OVERNIGHT JEWISH CAMP IN NORTH AMERICA 2018

HIGHLIGHTS FROM

FOUNDATION FOR JEWISH CAMP

2018 CAMP CENSUS

ABOUT THE 2018 CAMP CENSUS

The 2018 Overnight Camp Census reports several important features of the nonprofit overnight Jewish camp sector in North America. The ninth annual Overnight Census was conducted by the Foundation for Jewish Camp (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 focuses on some key measures of overnight Jewish summer camps: the campers and enrollment patterns, revenues, expenditures and more. It differentiates among camps of varying size by numbers of campers and budget, as well as denominations, movements and regions of North America.

On occasion, the text below refers to comparisons with previous censuses, implemented and reported on by JData through 2015, and reported by Prof. Steven M. Cohen in 2016 and 2017. Generally, the estimated changes were small and incremental year over year. Knowing that small changes are barely visible and out of concern for some challenges to comparability between the 2018 and earlier Census reports, this text focuses on the most notable findings from 2018 (drawing only occasional comparisons with the prior Census reports).

This report refers to camping “Movements.” On the Census questionnaire, camps reported their movement affiliations. Throughout this report, we have combined a few of the responses, in part, to increase the sample size in a few categories. Thus, “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 for comparisons.

In 2018, 166 overnight camps comprised the FJC network, which is a net increase of six camps from 2017. This increase is primarily the result of opening six new overnight camps as part of FJC’s Specialty Camp Incubator III. 156 camps completed the Census questionnaire in time to be part of this analysis, and 3 additional camps 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 2017 (or 2015 or 2016, if there was no 2017 submission). In a few instances, based on available information, we slightly adjusted these imputed estimates.

CAMPER ENROLLMENT

Slow, steady growth: In 2018, 166 nonprofit Jewish overnight camps served a total of 81,146 unique campers, an increase of 1% as compared with 80,484 in 2017. Please note that the 2017 enrollment number has been adjusted, as this data was refined through improved methods within the 2018 Census.

Camp Enrollment

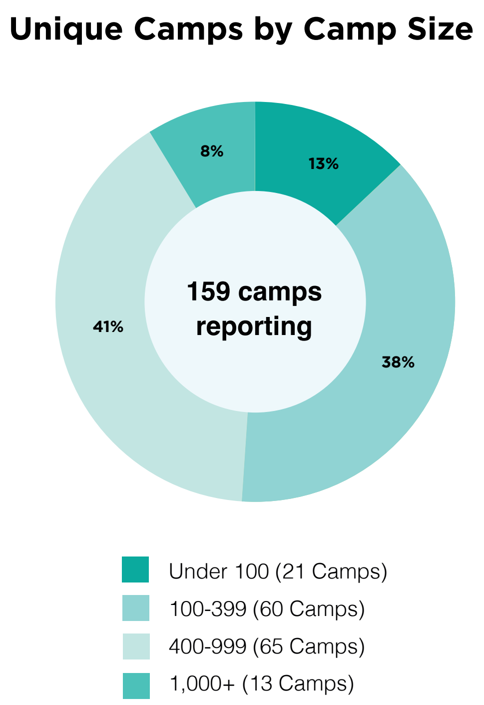
	Number of Camps	Total Number of Campers
2018	166	81,146
2017	160	80,484
2008	142	68,399

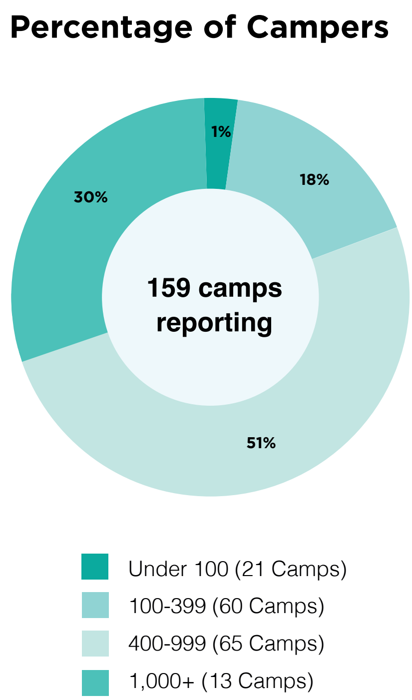
In the last decade, from 2008 to 2018, we have seen a steady rise in campers, camps, and the number of campers per camp. The number of campers has grown by 19%, with the number of camps growing 17%. These signs of continued vitality are especially impressive in an era when most other indicators of Jewish engagement outside of Orthodoxy remain stagnant or are declining, and when the number of non-Orthodox children who identify as Jewish continues to decline.

NEW SPECIALTY CAMPS

One significant development to support growth of the field has been the introduction of 17 new Jewish specialty overnight camps since 2010. Close to 10,000 campers have participated in one of these camps in the last nine years, and according to research, more than half of these campers would not have otherwise attended Jewish camp. In 2018, the six newest specialty camps opened; in conjunction with the eight specialty camps previously launched and still in operation, these camps served more than 3,700 campers in 2018.

CAMPS BY SIZE





Compared to 2017, we have seen growth in the middle range of camps, sized (between 100 and 999 campers) from 111 in 2016 to 125 camps in 2018. There were 21 camps that reported enrollment under 100 in 2018, while 16 camps reported under 100 in 2017. These changes may be due to the introduction of specialty camps.

Half of the camps report 400 or more unique campers throughout the summer. The number of campers is concentrated in the larger camps. About 30% of the campers attend camps of 1,000 campers or more; another 51% attend camps serving 400-999 campers; 18% are at camps with 100-399 campers and just 1% at the 21 smallest camps. When comparing these percentages to the 2017 ratios, it seems that the large camps continue to get larger, and the small camps are getting smaller.

Wide variations in revenue size: As we also saw in 2016 and in 2017, the wide variation in size of camp is consistent with wide variation in revenue size. Notably, only 140 of the 159 camps that participated in the Census this year reported their total camp revenue. 30% of these camps report total revenue of under $800,000 annually, with 36% reporting revenue of $2.5 million or more, and 34% between $800,000 and $2.5 million.

Camps by Total Revenue

	Number of Camps	Percent
Under $800,000	42	30%
$800,000 thru $2.5 million	50	36%
$2.5 million or more	48	34%
TOTAL	**140**	**100%**

Pluralist, Reform and Orthodox continue to be the largest camp denominations:
The Census questionnaire asked for the camps' denominational identity with the following question and definition: "With respect to denomination or movement, how does your camp primarily define itself? Denomination refers to the orientation of the camp itself, and not the religious identities of its campers."

Overall, 30% of the camps identified as "Pluralist or non-denominational." These camps represented 36% of all of the campers. These percentages are about the same as 2017, but the percentage of pluralistic camps increased from 20% in 2016. This change could be due to a shift in how many camps define and target their community, or be connected to the increase in specialty camps. Orthodox and Reform are the next largest groups, while Zionist and Conservative camps are smaller in number yet constitute significant growth from the last two years largely at the expense of "community" and "other" camp identities.

These figures can be examined next to the percent of campers attending camps associated with each denomination.

Camps and Campers by Denominational Identity

Denomination	Number of Camps	Percentage of Camps	Percentage of Campers
Orthodox	40	25%	23%
Conservative	11	7%	8%
Reform	24	15%	16%
Zionist	19	12%	7%
Pluralist or Non-Denominational	47	30%	36%
Community	10	6%	7%
Other*	8	5%	3%
TOTAL	**159**	**100%**	**100%**

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

The Census tracks movement affiliation. The JCCA operates generally the large, community-based camps, serving 27% of the campers. Camps with no affiliation serve 17% of the campers, while camps affiliated with the URJ served 13% and camps affiliated with an Orthodox movement also served 13%.

Camps and Campers by Camping-Movement

	Number of Camps	Percentage of Camps	Percentage of Campers
Orthodox	16	10%	13%
Ramah	10	6%	8%
URJ	18	11%	13%
Zionist	8	5%	2%
JCCA	26	16%	27%
Chabad	11	7%	3%
Young Judaea	10	6%	5%
AIJC	19	12%	12%
Other	41	26%	17%
TOTAL	**159**	**100%**	**100%**

Regional data suggests the concentration in the Northeast continues to hold steady: As was the case in 2017, almost half of the camps and campers are in the Northeast and about a sixth of each (of camps and of campers) are found in the West. The South is still the region with the smallest number of camps and campers. However, as seen below, the South continued to have the highest utilization throughout the entire summer.

