

We asked respondents to assess their Jewish educational experience on a five-point scale, ranging from highly negative to highly positive. Of those who went to Jewish day schools as youngsters, 48% assigned the highest possible “very positive” score to their experience. In contrast, just 12% were as positive about their attendance at supplementary schools that met one to three days a week (see Figure 9).

For their part, Jewish summer camps scored high as well, with 44% garnering the maximum score. At the same time, far more (64% in all) reported positive recollections of the time they spent at private camps that attracted a large number of Jewish children.

The positive feelings about Jewish camp should provide a resource to facilitate recruitment. That said, the even more widespread positive feelings about the non-sectarian camp experience should remind leaders of Jewish camps that they reside in a highly competitive environment.

FIGURE 9: PERCENT POSSESSING “VERY POSITIVE” MEMORY OF CAMP AND JEWISH SCHOOLING



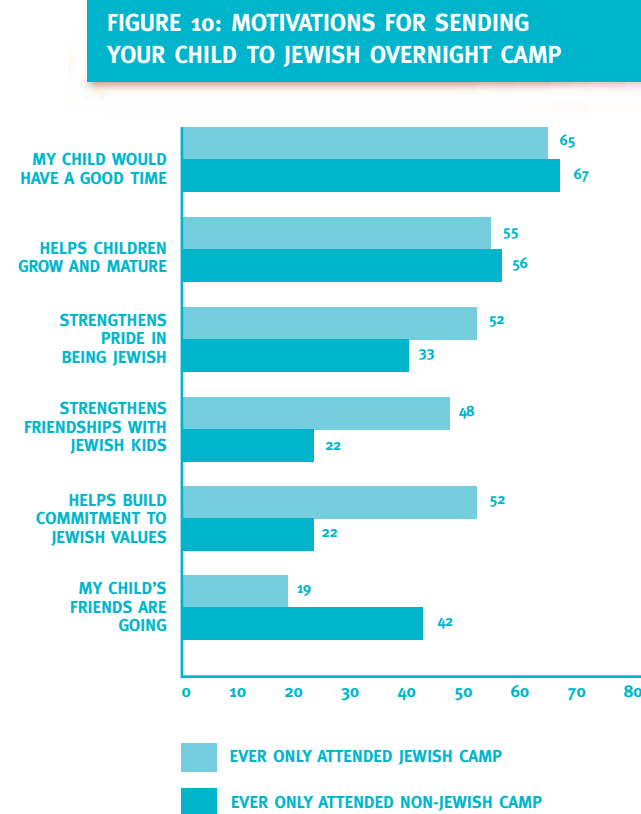
FINDINGS

Motivations: To Have Fun and to Grow as a Person

We presented parents with several reasons for enrolling children in Jewish overnight camps, asking them to evaluate the persuasiveness of each argument. For those who have never enrolled their children in Jewish camp, two reasons emerged as the most persuasive:

- “He/she would have a good time”
- “Being away with others the same age would help your children grow and mature.”

As shown in Figure 10, parents whose children had been to Jewish camps or who chose non-Jewish camps also found these arguments the most persuasive. They were also the most consistent reasons for both groups.



FINDINGS

Families enrolling their children at Jewish camps last summer differed markedly from those who never experienced Jewish camping. These parents were consistent with both with the Jewish educational motivators as well as with what may be called the more “general” motivations to consider Jewish camping. For example, the claim that a Jewish camp experience “strengthens friendships with other Jewish kids” was considered very persuasive by 34% of the non-camping parents, compared to 48% of those whose children attended Jewish camps exclusively (see Table 8).

Other motivations to which Jewish camper parents responded far more favorably than parents of children in non-sectarian camps consisted of the following:

- Strengthen pride in being Jewish
- Build commitment to Jewish values
- Provide with an all-Jewish environment
- View counselors as Jewish role models
- Learn about being Jewish
- Fortify identity with Israel and Israelis.

“For you personally, how persuasive do you find each of the following reasons for sending your child to a Jewish overnight camp?”

