ROSOV CONSULTING | Information Insight Impact

The Untapped Market for Jewish Overnight Camp

Understanding Why Families Choose Not to Send Their Children to Camp

October 2026







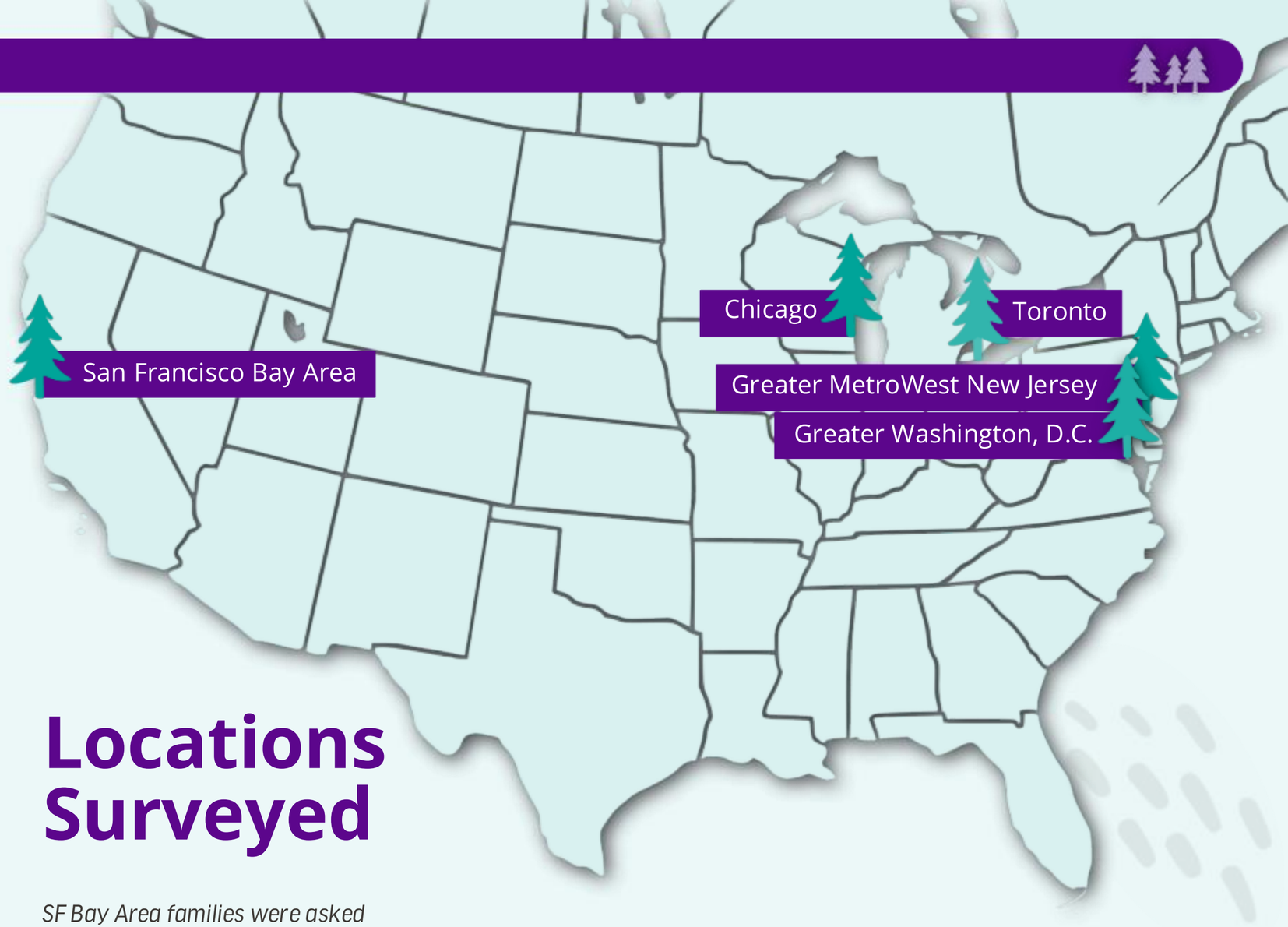
Study Commissioned by:

מחנות רמה Ramah Camping Movement

FOUNDATION FOR JEWISH CAMP

The study was designed to:

- Understand the **factors that parents weigh** when choosing a summer camp
- **Gauge their interest** in sending their children to Jewish overnight camp in the future
- Understand the **perceived barriers** that will prevent them from future enrollment.