Camps and Campers by Region

	Number of Camps	Percentage of Camps	Percentage of Campers
Northeast	70	44%	49%
Midwest	23	14%	15%
West	29	18%	15%
South	12	8%	9%
Canada	25	16%	11%
TOTAL	**159**	**100%**	**100%**

CAMPER WEEKS

Larger camps sold more camper weeks. 24% of camps reported that they sold more camper weeks in 2018 than in 2017. 15% of camps reported that they sold fewer camper weeks this year than last year, and 61% reported no change in the number of camper weeks sold. JCCA camps were the most likely to report an increase in the number of camper weeks sold, whereas Zionist camps were most likely to report a decrease from last year.

Change in the Number of Camper Weeks Sold by Camping Movement

	Fewer Camper Weeks	No Change	More Camper Weeks
Orthodox	6%	81%	13%
Ramah	0%	80%	20%
URJ	17%	67%	17%
Zionist	15%	13%	13%
JCCA	18%	46%	38%
Chabad	20%	73%	9%
Young Judaea	21%	60%	20%
AIJC	5%	58%	21%
Other	15%	63%	32%
TOTAL AVERAGE	**15%**	**61%**	**24%**

Larger camps were more likely to report that they sold more camper weeks in 2018 than in 2017, and smaller camps were more likely to report that they sold fewer. In fact, almost one third of large camps---those that serve more than 1,000 campers---reported an increase in camper weeks sold, compared to only increases in campers weeks at only 14% of the smallest camps---with 100 or fewer campers. In contrast, nearly one fifth of the smallest camps reported a decrease in the number of camper weeks sold, but none of the camps that serve more than 1,000 campers reported a decrease compared to the number of camper weeks sold in 2017.

Change in the Number of Camper Weeks Sold by Size

	Fewer Camper Weeks	No Change	More Camper Weeks
Under 100	19%	67%	14%
100-399	22%	57%	22%
400-999	11%	62%	28%
1000+	0%	69%	31%
TOTAL AVERAGE	**15%**	**61%**	**24%**

More than half of all camps sold the same number of camper weeks, regardless of camp size or revenue.

Change in the Number of Camper Weeks Sold by Total Revenue

	Fewer Camper Weeks	No Change	More Camper Weeks
Under $800,000	24%	55%	21%
$800,000 thru $2.5 million	14%	62%	24%
$2.5 million or more	13%	62%	27%
TOTAL AVERAGE	**16%**	**59%**	**24%**

CAMPER RETENTION

High Camper Retention. On the 2018 Census, retention was measured using percentage ranges. Camps were asked to share the percentage range of 2017 campers who were eligible to return and did in fact come back to camp for summer 2018, and responded with one of the increments listed below.

In 2018, 16% reported a retention rate of over 90%, and 40% of camps reported a retention rate of over 80%. This 2018 finding, indicating that 56% of camps retained 80% or more of their 2017 campers, mirrors what FJC learned through the 2017 One Happy Camper® (OHC) Retention Study confirming camper retention rates of over 80%. "The return rate for the first summer immediately following [receiving] the [OHC] incentive is extremely high. 87% sent their children to camp for a second summer. This is based on the aggregated results across all four years' OHC recipients. There is little variation within each individual OHC recipient cohort, ranging from 85-89%," (One Happy Camper® Retention Study, Summation Research).

In the tables below, retention rates are grouped by range, and percentages of camps that placed their retention rates within one of those ranges are described by size and denomination. Most notably, in the second table describing the ranges by denomination, Conservative camps had the highest retention rate (at or above 80%).

Camper Retention by Size

	< 60%	60%-69%	70%-79%	80%-89%	90%-100%
Under 100	52%	24%	10%	10%	5%
100-399	13%	20%	33%	15%	18%
400-999	3%	17%	28%	32%	20%
1000+	0%	15%	38%	38%	8%
TOTAL AVERAGE	**13%**	**19%**	**28%**	**23%**	**16%**

Camper Retention by Denomination

	< 60%	60%-69%	70%-79%	80%-89%	90%-100%
Orthodox	25%	23%	23%	13%	18%
Conservative	9%	9%	18%	45%	18%
Reform	17%	21%	25%	29%	8%
Zionist	0%	11%	42%	11%	37%
Pluralist or Non-Denominational	11%	19%	28%	28%	15%
Community	0%	20%	50%	30%	0%
Other*	13%	25%	25%	25%	13%
TOTAL AVERAGE	**13%**	**19%**	**28%**	**23%**	**16%**

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

Regionally, the Midwest camps have the strongest retention at or above 80%. Camps in the West camps have showed steady retention over the years, but continue to have the lowest retention rate. The camps in the West tend to offer shorter sessions than in other regions, which attracts campers to participate in multiple summer experiences.

Camper Retention by Region

	< 60%	60%-69%	70%-79%	80%-89%	90%-100%
Northeast	17%	13%	27%	21%	21%
Midwest	9%	17%	26%	43%	4%
West	17%	38%	24%	17%	3%
South	17%	17%	25%	33%	8%
Canada	0%	16%	40%	12%	32%
TOTAL AVERAGE	**13%**	**19%**	**28%**	**23%**	**16%**

CAPACITY UTILIZATION

Higher utilization rates in larger camps, and early in the summer: A new method was used to measure capacity utilization in 2018. Each camp was asked to estimate their capacity utilization over the summer in week-long increments (week 1, week 2, week 3…and, finally, the average of week 8 and every week thereafter). The other variation in 2018 was that the Census only asked about utilization by providing percentage ranges. Those ranges are listed below.

Over one third of all potential weeks of the summer were reported over 90% full.

Overall Utilization

Camping-Movement	Percentage
90%-100% Full	36%
80%-89% Full	19%
60%-79% Full	17%
< 60% Full	10%
No Camp	18%
TOTAL	**100%**

During the first week of camp, 78% of camps report capacity utilization of 80% or more and only 12% of camps report capacity utilization of less than 60%, or no camp in session. By the 8th week or after, only 24% of camps report utilization of 80% or more and 65% report no camp in session.

As illustrated by the below table, there are fewer campers opting for more than seven or eight (plus) weeks, and/or staying later in the summer. It is also possible that fewer camps are running late summer sessions.

Average Percentage Utilized by Week of Camp

	1st	2nd	3rd	4th	5th	6th	7th	8th+
90%-100% Full	45%	45%	42%	39%	37%	38%	25%	13%
80%-89% Full	23%	23%	21%	19%	19%	18%	17%	11%
60%-79% Full	19%	22%	22%	23%	16%	14%	13%	6%
< 60% Full	11%	8%	9%	10%	14%	15%	11%	4%
No Camp	1%	1%	6%	9%	14%	15%	34%	65%

During the first week of summer, 45% of all camps estimated their utilization to be over 90% of capacity. This utilization rate was highest among camps that served 400 to 999 campers (with 60% of these camps reporting a utilization of 90% or higher). By the seventh week of the summer, few camps that served less than 400 campers reported a utilization of 90% or higher, but more than half of camps that served 400 or more campers continued to report that their utilization was 90% to 100% of capacity. These patterns largely replicate those found in 2016 and 2017, although those ratios were measured slightly differently.

Percent of Camps with 90% to 100% Utilization by Week and by Size

	1st	2nd	3rd	4th	5th	6th	7th	8th+
Under 100	24%	29%	19%	10%	0%	0%	0%	0%
100-399	37%	35%	32%	28%	22%	20%	2%	2%
400-999	60%	60%	55%	54%	57%	60%	49%	23%
1000+	46%	46%	54%	62%	69%	69%	54%	38%
TOTAL AVERAGE	**45%**	**45%**	**42%**	**39%**	**37%**	**38%**	**25%**	**13%**

On a regional level, camps in the Northeast and Canada were most likely to report running at or near full capacity during the beginning of the summer. Camps in the South were most likely to report running at or near full capacity throughout the entire summer.