TABLE 8: REASONS FOR SENDING YOUR CHILD TO JEWISH OVERNIGHT CAMP

	EVER ATTENDED ONLY JEWISH CAMP	EVER ATTENDED JEWISH AND NON-JEWISH CAMP	EVER ATTENDED ONLY NON-JEWISH CAMP	NEVER BEEN AN OVERNIGHT CAMPER	TOTAL
MY CHILD WOULD HAVE A GOOD TIME	65%	58%	67%	59%	61%
HELPS CHILDREN GROW AND MATURE	55	42	56	41	46
STRENGTHENS PRIDE IN BEING JEWISH	52	26	33	33	34
STRENGTHENS FRIENDSHIPS WITH JEWISH KIDS	48	21	22	34	31
HELPS BUILD COMMITMENT TO JEWISH VALUES	52	21	22	30	30
MY CHILD'S FRIENDS ARE GOING	19	35	42	18	26
PUTS CHILDREN IN AN ALL-JEWISH ENVIRONMENT	39	21	19	22	24
THE COUNSELORS WILL BE JEWISH ROLE MODELS	29	23	17	22	23
WOULD LEARN A LOT ABOUT BEING JEWISH	37	21	6	24	22
STRENGTHENS IDENTITY WITH ISRAEL AND ISRAELIS	39	21	14	20	22

FINDINGS

Clearly, current clientele appreciates the Jewish educational impact of Jewish camping, while other parents are less motivated by such benefits. A large number of those enrolling their children in non-sectarian camping indicated that the most persuasive reasons to provide Jewish overnight camping to their children would be: to create a good time; to help them grow and mature; and to share the experience with the children's friends who were also attending. The implication is that Jewish camps need to communicate other types of advantages of Jewish camping to prospective parents, and to substantiate those claims with the appropriate programs, staff, and facilities.

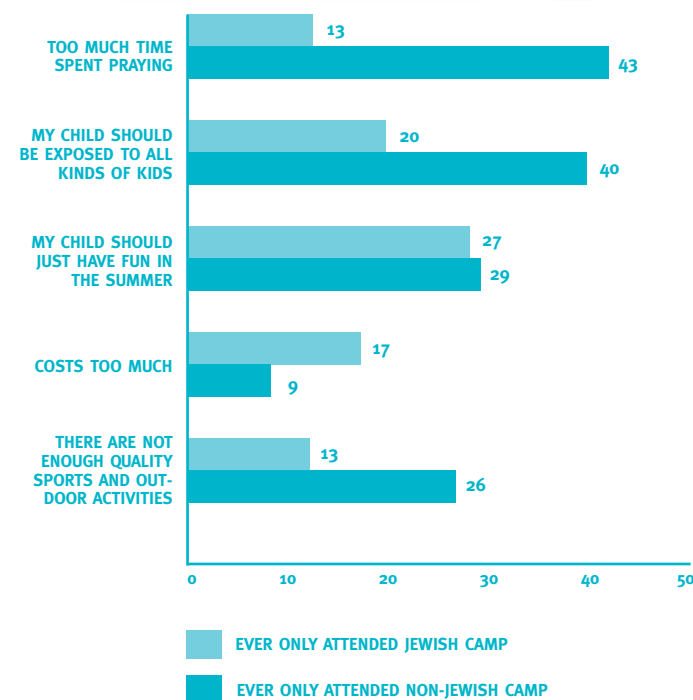
Obstacles: Fear of Ghettoization, Cost, Excessive Prayer, and No Fun

For the most part, Jewish parents in the Greater Toronto area are favorably disposed toward their identity as Jews and seek to raise their children as engaged Jews. Yet, about half of these families do not provide any of their children with a Jewish overnight summer camping experience. This begs the question: Why? What do they find unappealing about Jewish camping?

Parents assessed the persuasiveness of several arguments against sending children to Jewish overnight camps. Five stood out as especially important objections (see Figure 11). They were:

- Too much time is spent praying
- My child should be exposed to all kinds of kids, not just Jews
- My child should just have fun over the summer
- It costs too much
- There are not enough quality sports and outdoor activities.