Locations Surveyed

SF Bay Area families were asked about Summer 2025 and were not asked all the questions

Survey Methods and Sample



694 families whose children **did not attend** Jewish overnight camp in previous summer

Families were reached through participating local Jewish organizations and community partners

Emerging Families

all children age 8 or younger (n=358)

Age-Eligible Families

at least one child age 9+ (n=336)

93 families had previously attended Jewish overnight camp but not in the reference summer

Interview Methods

Survey respondents were given the opportunity to opt in to participate in a semi-structured interview



73 **Parents from across the five markets***

Analyzed by the Rosov Consulting team for recurring themes, with CoLoop used as an AI-assisted platform to support transcript organization and excerpt retrieval.

***A subset of the interviewees were asked specific questions about Camp Ramah**

We sought to understand

Perspectives + **Attitudes**

Top 5 Research Findings

1. **Affordability is the most significant enrollment barrier for age-eligible families.**
Among age-eligible families, 49% cite cost as a barrier, and among all families, only 14% consider Jewish overnight camp affordable. Cost concerns extend across income levels.

2. **Uncertainty about financial aid compounds affordability challenges.**
63% report that assuming they would not qualify discouraged them from applying for aid, while 30% were unaware of available financial assistance options.

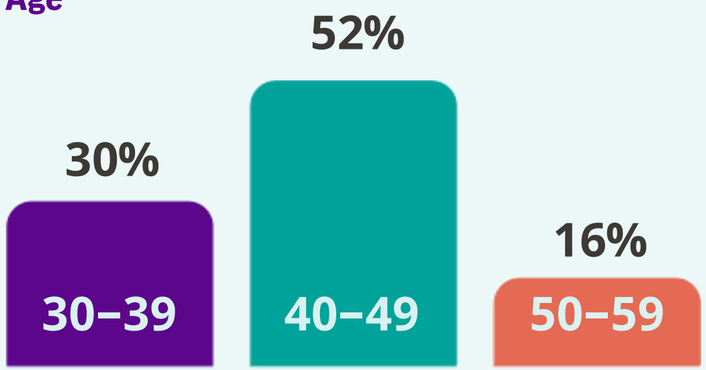
3. **Trusted relationships and online research drive camp consideration, but direct engagement remains limited.**
Families who had previously explored overnight camp rely heavily on personal recommendations (67%) and online research (62%), yet relatively few attend recruitment events (21%) or begin registration (23%).

4. **Families seek care, safety, belonging, and fit, viewing Jewish overnight camp as a place where their child can thrive.**
All parents place highest importance on nurturing environments (90%), safety (83%), and belonging (80%). While most view camps positively, 16% of age-eligible families express concerns about whether their child will fit in.

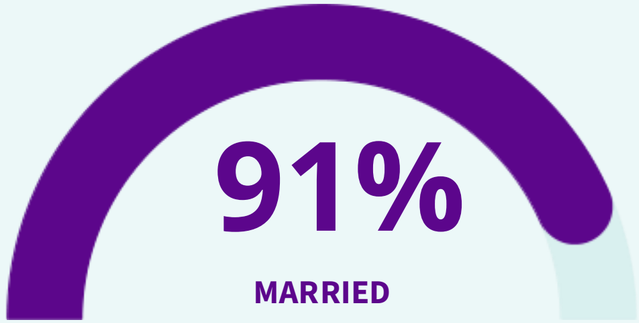
5. **Children's readiness and interest are major barriers that evolve with age.**
For families with younger children, readiness is the dominant barrier (93%). Among age-eligible families, lack of child interest becomes an obstacle (34%).