Percent of Camps with 90% to 100% Utilization by Week and by Region

	1st	2nd	3rd	4th	5th	6th	7th	8th+
Northeast	56%	57%	50%	50%	44%	44%	33%	14%
Midwest	17%	17%	22%	26%	39%	39%	22%	13%
West	24%	24%	31%	24%	28%	34%	21%	7%
South	42%	42%	33%	33%	58%	50%	33%	33%
Canada	68%	64%	52%	40%	16%	16%	8%	8%
TOTAL	**45%**	**45%**	**42%**	**39%**	**37%**	**38%**	**25%**	**13%**

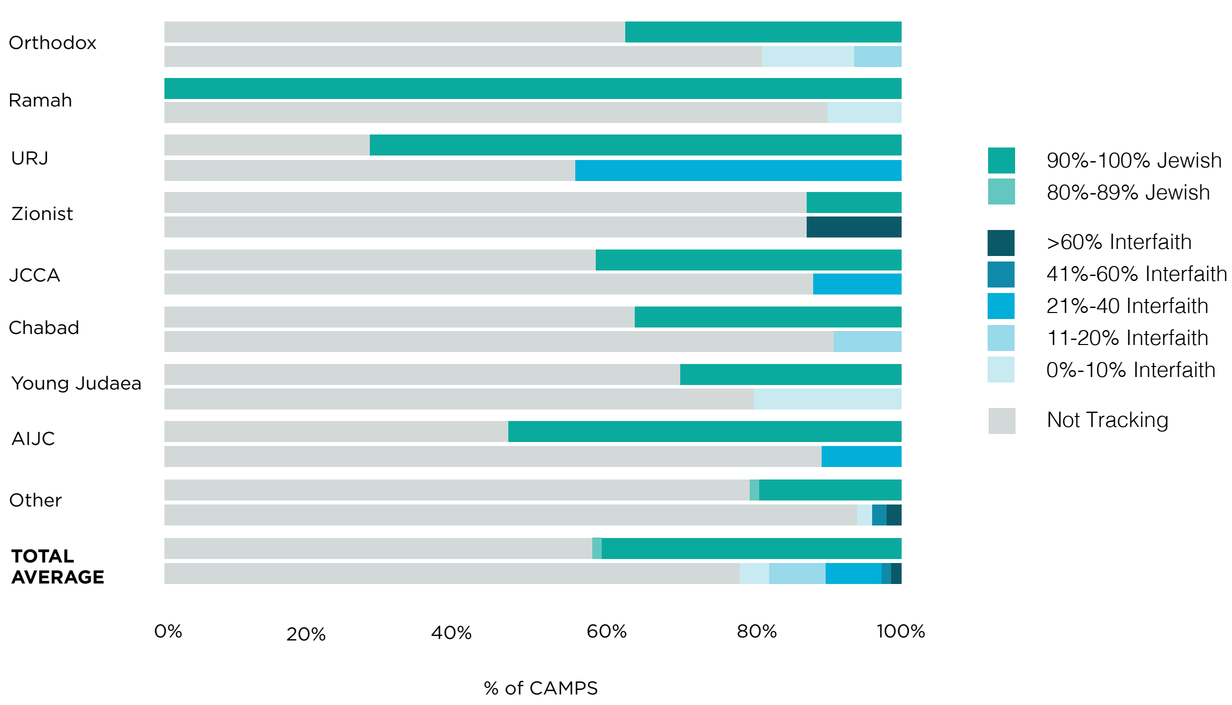
CAMPER IDENTITY

Campers who identify as Jewish, or from interfaith or multi-faith families: In 2018, the Census questionnaire asked about religious identity differently than ever before. The questionnaire still 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). However, before asking those specific questions, the questionnaire shifted to ask if the camp collects data on religious identities of campers, or if the camp tracks if campers come from interfaith or multiple-faith homes. Only camps who shared that they are specifically tracking such data were invited to share percentages of their campers who identify as Jewish or come from interfaith or multiple-faith homes.

43% of camps reported that they collect data on campers' religious identities, and less than half of those camps track if their campers come from interfaith or multi-faith homes. 58% of camps do not collect data on campers' religious identities and are not tracking if campers come from interfaith or multi-faith homes.

In all cases but one, camps that do specifically ask their campers' religious identities estimate that between 90% and 100% of all of their campers identify as Jewish in 2018. In 2017, respondents reported that about 91% of their campers identified as Jewish.

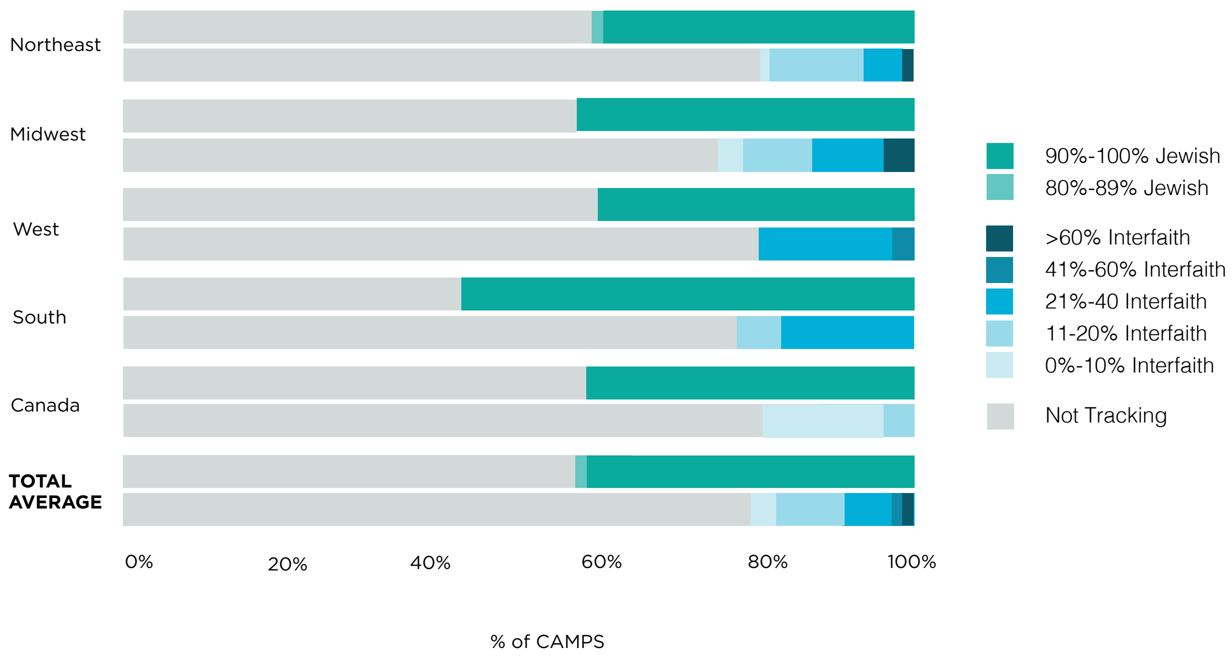
Percent of Campers Indentified as Jewish and as Interfaith by Movement



Only about one fifth of camps track campers who come from interfaith or multi-faith homes. The specific concentration of camps that track if campers come from interfaith or multiple-faith homes are the URJ camps. The URJ reported that less than 40% of their campers come from interfaith or multi-faith families.

Campers from interfaith homes are less numerous in the Northeast, Midwest and Canada, higher in the South (19%) and highest in the West (24%), reflecting the regional variations in the larger population. 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 2018 camper population.

Percentage of Campers Identified as Jewish and Interfaith by Regoin



GENDER VARIATION

Gender findings similar to 2017: The Census asked camps to share numbers of campers by the gender with which the campers identified. For the first time, the 2018 questionnaire offered a "Gender Non-Binary" option. Overall, 53% of campers were identified as female, 47% were identified as male, and less than 1% were identified as Non-Binary. This is a similar breakdown to 2017.

Gender Identity of Campers by Movement

	% Identified as Female	% Identified as Male	% Identified as Non-Binary
Orthodox	55%	45%	0%
Ramah	52%	48%	0%
URJ	53%	47%	0%
Zionist	53%	47%	1%
JCCA	52%	47%	1%
Chabad	47%	53%	0%
Young Judaea	55%	45%	0%
AIJC	55%	45%	0%
Other	49%	51%	0%
TOTAL AVERAGE	**53%**	**47%**	**0%**

There were higher ratios of campers identified as female in camps that serve less than 100 campers (56%) and in camps that serve between 400 and 1000 campers (54%). Overall, less than 1% of campers identify as non-binary.