FIGURE 11: OBSTACLES TO SENDING CHILDREN TO JEWISH OVERNIGHT CAMP



FINDINGS

Parents were more sensitive to these objections than any other objections. Parents who had previously only enrolled their children in non-Jewish camping were more “put off” by the notions of too much prayer and the lack of a diverse, non-sectarian summer camping community. Qualitative interviews confirmed:

The parents who chose not to send their children to Jewish overnight camps weren't sure “which Jewish practices” were taught at camp. Some were concerned about the dietary restrictions. Some mentioned that they didn't want their children coming home from camp and becoming religious. (This last point was definitely the feeling of many of the Israeli interviewees.)

In other ways, survey findings reflected pre-survey qualitative interviews that led to the following conclusions:

Parents listed many reasons not to send their children to Jewish overnight camps: too much time is spent “sitting and praying” (i.e., “the kids pray in the morning, in the evening, and before all their meals”), there aren't enough quality sports and outdoor activities (e.g., waterskiing every day). (One parent questioned if the Jewish camps offer sports at all.) In general and comparatively speaking, there is a perception that the facilities at the Jewish overnight camps pale in comparison to private camp facilities.

Of interest is that parents who do not send their children exclusively to Jewish camps gave different reasons for their decision. For parents with no camping experience whatsoever (neither Jewish nor non-sectarian), cost is the lead barrier (see Table 9). For those whose children attend exclusively non-sectarian camps, cost is hardly a factor; rather, they are most concerned by the seemingly excessive prayer at Jewish camps, the lack of integration and socialization with non-Jewish

populations (ghettoization), and that their children might not have fun. For parents whose children have attended both Jewish and non-sectarian camps, the prime issue is the quality of program and facilities.

TABLE 9: OBSTACLES TO SENDING CHILDREN TO JEWISH OVERNIGHT CAMP

	EVER ATTENDED ONLY JEWISH CAMP	EVER ATTENDED JEWISH AND NON-JEWISH CAMP	EVER ATTENDED ONLY NON-JEWISH CAMP	NEVER BEEN AN OVERNIGHT CAMPER	TOTAL
TOO MUCH TIME SPENT PRAYING	13%	27%	43%	22%	26%
CHILD SHOULD BE EXPOSED TO ALL KINDS OF KIDS	20	17	40	19	22
MY CHILD SHOULD JUST HAVE FUN IN THE SUMMER	27	25	29	18	23
COSTS TOO MUCH	17	25	9	26	21
THERE ARE NOT ENOUGH QUALITY SPORTS AND OUTDOOR ACTIVITIES	13	31	26	15	20
WOULD NOT WANT MY CHILD TO COME BACK RELIGIOUS	17	17	9	10	12
NONE OF MY CHILD'S FRIENDS GO TO JEWISH OVERNIGHT CAMP	10	19	11	9	12
CHILD GETS ENOUGH JEWISH SCHOOL DURING THE YEAR	0	28	14	4	11
CONCERNED ABOUT DIETARY RESTRICTIONS	17	23	9	3	11
JEWISH OVERNIGHT CAMPS DO NOT OFFER 2-WEEK SESSIONS	13	19	3	5	9
I DID NOT FIND OUT ABOUT IT UNTIL MY CHILD WAS ENROLLED ELSEWHERE	7	17	6	5	8
JEWISH CAMP IS NOT COOL	7	15	0	2	5
JEWISH CAMPS ARE NOT VERY GOOD	7	10	6	1	5