Respondent and Family Profile

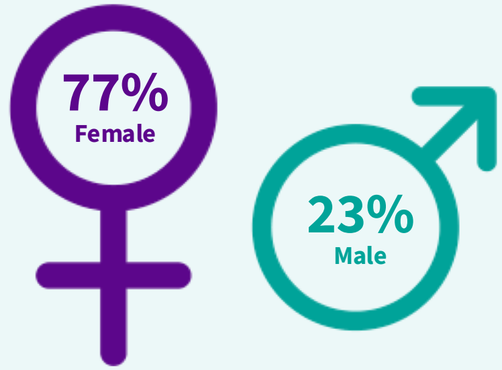
Age



Marital Status



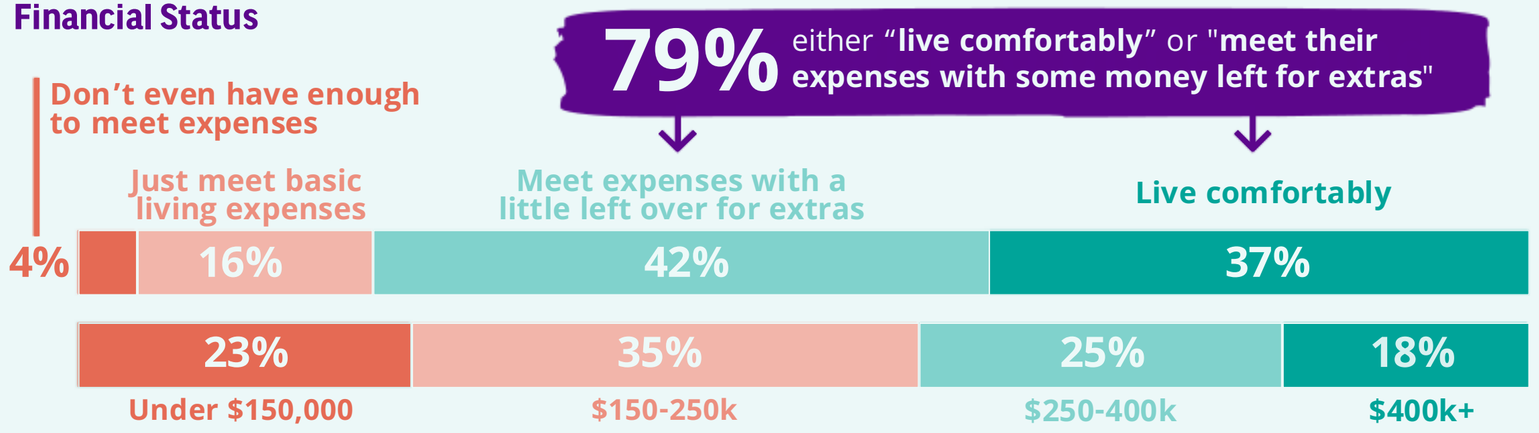
Gender



Number of Children

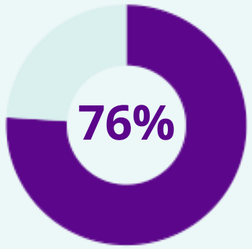


Financial Status

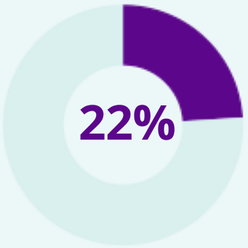


Jewish Identity and Household Composition

Household Composition



say everyone in their immediate family is Jewish



say some family members are Jewish and some are not

Jewish Engagement

71% are members or regular participants in a Jewish congregation

55% participate in Jewish/Israeli events or activities at least monthly

28% participate in Jewish/Israeli events once every few months

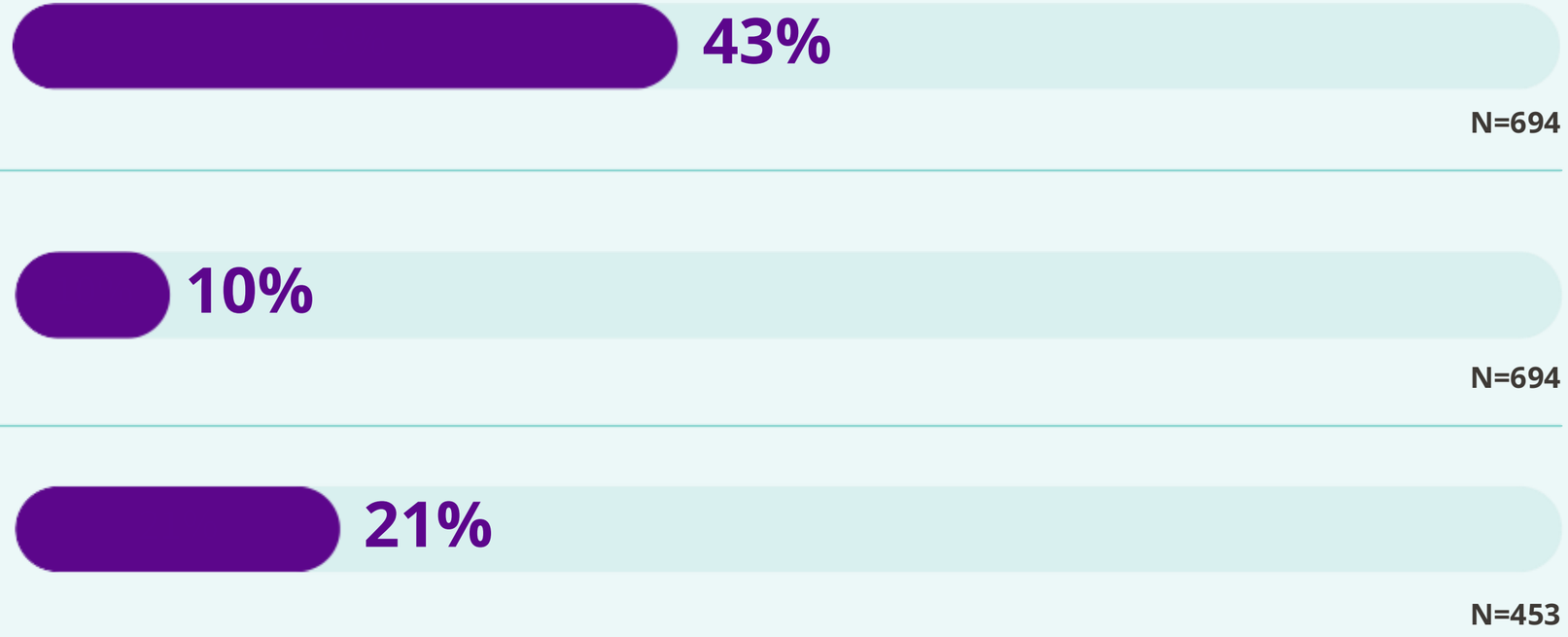
Denomination or Movement

Respondents could select more than one

Conservative	42%
Reform	36%
Secular/culturally Jewish	21%
Just Jewish/no particular denomination	17%
Orthodox	11%

Family Attendance at Different Types of Camps

Families Attend Different Types of Camp







Awareness & Interest in Jewish Overnight Camp

Future interest is concentrated in emerging families

Interest in sending their children to camp in a future summer

All Families

Very interested	Somewhat interested	A little interested	Not at all interested
39%	22%	20%	18%

Emerging Families (All children 8 and under)

Very interested	Somewhat interested	A little interested	Not at all interested
51%	19%	18%	12%