Gender Identity of Campers by Size

	% Identified as Female	% Identified as Male	% Identified as Non-Binary
Under 100	56%	43%	1%
100-399	50%	50%	0%
400-999	54%	46%	0%
1000+	51%	48%	1%
TOTAL AVERAGE	**53%**	**47%**	**0%**

The 2018 Census indicated that the percentage of campers identified as female is highest in the Midwest. The percentage of campers identified as female is lowest in the South and in Canada.

Gender Identity of Campers by Region

	% Identified as Female	% Identified as Male	% Identified as Non-Binary
Northeast	53%	47%	0%
Midwest	54%	46%	0%
West	52%	46%	1%
South	50%	50%	0%
Canada	51%	49%	0%
TOTAL AVERAGE	**53%**	**47%**	**0%**

CHILDREN WITH DISABILITES

Serving children with disabilities: 106 camps served over 3,970 children with disabilities, or 5.2% of the total number of campers. This represents an increase of almost 17% over the number of children with disabilities that were served in 2017 as well as an increase from 85 camps serving campers with disabilities. This increase can be attributed to a combination of more campers with disabilities being served, and more camps tracking the number of campers with disabilities.

Of the 3,970 children with disabilities served in the summer 2018, 69% of these children attended one of the 50 camps in the Northeast that offer partial or full inclusion for children with disabilities. Ten camps (and four in the Northeast alone) reported offering two inclusion programs---both partial and full inclusion programs, and are therefore counted within both relevant categories in the tables below.

Five camps responded that they did serve campers with disabilities, but did not share additional data on their programs or the number of campers with disabilities they served.

Number of Campers with Disabilities Served by Region

	Number of Camps Serving Campers with Disabilities	% of Campers with Disabilities	Number of Campers with Disabilities	At Camps that Provide Partial Inclusion	At Camps that Provide Full Inclusion	At Camps with Only Campers with Disabilities
Northeast	50	69%	2,726	975	1,613	753
Midwest	14	9%	360	181	324	66
West	17	12%	481	175	466	0
South	11	7%	264	62	244	0
Canada	14	4%	139	74	52	15
TOTAL	**106**	**100%**	**3,970**	**1,467**	**2,699**	**834**

Even with the increase, the proportion of campers with disabilities is still far below the percent of children with disabilities in the Jewish population, which is believed to be 15-20%.

Examining inclusion by denomination showed that Orthodox camps had the highest rate of inclusion of children with disabilities --- at almost 9% of campers. These statistics are highly influenced by the handful of Orthodox camps that are fully devoted to servicing campers with disabilities.

Proportion of Campers with Disabilities by Denomination

	% of Campers with Disabilities
Orthodox	8.8%
Conservative	3.6%
Reform	5.1%
Zionist	4.1%
Pluralist or Non-Denominational	3.9%
Community	3.4%
Other*	2.1%
TOTAL AVERAGE	**5.2%**

Inclusion Level of Campers with Disabilities by Denomination

Camping-Movement	Partial	Full	Camps with Only Campers w/ Disabilities	Total Count
Orthodox	4	16	4	22
Conservative	6	5	0	9
Reform	3	16	0	18
Zionist	1	9	0	10
Pluralist or Non-Denominational	8	32	2	38
Community	2	5	0	6
Other*	1	3	0	3

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

Regionally, camps in the Northeast report the highest rates of inclusion for campers with disabilities. The campers in the Northeast who have disabilities account for over 7% of all of the campers who attended camps in the Northeast.

Proportion of Campers with Disabilities by Region

	% of Campers with Disabilities
Northeast	7.2%
Midwest	3.1%
West	4.0%
South	3.8%
Canada	1.6%
TOTAL AVERAGE	**5.2%**

Two thirds of all of the responding camps offer some level of inclusion to campers with disabilities. Of these, almost half (50) are located in the Northeast, where 10 camps reported that they offer partial inclusion to campers with disabilities, 40 camps reported that they offer full inclusion, and 10 camps with both partial and full inclusion.

Inclusion Level of Campers with Disabilities by Region

	Partial	Full	Camps with Only Campers w/ Disabilities	Total Count
Northeast	10	40	2	50
Midwest	3	12	3	14
West	4	16	0	17
South	3	9	0	11
Canada	5	9	1	14
TOTAL	**25**	**86**	**6**	**106**

The level of inclusion varies by the size of the camp. Of the 13 camps with less than 100 campers that do have campers with disabilities, all of them either are fully inclusive to campers with disabilities or exclusively have campers with disabilities.

In contrast, of the 12 camps with over 1,000 campers that have campers with disabilities, half report that they are only partially inclusive (meaning that campers with disabilities participate in some activities with other campers without disabilities).

Inclusion Level of Campers with Disabilities by Size

	Partial	Full	Camps with Only Campers w/ Disabilities	Total Count
Under 100	10	12	2	13
100-399	4	31	1	35
400-999	15	35	2	46
1000+	6	8	1	12
TOTAL	**35**	**86**	**6**	**106**

Slightly more than half of the campers with disabilities attended a camp that was partially wheelchair accessible, and an additional quarter of campers with disabilities attended a camp that is fully wheelchair accessible.

About 12% of campers with disabilities attended a camp that charges parents additional fees to accommodate a camper with disabilities.

Overall, about 40% of campers with disabilities attended a camp that identified as Orthodox, and 78% of campers with disabilities that are at a wheelchair accessible camp are at an Orthodox camp.

Accessibility for Campers with Disabilities by Denomination

	Number of Camps	Number of Campers with Disabilities	Number of Campers with Disabilities at Camps that Have an Inclusion Coordinator	Number of Campers with Disabilities at Camps that Have Additional Fees	Number of Campers with Disabilities at Camps That Are Fully Wheelchair Accessible	Number of Campers with Disabilities at Camps That Are Partially Wheelchair Accessible
Orthodox	22	1,585	1,484	143	758	673
Conservative	9	235	235	142	0	173
Reform	18	613	603	17	53	520
Zionist	10	236	52	0	0	92
Pluralist or Non-Denominational	38	1,077	968	154	153	637
Community	6	180	171	36	0	113
Other*	3	44	40	0	2	0
TOTAL	**106**	**3,970**	**3,553**	**492**	**966**	**2,208**

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

Vocational programs may be connected to having an Inclusion Coordinator. 27 camps reported that they have a vocational program, 63 reported that they have an Inclusion Coordinator, and 21 reported that they have both. Of the 27 camps that have a vocational program, 80% of those camps also have an Inclusion Coordinator on staff. Orthodox and Ramah camps with vocational programs all have Inclusion Coordinators.

Relationship between Camps with an Inclusion Program and Camps that have a Vocational Program, by Movement

	Have a Vocational Program	Have an Inclusion Coordinator	Have Both
Orthodox	6	6	4
Ramah	8	9	8
URJ	2	14	2
Zionist	0	1	0
JCCA	5	11	5
Chabad	2	2	0
Young Judaea	1	1	0
AIJC	1	10	0
Other	2	9	2
TOTAL	**27**	**63**	**21**

STAFF

Thousands of staff members throughout North America: The 159 responding camps employ 1,210 year round staff and more than 23,500 summer only paid staff (including over 12,000 college-age counselors). This total of 24,751 staff members is about 16% higher than the number of staff reported in 2017, which was 21,385. The increase in staff numbers may be a result of a combination of improved tracking on behalf of the camps, and the hiring of more staff.