FINDINGS

Sources of Information About Camp: Friends and Family

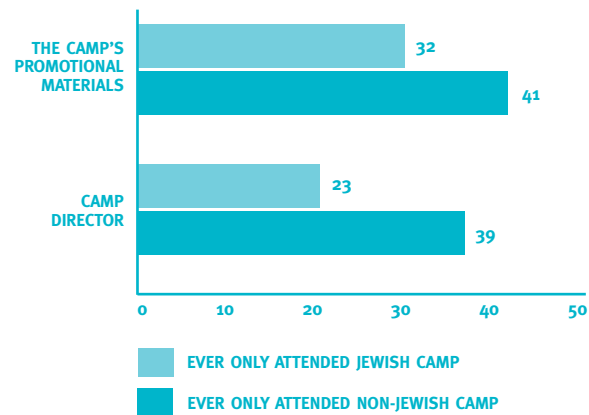
Most parents rely on word-of-mouth recommendations to learn about overnight camps (see Table 10). They talk to their friends and their child's friends' parents, as well as family and siblings about overnight camps. This finding corresponds with what was gleaned from the qualitative interviews:

The camp [that] a child's friends were attending was seen as a desirable choice for parents. Word-of-mouth recommendations are powerful!

TABLE 10: SOURCES OF INFORMATION ABOUT CAMP

	EVER ATTENDED ONLY JEWISH CAMP	EVER ATTENDED JEWISH AND NON-JEWISH CAMP	EVER ATTENDED ONLY NON-JEWISH CAMP	NEVER BEEN AN OVERNIGHT CAMPER	TOTAL
YOUR FRIENDS	64%	49%	75%	58%	60%
YOUR CHILD'S FRIENDS' PARENTS	65	46	60	53	54
FAMILY OR SIBLINGS	58	46	50	38	45
INTERNET	24	27	29	30	28
THE CAMP'S PROMOTIONAL MATERIALS	32	24	41	19	26
CAMP DIRECTOR	23	25	39	16	23
CANADIAN JEWISH NEWS	32	27	8	8	16
YOUR JCC	27	22	11	9	15
UJA FEDERATION OF GREATER TORONTO	31	20	12	6	14
ONTARIO CAMPING ASSOCIATION	12	21	17	10	14
YOUR SYNAGOGUE OR RABBI	21	16	6	9	12

FIGURE 12: SOURCES OF INFORMATION AND CAMP ATTENDANCE



Following one's personal social network, the Internet emerges as the second most frequently used source of information. This quantitative finding underscores the importance of findings drawn from qualitative research that call for more attention to the camps' web sites:

Parents are using the Internet and web sites to research camps. Web sites that are not impressive tend to give parents the impression that the camps are not impressive, either. The web sites have to list the activities that the kids want. For example, being "warm and fuzzy" isn't enough — kids want to know whether hiking and canoeing will be offered.

Also noteworthy is the way prospective camper families receive information. The "non-sectarian-only" camper families report receiving more information about their camps (i) from camp promotional materials, and (ii) from their camp directors (see Figure 12).

FINDINGS

It is possible that non-sectarian camp directors are doing a better job of informing and maintaining parent-customer relationships than their counterparts at Jewish camps. Jewish camp directors appear to rely upon the organized Jewish community to convey information and impressions about their camps. The effectiveness of using second parties to do the majority of a camp's marketing and messaging needs to be examined more closely.

TABLE 11: REASONS AGAINST SENDING CHILDREN TO JEWISH OVERNIGHT CAMP

	EVER ATTENDED ONLY JEWISH CAMP	EVER ATTENDED JEWISH AND NON-JEWISH CAMP	EVER ATTENDED NON-JEWISH CAMP	NEVER BEEN AN OVERNIGHT CAMPER	TOTAL
COSTS TOO MUCH	29%	33%	16%	42%	34%
MY CHILD'S FRIENDS WILL NOT BE THERE	20	35	35	12	22
NOT INTERESTED IN SUMMER CAMP, BE IT JEWISH OR NON-SECTARIAN	14	26	3	27	20
THE QUALITY OF THE CAMP FACILITIES IS NOT GOOD	17	33	19	11	18
IT'S "TOO JEWISH"	11	26	22	14	17
THE QUALITY OF THE RECREATIONAL ACTIVITIES IS NOT VERY GOOD	23	28	11	10	16
I DO NOT KNOW MUCH ABOUT JEWISH OVERNIGHT CAMPS	3	28	3	11	12

Obstacles for Some: High Cost and Few Friends

Parents were asked to assess "hesitat[ing] to send your child to a Jewish overnight camp." As in the previous findings, cost was clearly the main reason among parents who have never enrolled their children at overnight camps (see Table 11). Among parents whose children have attended only non-Jewish camp, the main reason cited was that their child's friends would not be there, followed by "it's too Jewish," and inadequate facilities.