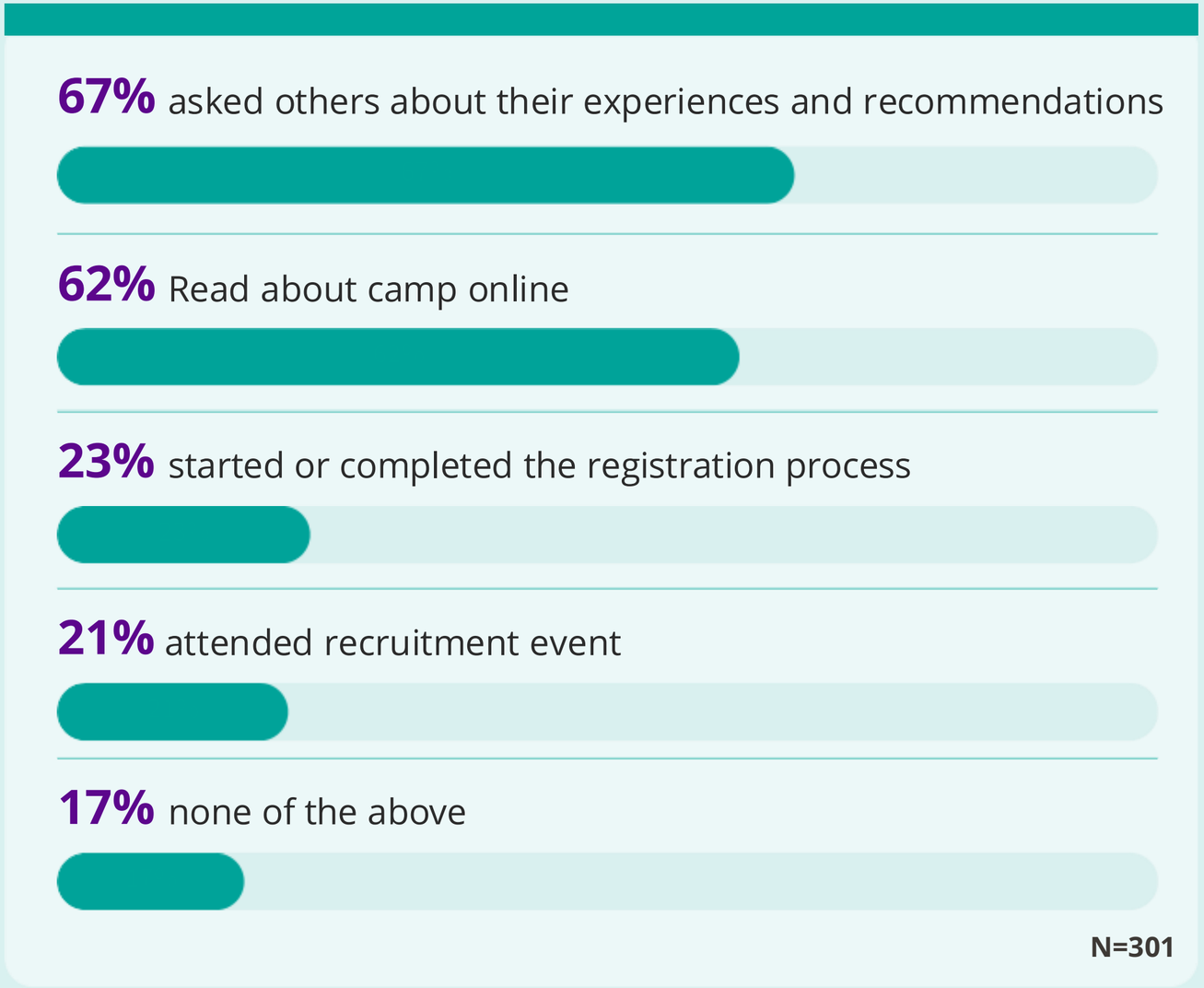
Age-Eligible Families (At least one child 9 and over)

Very interested	Somewhat interested	A little interested	Not at all interested
26%	25%	23%	26%

N=688

Families rely on recommendations & online research