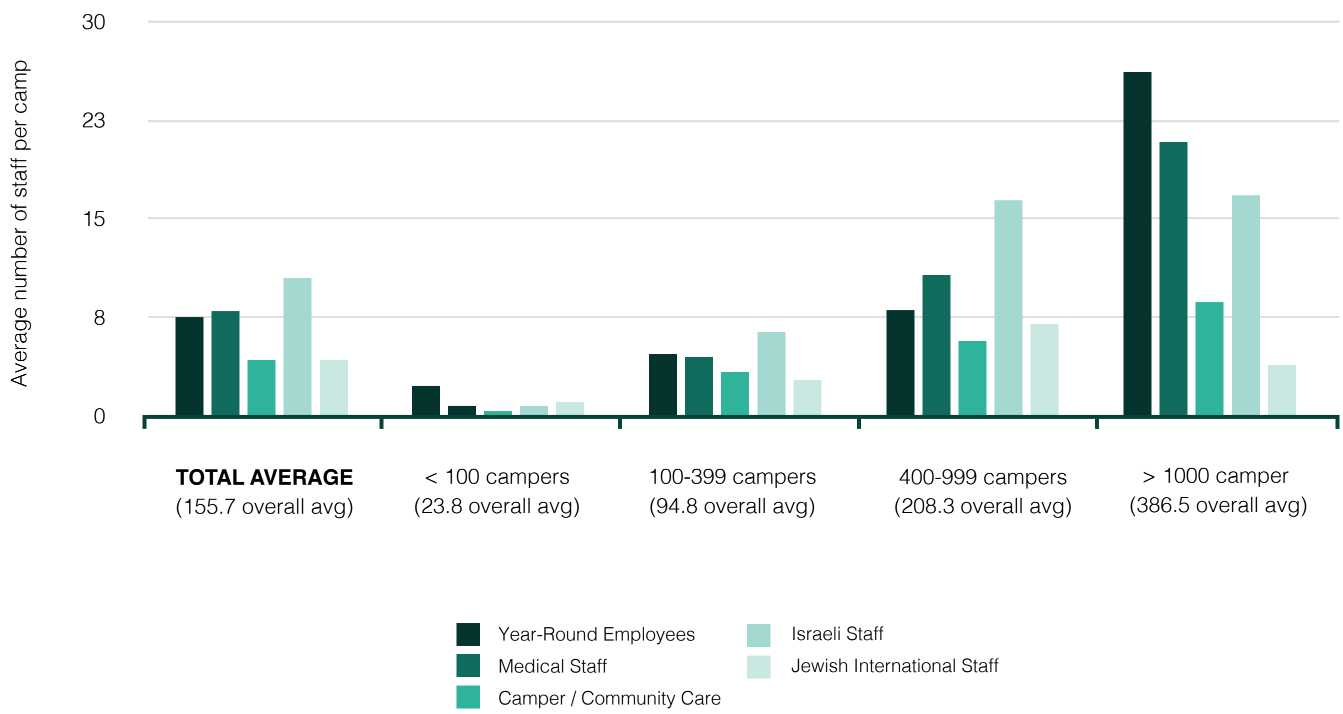
The average number of staff in all categories rises with size of camp, measured by campers or by revenue. On average, camps employ 3.1 staff members in all (full-time & part-time, year-round and summer only---in all capacities) for every unique camper.

Staff-to-Camper Ratios by Movement

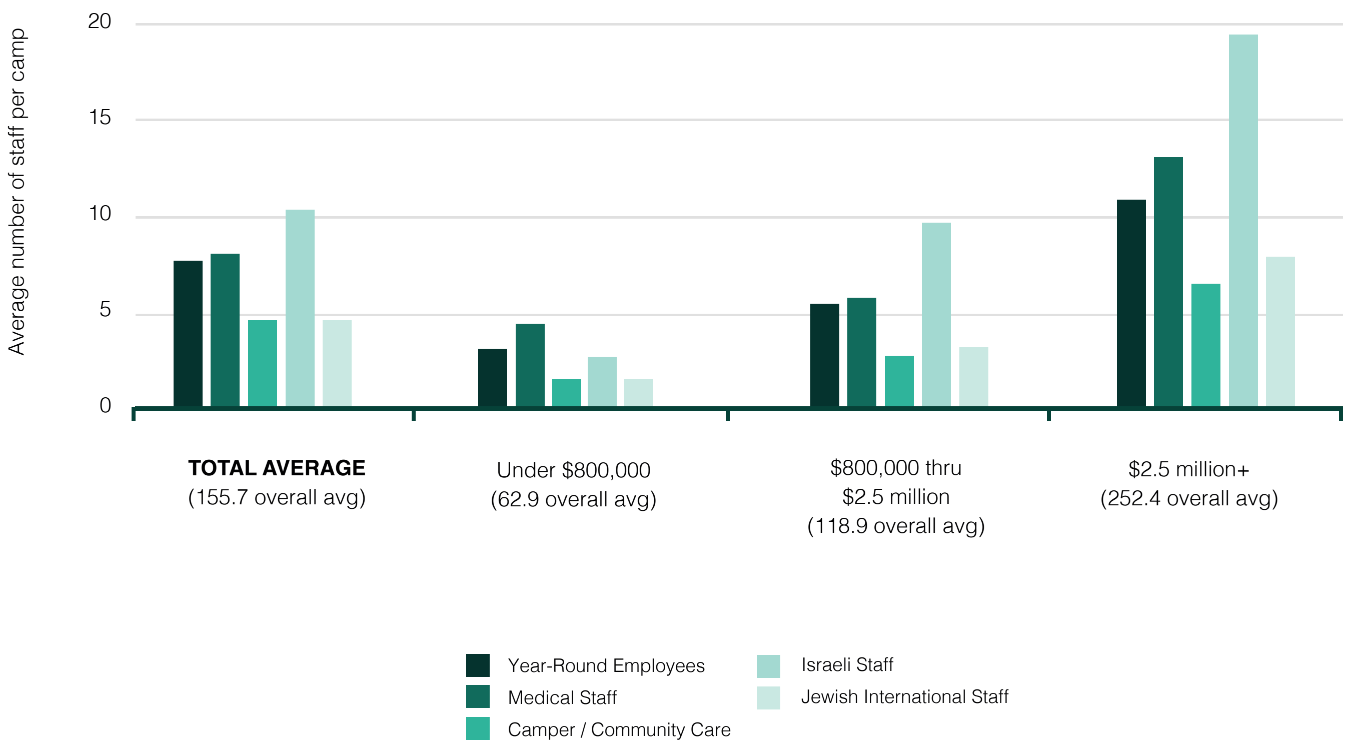
	Number of Camps	Camper-to-Staff Ratio	Number of Staff
Orthodox	16	2.0	4,988
Ramah	10	2.4	2,556
URJ	18	3.5	2,868
Zionist	8	2.9	474
JCCA	26	5.4	3,926
Chabad	11	3.0	782
Young Judaea	10	3.5	1,103
AIJC	19	3.1	2,959
Other	41	2.5	5,095
TOTAL	**159**	**3.1**	**24,751**

On average, camps employ about seven full-time professionals, an average of 5% of camp summer staff are medical professionals, and 2.5% are designated as camper care staff. About 2.9% of camp staff are Jewish international staff (not including Israeli staff).