Who are the Cost-sensitive Parents?

Cost is a critical barrier, particularly for those currently outside of the camping market altogether. In light of this finding, it behooves us to examine which parents, in particular, are most sensitive to cost.

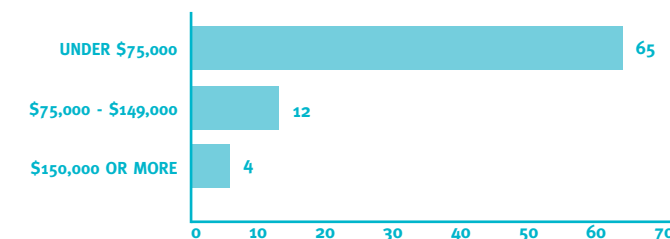
We constructed an index to measure cost sensitivity regarding Jewish summer camping by drawing upon survey questions that reflect affordability concerns. This index combines responses to the following questions (abbreviated):

- How much of a role did/will finances play in your decision...Is it an important factor?
- Is a persuasive or main reason against sending your child to Jewish camp the fact that it may cost too much?
- Camps charge about \$4000 for four weeks.... Would you find it difficult to justify that expenditure?

Clearly, someone answering all three questions in the same direction feels hard-pressed to pay for camping, and/or finds relatively little value in Jewish summer camping. Accordingly, this analysis revealed three characteristics of respondents for whom cost was a major sensitivity:

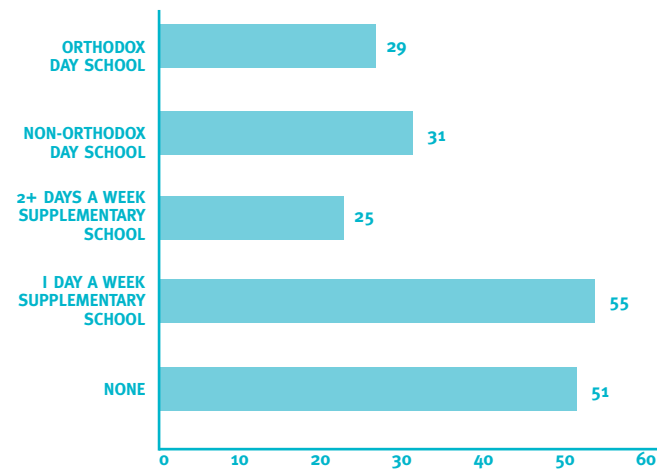
- Relatively lower income
- Have never sent their child to an overnight camp of any kind
- Lower levels of Jewish engagement.

FIGURE 13: PARENTS EXHIBITING COST SENSITIVITY AS A FUNCTION OF INCOME



FINDINGS

FIGURE 14: PARENTS EXHIBITING COST SENSITIVITY AS A FUNCTION OF THEIR CHILD'S JEWISH SCHOOLING



Consistent with this latter claim, cost sensitivity is particularly high among the intermarried, those whose children receive little or no Jewish schooling, and those who neither belong to a congregation nor send their children to Jewish day school (see Table 12).

Thus, those who combine low income with little Jewish engagement, and who have little immediate connection to Jewish (or other) camping are most likely to feel that Jewish summer camping does not offer value commensurate with cost. Conversely, those most willing to pay the fees associated with Jewish summer camping are among a more affluent group (above \$150,000) who have also demonstrated higher levels of Jewish engagement.