Families who had previously considered overnight camp **reported little direct contact** with camps.







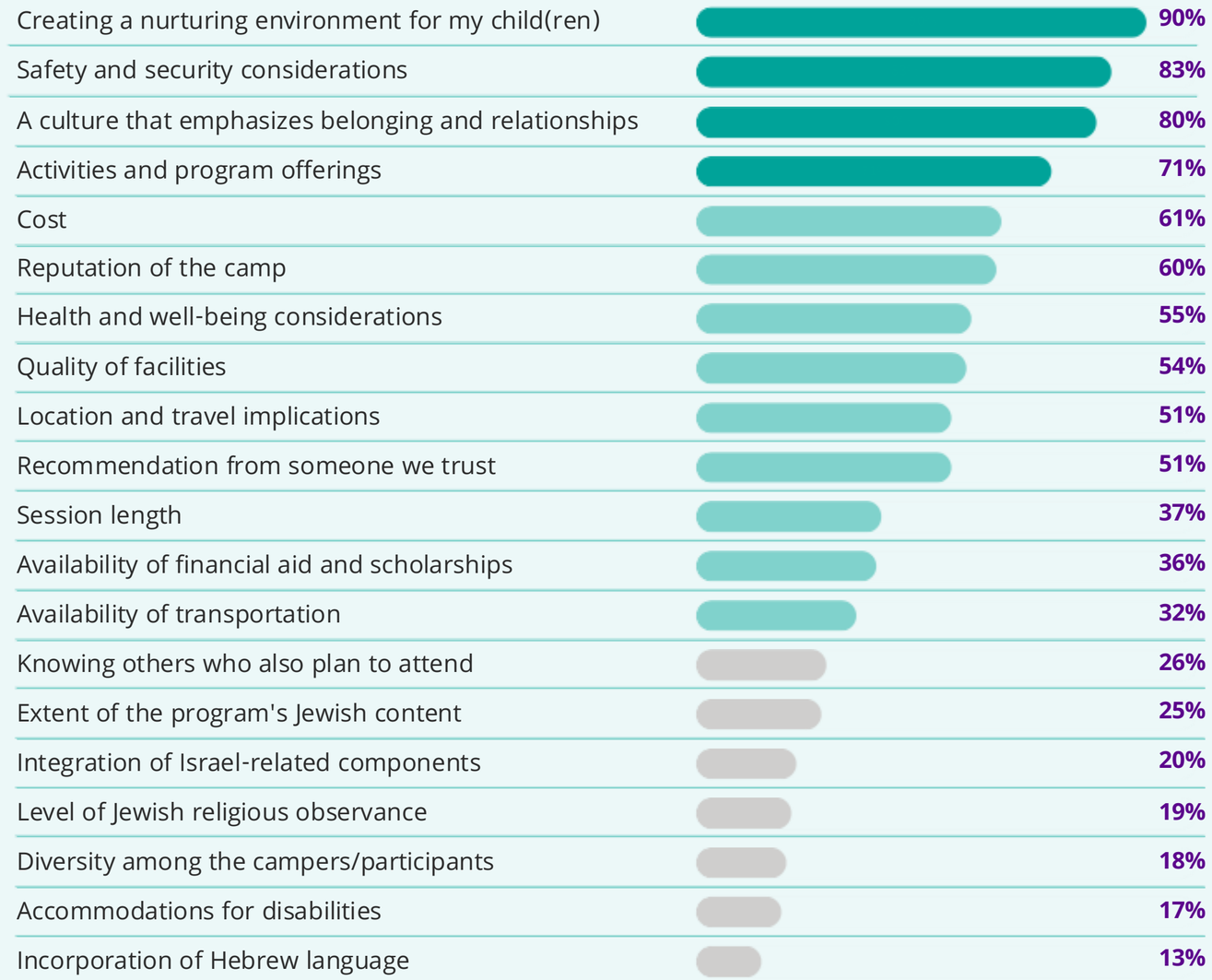
What Are Parents Looking for at Jewish Overnight Camp?