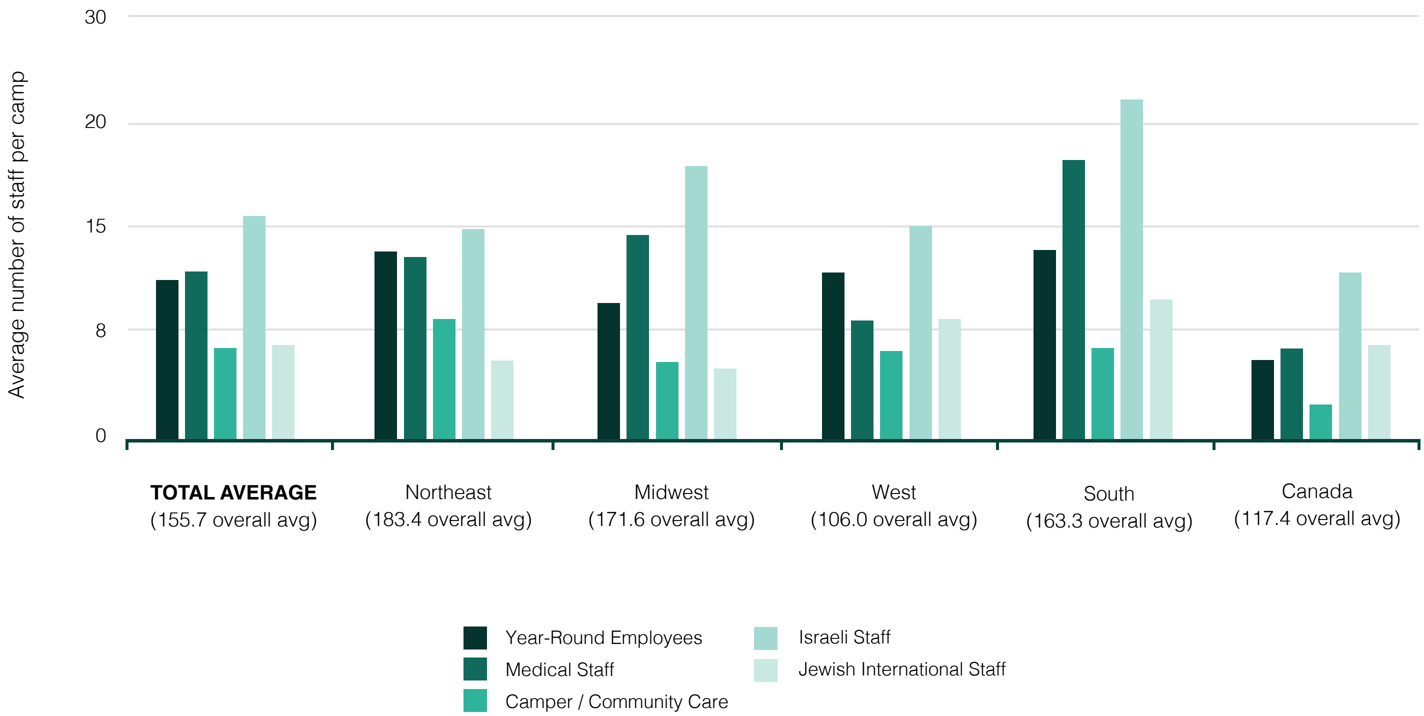
Average Number of Staff per Camp by Size



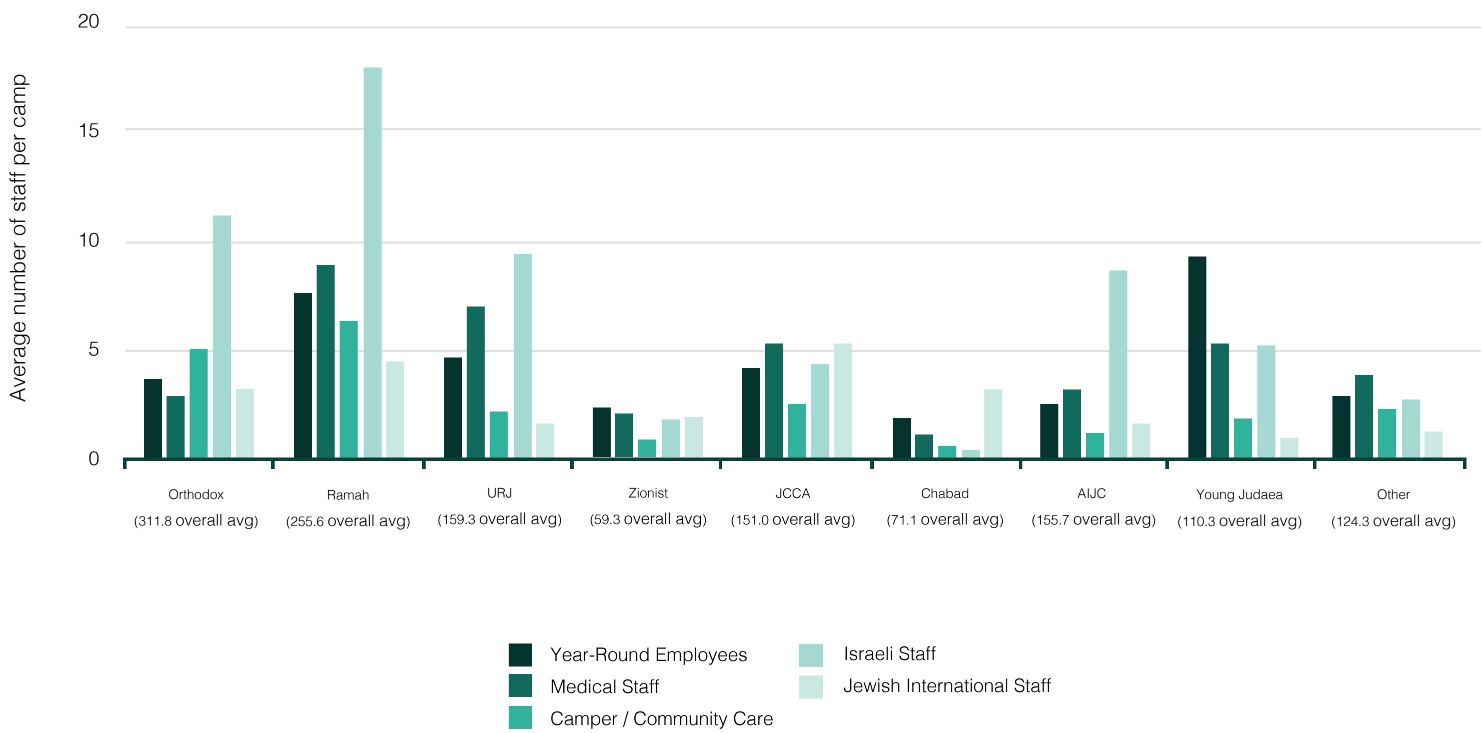
Average Number of Staff per Camp by Total Revenue



Average Number of Staff per Camp by Region



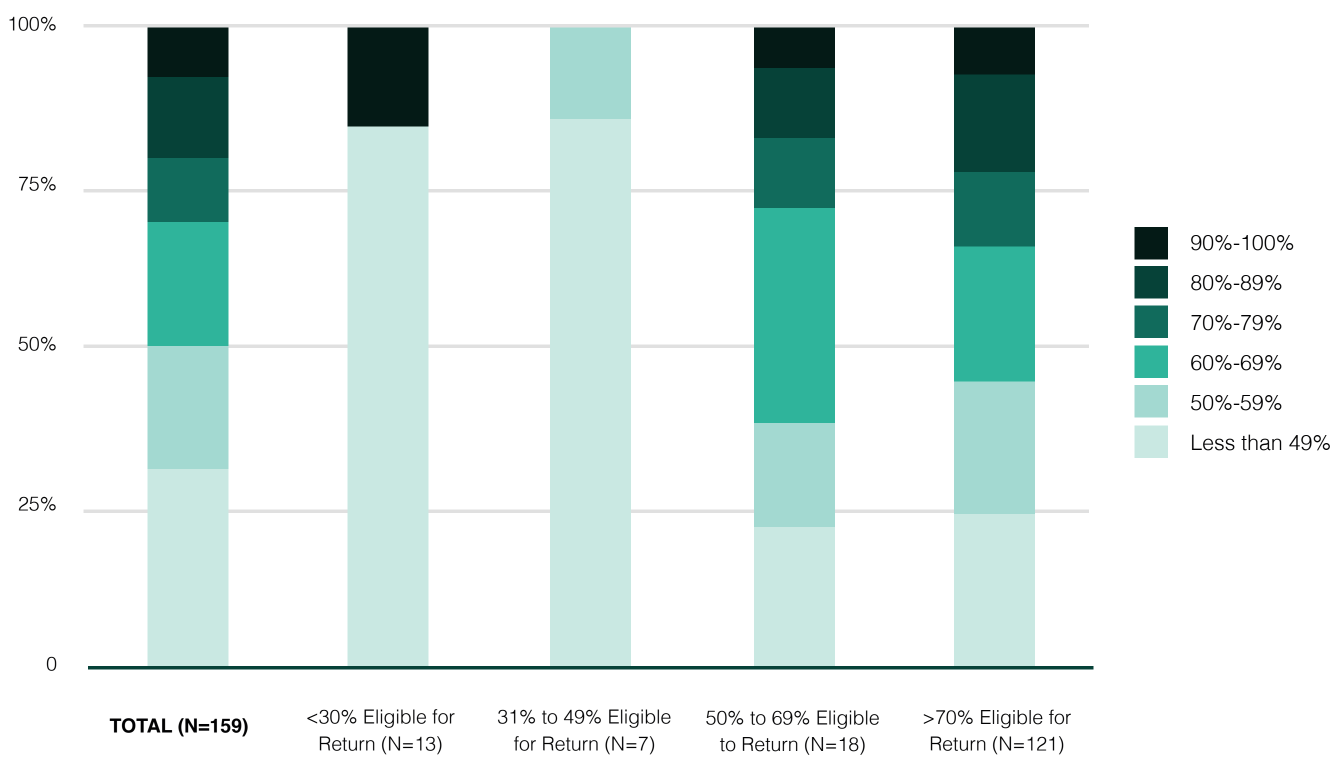
Average Number of Staff per Camp by Movement



Retaining college-age counselors. For the first time on the Census, and in the interest of more fully understanding the counselor experience, FJC asked about the percentage of 2017 college-age counselors and/or specialists (herein referred to as "college-age counselors") who returned to staff in 2018 (of those who were eligible to return).