Parents demonstrating other combined characteristics (with respect to income, Jewish engagement, and camping exposure) will report, on average, intermediate levels of cost sensitivity.

TABLE 12: COST SENSITIVITY SCORES BY INCOME, MARITAL STATUS, JEWISH SCHOOLING, SYNAGOGUE MEMBERSHIP, AND TYPE OF CAMP ATTENDED

COST SENSITIVITY (I.E. PERCENT SCORING "HIGH" ON THE COST SENSITIVITY SCALE)	
INCOME	
UNDER \$75K	65%
\$75K-\$149,999	54
\$150K+	27
MARITAL STATUS	
IN-MARRIED	38
INTERMARRIED	68
NOT MARRIED	58
JEWISH SCHOOLING	
ORTHODOX DAY SCHOOL	29
NON-ORTHODOX DAY SCHOOL	31
2+ DAYS A WEEK SUPPLEMENTARY SCHOOL	25
1 DAY A WEEK SUPPLEMENTARY SCHOOL	55
NONE	51
TOTAL	41
SYNAGOGUE MEMBERSHIP	
SYNAGOGUE MEMBER	46
NEITHER SYNAGOGUE MEMBER NOR DAY SCHOOL	55
TYPE OF CAMP	
EVER ONLY ATTENDED JEWISH CAMP	31
EVER ATTENDED JEWISH AND NON-JEWISH CAMP	31
EVER ONLY ATTENDED NON-JEWISH CAMP	24
NEVER BEEN AN OVERNIGHT CAMPER	56
TOTAL	41

FINDINGS

Non-campers May be Open to One-week Trials

Parents were also asked to specify a preferred duration of a Jewish summer camp experience. Those who have already sent their children to Jewish or non-sectarian summer camps indicate a preference for four-week camp sessions (see Table 13). In contrast, those with no camping experience preferred one- or two-week sessions. Such results raise the possibility that one-week camp experiences for new camping families may serve to introduce such families to the virtues of Jewish summer camping.

Qualitative interviews provided similar observations:

One parent mentioned that, because of family vacation time and other obligations, she could only send her child to camp for two weeks and that this was not an option for the Jewish overnight camps (i.e., four weeks was the shortest session). Bottom line: Length of available sessions may be a contributing factor obstructing participation in Jewish camps.

TABLE 13: CAMPER WEEKS BY CAMP ATTENDANCE

	EVER ATTENDED ONLY JEWISH CAMP	EVER ATTENDED JEWISH AND NON-JEWISH CAMP	EVER ATTENDED ONLY NON-JEWISH CAMP	NEVER BEEN AN OVERNIGHT CAMPER	TOTAL
1 WEEK	9%	25%	15%	42%	28%
2 WEEK	21	27	21	41	31
3 WEEK	21	17	3	8	11
4 WEEK	36	17	47	10	22
5-8 WEEK	12	15	15	0	8
TOTAL	100%	100%	100%	100%	100%

SUMMARY

This study presents a detailed portrait of Toronto families who enroll their children in Jewish overnight camps, non-sectarian camps, both, and neither. The study's objective was to help the Jewish overnight camps that serve this population better understand their market in order to develop effective marketing strategies and expand their clientele.

The major conclusions of the study are as follows:

- A significant minority of Jewish families in Greater Toronto send their children to Jewish camps. It is likely that about half the Jewish children attend such a camp by the time they reach their adolescence. Jewish camps compete with non-Jewish camps and specialty camps, all of which are non-sectarian in sponsorship, and seem to hold a special appeal to a major segment of the Jewish camper market. Of all those attending Jewish camps in 2008, 25% also attended a non-sectarian camp. This dual-camp group represents 6% of the total.
- More girls than boys attend Jewish camps. This finding corresponds to the gender gap in Jewish life. By adolescence, girls are more involved in Jewish life than boys, and the preponderance of girls and women in Judaism matches the preponderance of girls in Jewish summer camps that serve Greater Toronto.
- More boys than girls attend non-sectarian camps. This finding hints that changes in program offerings and facilities at Jewish summer camps to make them more competitive with non-sectarian specialty camps may attract more boys to Jewish summer camp.
- Participation in Jewish camping peaks at ages 10–11 and then begins to decline with those aged 12–14. Jewish adolescents past the age of 13 increasingly disengage in Jewish life, which is a pattern mirrored in other religious groups.
- This drop-off in camper retention is not paralleled in non-sectarian camps. Jewish summer camp directors may want to learn from their non-sectarian camp colleagues how they can keep campers longer.
- In general, affluent families send their children to camp more often than the less affluent. Moreover, in comparing high and low affluence (incomes above or below \$150,000), Jewish camp use grows slightly from 25% to 27%. In contrast, non-sectarian camp use nearly doubles, moving from 19% to 34%.
- Youngsters from homes that are more engaged in Jewish life are far more likely to attend Jewish summer camps than are those with weaker Jewish connections. Specifically, children of in-married Jews and Jews who are synagogue members attend Jewish camps more frequently.
- Rough parity exists among campers from Orthodox, Conservative, and Reform families, with Reform respondents reporting the highest levels of Jewish camp use of all three major denominations by a small margin. This possibly reflects greater affluence and the highest level of camp use (Jewish or non-sectarian) overall.
- Youngsters who attend supplementary school two or more times per week are the most frequent Jewish summer campers. These children outscore all other youngsters in attending Jewish camps, even those who attend day schools. The parents of supplementary school youngsters (who may have no tuition expenses other than synagogue membership dues) very well may feel they have more disposable income available to finance their children's Jewish education than do day school parents who are already paying substantial tuition.

SUMMARY

- Parents seeking a summertime Jewish educational experience were far more likely to turn to Jewish camps for their children. These are parents who are seeking Jewish education, or Jewish campers and staff (Jewish association), or Israeli connections (staff or programming).
- The extent to which parents have good (or bad) impressions of their personal Jewish camp experience is important for understanding the context in which Jewish camping is advocated and communicated. In general, parents who went to Jewish camps as children have fond recollections. However, parents who attended non-sectarian camps with significant Jewish camper populations are even fonder of their experiences.
- For parents who have never provided their children with a Jewish camp experience, two reasons emerged as the most persuasive motivators: fun and personal growth. Five reasons stood out as especially important objections to enrolling children in Jewish overnight camps, including: too much time is spent praying; my child should just have fun over the summer; my child should be exposed to all kinds of kids, not just Jews; it costs too much; and there are not enough quality sports and outdoor activities.
- The non-sectarian camp clientele seeks quality recreation for their children and seem to believe that they can find it more readily in non-sectarian versus Jewish camp offerings that serve the Toronto area. Camping decisions are based on facilities and activities. Incentives and the use of persuasive arguments as to how and why Jewish camps can provide Jewish educational experiences may not be effective in reaching this group.
- Most parents learn about overnight camps from their friends, their children's friends' parents, and family, and rely on word-of-mouth recommendations. The Internet follows as the next most frequently used source of information. Two differences between "Jewish-only" and "non-sectarian-only" camp parents are noteworthy. The latter report somewhat higher rates of receiving information about their camps from camp promotional materials, and far higher rates of personal contact and learning about camp directly from camp directors. This finding suggests an area that could use improvement among Jewish camp directors.
- The parents most sensitive to cost are those with relatively lower income, those with little Jewish engagement, and those who have little immediate connection to Jewish or other camping. They are most likely to feel that Jewish summer camping does not offer value commensurate with cost. Conversely, those who are more affluent, have higher levels of Jewish engagement, and who are highly connected to Jewish camping are among the most able and willing to pay for Jewish summer camps.
- Of those who have already sent children to Jewish or non-sectarian summer camps, the majority prefer four-week camp sessions. In contrast, those with no camping experience preferred one- or two-week sessions.

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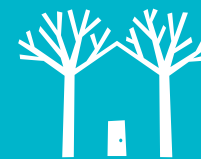
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