Parents prioritize a nurturing, safe environment, belonging, relationships, and program offerings.

When considering/If you were to consider a particular summer program/camp for your child(ren), how important is each of the following factors in your decision-making process?*

For each of the following factors, parents were asked if it was "Very Important", "Somewhat Important," and "A little important." We report the percentage of parents who said this factor was "Very Important."

*Parents can select multiple options

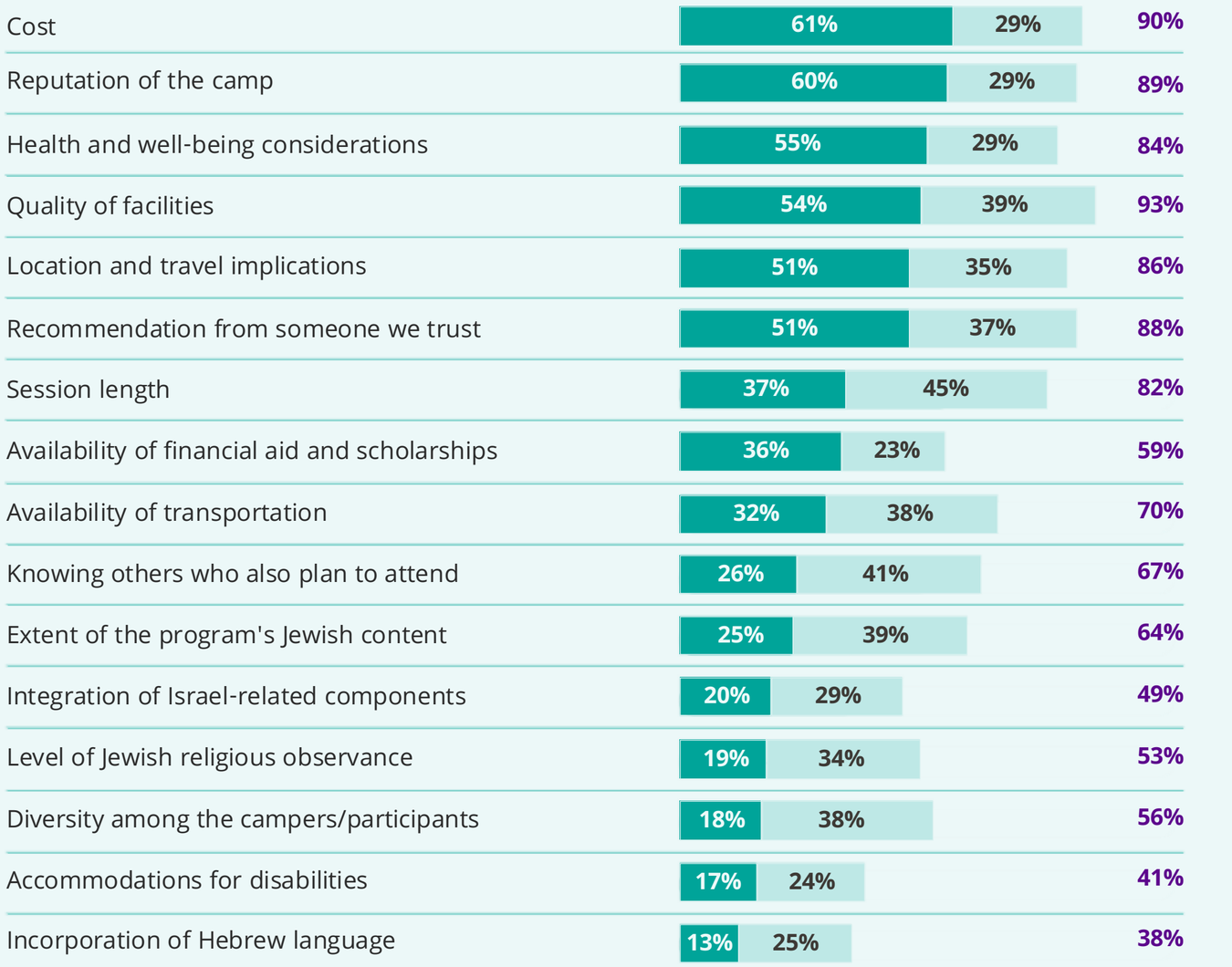


Cost, a camp's reputation, health and well-being considerations, and the quality of the facilities are also important factors

When considering/If you were to consider a particular summer program/camp for your child(ren), how important is each of the following factors in your decision-making process?*

For each of the following factors, parents were asked if it was "Very Important", "Somewhat Important," and "A little important."

*Parents can select multiple options



Interviewed parents identified skilled staff as a way to build a welcoming camp

"Camps should show 'meet our camper team' on their websites and then you can see the faces and the credentials of these people who are there. I think that would be a huge selling feature for a lot of families. You're giving away your babies, right? You want to know that they're in hands of capable, qualified people."