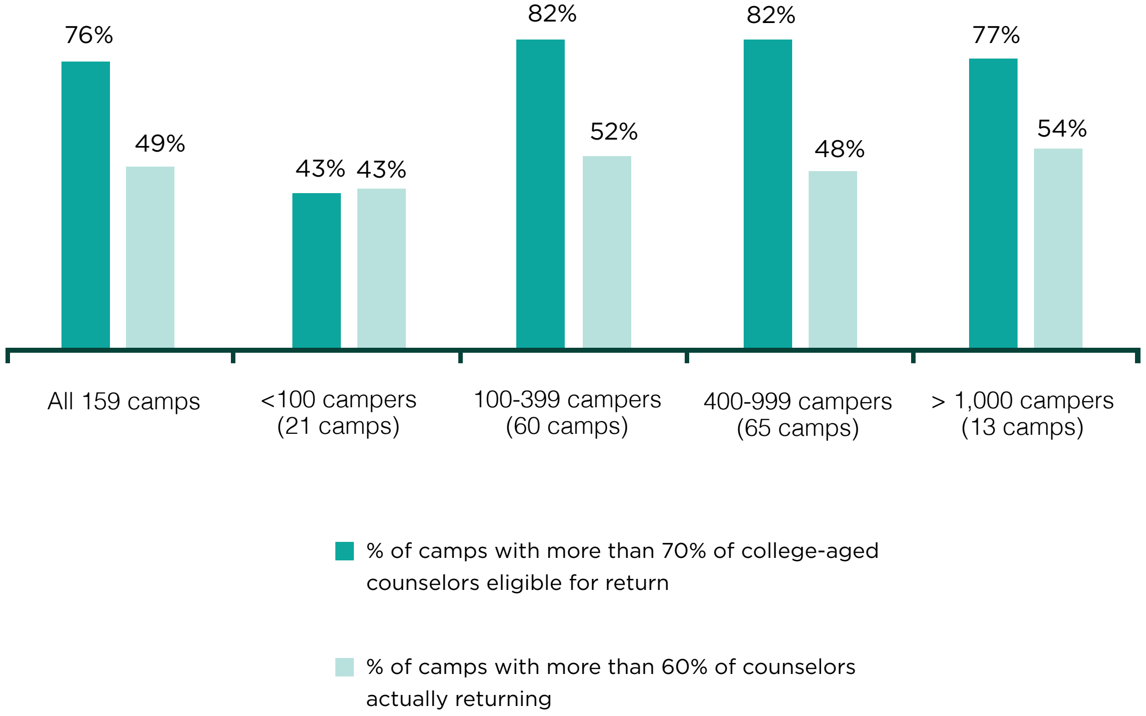
Overall, three-quarters of camps reported that more than 70% of their college-age counselors were eligible to return to staff.

Percent of College-Age Counselors who Returned by Proportion who were Eligible to Return



In general, smaller camps reported that a lower percentage of 2017 college-age counselors were eligible to return in 2018. Of the 21 camps with fewer than 100 campers, only 43% of camps reported that more than 70% of their college-age counselors were eligible to return in 2018, and only 43% of these camps reported that more than 60% of college-age counselors that were eligible to return in 2018 actually returned.

Returning College-Age Counselors by Size



Returning College-Age Counselors by Movement

Camping-Movement	Number of Camps	>70% of College-Age Counselors Eligible for Return	> 60% of Eligible Counselors Actually Returned in 2018
Orthodox	16	69%	38%
Ramah	10	80%	70%
URJ	18	89%	33%
Zionist	8	100%	75%
JCCA	26	77%	54%
Chabad	11	36%	9%
Young Judaea	10	90%	70%
AIJC	19	95%	42%
Other	41	66%	56%
TOTAL AVERAGE	**159**	**76%**	**49%**

CIT/LIT/SIT/MITs. In 2018, 3,696 CIT/LIT/SIT/MIT (herein referred to as “CIT program”) participants worked at 107 of the 159 summer camps. Almost half of those participants were at camps in the Northeast, where 43 different camps offer a CIT program. The majority of camps offer no stipends for CITs, with five camps offering stipends for some participants and 13 camps offering stipends for all participants.

CIT/LIT/SIT/MIT Participants by Region

	Number Camps with a Program	Average Number Participants per Camp	Stipend for all Participants	Stipend for some Participants	No Stipends Offered	Total Participants
Northeast	43	39.3	7	1	35	1,691
Midwest	16	26.5	3	1	12	424
West	21	18.9	2	3	16	396
South	9	41.0	1	0	8	369
Canada	18	45.3	0	0	18	816
TOTAL	**107**	**34.5**	**13**	**5**	**89**	**3,696**

Across the 107 camps that offer a CIT program, there is an average of 13.2 campers for each CIT in the program. As expected, ranges vary by camp size.

CIT/LIT/SIT/MIT Participants by Size

	Number Camps with a CIT Program	Camper Per CIT (Ratio)
Under 100	10	8.8
100-399	41	9.9
400-999	49	14.9
1000+	7	13.7
TOTAL AVERAGE	**107**	**13.2**

Many camp alumni working on staff, and many summer staff identified as Jewish.
About two-thirds of the reporting camps track the proportion of their summer staff who are alumni of their camp. Overall, about half of camps reported that fewer than 60% of their summer staff are alumni of their camp, a quarter of camps reported that between 60% and 79% of their summer staff are alumni of their camp and about a quarter of camps reported that 80% or more of their summer staff are alumni of their camp. Most notably, 9 of the 10 responding Young Judaea camps track alumni who return as staff, and 5 of these 9 reported that at least 90% of Young Judaea staff were camp alumni.

Percent of Summer Staff that are Alumni of that Camp by Movement

	% of Camps that Track	< 60% of Staff are Alumni	60%-79% of Staff are Alumni	80%-89% of Staff are Alumni	90%-100% of Staff are Alumni
Orthodox	63%	60%	30%	10%	0%
Ramah	70%	71%	0%	14%	14%
URJ	78%	57%	21%	14%	7%
Zionist	88%	14%	14%	14%	57%
JCCA	62%	50%	25%	13%	13%
Chabad	45%	100%	0%	0%	0%
Young Judaea	90%	22%	11%	11%	56%
AIJC	74%	43%	43%	7%	7%
Other	63%	42%	31%	15%	12%
TOTAL AVERAGE	**68%**	**48%**	**24%**	**12%**	**16%**

With staff data (as with camper data), the 2018 Census only asked about religious identity of summer staff when a camp shared that they are specifically tracking that information. Only 40% of the responding camps shared that they track the religious identities of summer staff. Of those camps that do track the religious identity of their summer staff, three quarters reported that more than 90% of their summer staff identify as Jewish.

Among the camps that track religious identity of summer staff, the Orthodox, Chabad, Zionist, and Young Judaea camps have the highest proportions of summer staff identified as Jewish.

Percent of Summer Staff that Identify as Jewish by Movement

	% of Camps that Track	< 60% are Jewish	60%-79% are Jewish	80%-89% of Staff are Jewish	90%-100% of Staff are Jewish
Orthodox	31%	0%	0%	0%	100%
Ramah	80%	0%	13%	13%	75%
URJ	56%	0%	20%	40%	40%
Zionist	13%	0%	0%	0%	100%
JCCA	19%	0%	40%	40%	20%
Chabad	73%	0%	0%	0%	100%
Young Judaea	50%	0%	0%	0%	100%
AIJC	26%	20%	0%	40%	40%
Other	37%	0%	0%	7%	93%
TOTAL AVERAGE	**39%**	**2%**	**8%**	**16%**	**74%**

Percent of Summer Staff that Identify as Jewish by Size

	% of Camps that Track	< 60% are Jewish	60%-79% are Jewish	80%-89% of Staff are Jewish	90%-100% of Staff are Jewish
Under 100	52%	0%	0%	0%	100%
100-399	33%	5%	10%	15%	70%
400-999	45%	0%	10%	21%	69%
1000+	15%	0%	0%	50%	50%
TOTAL AVERAGE	**39%**	**2%**	**8%**	**16%**	**74%**

Counselor salaries widely varied: The average lowest weekly salary across all camps was $180. The average highest weekly salary was $570.

Counselor salaries varied by region. The average low salary was $100 higher in the West than in other areas of North America. The average high salary in the South was half of the average high salary in other parts of the United States.

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Counselor Salaries by Region (USD)

	Average Lowest Weekly Salary	Average Highest Weekly Salary
Northeast	170	570
Midwest	160	700
West	260	610
South	170	310
Canada	100	490
TOTAL AVERAGE	**180**	**570**

Counselor Salaries by Size (USD)

	Average Lowest Weekly Salary	Average Highest Weekly Salary
Under 100	250	620
100-399	180	580
400-999	150	570
1000+	160	380
TOTAL AVERAGE	**180**	**570**

CAMP REVENUE AND TUITION

Revenue components behave as expected: The tables below represent the average revenue dollars (USD) submitted by respondents. As expected, average amounts for various components of camp revenue are tied to the number of campers.

Camp Revenue (in U.S. Dollars)

Size of Camp	Average Federation Annual Support	Average Annual Fund	Average Scholarship Fund	Average One Happy Camper Revenue	Average Tuition for Current Camp Year	Average Off-Season/ Special Programming/ Event	Average Rental Income	Average Miscellaneous	Average Tuition Revenue (Gross Revenue)
Under 100	38,200	15,500	26,800	5,800	123,600	208,00	237,200	222,800	343,600
100-399	44,000	110,900	90,500	17,200	795,600	66,600	204,300	41,900	1,158,600
400-999	122,800	221,500	141,400	35,100	2,391,500	154,600	350,200	93,100	2,930,300
1000+	486,300	210,500	332,300	45,200	5,004,100	347,500	301,900	220,200	6,335,300
TOTAL AVERAGE	**111,200**	**168,300**	**119,300**	**24,400**	**1,644,600**	**152,300**	**285,900**	**99,200**	**2,139,000**

Total Revenue	Average Federation Annual Support	Average Annual Fund	Average Scholarship Fund	Average One Happy Camper Revenue	Average Tuition for Current Camp Year	Average Off-Season/ Special Programming/ Event	Average Rental Income	Average Miscellaneous	Average Tuition Revenue (Gross Revenue)
Under $800,000	33,800	36,400	39,800	9,300	258,400	91,700	23,200	45,400	406,900
$800,000 thru $2.5 million	50,500	151,500	77,000	24,000	1,193,500	52,800	140,200	99,900	1,566,500
$2.5 million+	272,000	240,100	227,100	41,600	3,303,300	223,300	498,100	132,800	4,301,100
TOTAL AVERAGE	**111,200**	**168,300**	**119,300**	**24,400**	**1,644,600**	**152,300**	**285,900**	**99,200**	**2,139,000**

Tuition + fundraising: How is camp revenue created? Tuition remained the largest component of revenue (an average of 76%).

Tuition is a larger than average proportion of revenue at camps in the Northeast and in Canada. Yet, tuition is a very low percentage of revenue at camps in the West. FJC hypothesizes that this difference can be attributed to camping is a relatively newer phenomenon in the West with more new camps. These 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 Reporting	Average Total Camp Revenue	Average Total Tuition	Tuition as % of Revenue
Northeast	61	2,193,800	1,785,800	81%
Midwest	20	2,564,400	1,852,900	72%
West	26	2,137,500	1,355,400	63%
South	12	2,998,100	2,323,000	77%
Canada	19	1,155,500	929,300	80%
TOTAL	**138**	**2,163,900**	**1,643,200**	**76**%

TUITION AND FINANCIAL AID

Weekly tuition – small variations with the Orthodox at the low end: The average maximum weekly tuition is about $1,300 (USD), where each of the 150 responding camps individually counts as an individual unit, or about the same figure of $1,300, weighted for the number of campers at each camp. The unweighted average maximum weekly tuition from the 2017 Census was somewhat lower (about $1,200), but 40 fewer (and potentially different) camps responded to this question last year (110 camps). The average core program maximum tuition fluctuates with the size of the camp --- in camps with fewer than 100 individual campers, the average is about $1,500 per week; in camps with more than 1,000 campers, it averages $1,200. Chabad reports the lowest average tuition ($800). Geographically, tuition costs are lowest in Canada.

Financial aid – More need in smaller camps: The Census asked respondents to report on the number of campers who requested financial aid and the number who received it, excluding One Happy Camper® incentive grants. Throughout the network, 18,935 individuals or about 28% of total campers requested assistance. This is far fewer than the 24,000 individuals who requested aid in 2017. This year, about 96% of campers who requested aid received it, which is nearly the same as the 94% of campers requesting and receiving aid in both 2016 and 2017.

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

Tuition and Financial Aid by Size

	Summer 2018 Core Program Maximum Weekly Tuition (USD)	% of Campers Requesting Assistance	% of Requests who Received Assistance
Under 100	1,500	50%	90%
100-399	1,200	32%	94%
400-999	1,300	29%	98%
1000+	1,200	20%	96%
TOTAL AVERAGE	**1,300**	**28%**	**96%**

Tuition and Financial Aid by Total Revenue

	Summer 2018 Core Program Maximum Weekly Tuition ($)	% of Campers Requesting Assistance	% of Requests who Received Assistance
Under $800,000	1,200	41%	89%
$800,000 thru $2.5 million	1,200	29%	97%
$2.5 million+	1,300	25%	97%
TOTAL AVERAGE	**1,300**	**28%**	**96%**

Of all the movement camps, need levels are highest for Chabad. In these camps, 80% of campers requested aid, and 90% of those that did request aid received it. In contrast, Young Judaea is at the low end of the spectrum where 18% of campers requested aid. Additionally, it is interesting to note that some Ramah camps distributed aid to more campers than those who requested it; therefore, their percentage is over 100% and the highest of the movements.

Tuition and Financial Aid by Movement

	Summer 2018 Core Program Maximum Weekly Tuition (USD)	% of Campers Requesting Assistance	% of Requests who Received Assistance
Orthodox	900	27%	96%
Ramah	1,400	29%	117%
URJ	1,500	34%	99%
Zionist	1,100	28%	93%
JCCA	1,600	22%	84%
Chabad	600	80%	90%
Young Judaea	1,200	18%	92%
AIJC	1,200	27%	98%
Other	1,200	27%	96%
TOTAL AVERAGE	**1,300**	**28%**	**96%**

Geographically, need levels are highest in the West (as noted in the preceding section as well), where 33% of campers requested aid in 2018. Campers who requested aid were least likely to receive it in camps in the South, where only 84% of campers who requested aid received it (12% less than the national average).

Tuition and Financial Aid by Region

	Average Summer 2018 Core Program Maximum Weekly Tuition (USD)	Average Total Camp Revenue	Average Total Tuition
Northeast	1,400	26%	99%
Midwest	1,200	26%	95%
West	1,400	33%	98%
South	1,400	29%	84%
Canada	800	29%	96%
TOTAL	**1,300**	**28%**	**96%**

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.

Census Team
Amy Bravman, Program Assistant
Libbie Brooks, FJC Data Intern
Staci Myer-Klein, Program Manager
Marci Soifer, Director of Operations

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.

FOUNDATION FOR JEWISHCAMP

Jewish Summers. Jewish Future.