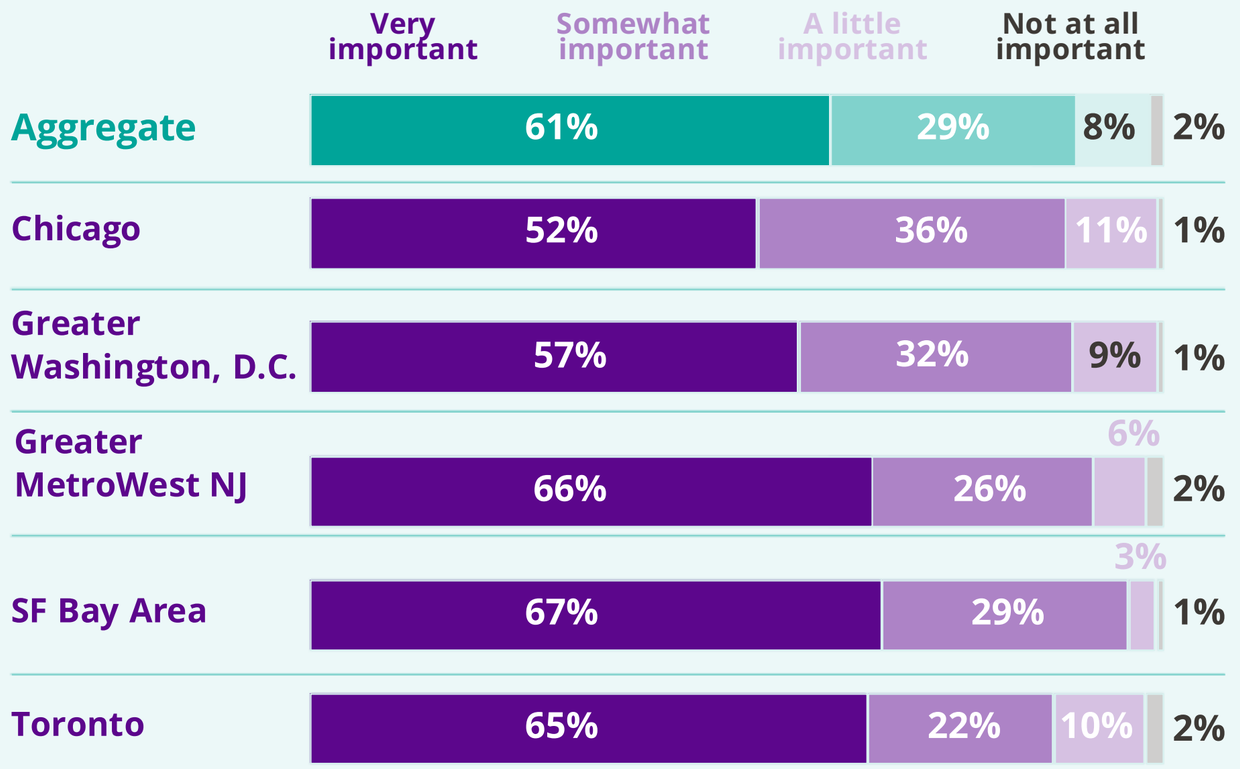
– Toronto Parent

"I would want counselors who are trained to understand kids and their social dynamics, including how to defuse situations that are getting out of hand. I'd want them to be accepting of children who don't fit a standard mold. One of my kids isn't super athletic or outgoing and needs someone more nurturing and sensitive."

– Greater MetroWest NJ Parent

Cost matters, especially to families with camp-eligible children

Importance of cost in deciding to send their child(ren) to camp



N=532

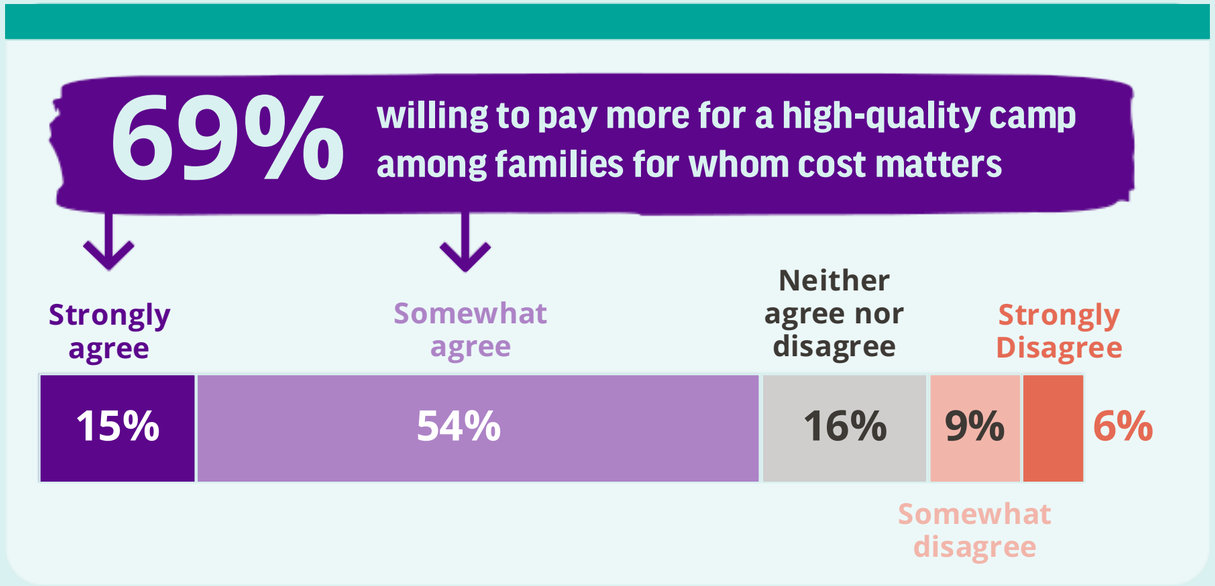
"We are good financially, but we are not that good. And so thinking about that for every summer, it would have to be a really good experience and one that we felt confident that our kids are at least even interested in doing."

– Greater MetroWest NJ Parent (emerging)

"$1,000 a week is ... a lot of money, especially when you have multiple kids. One kid is $5,000, and then your other kids want to go. So all of a sudden, $5,000 becomes $20,000 for 4 weeks. It feels unreasonable. "

– Chicago Parent

In addition to cost, quality also matters

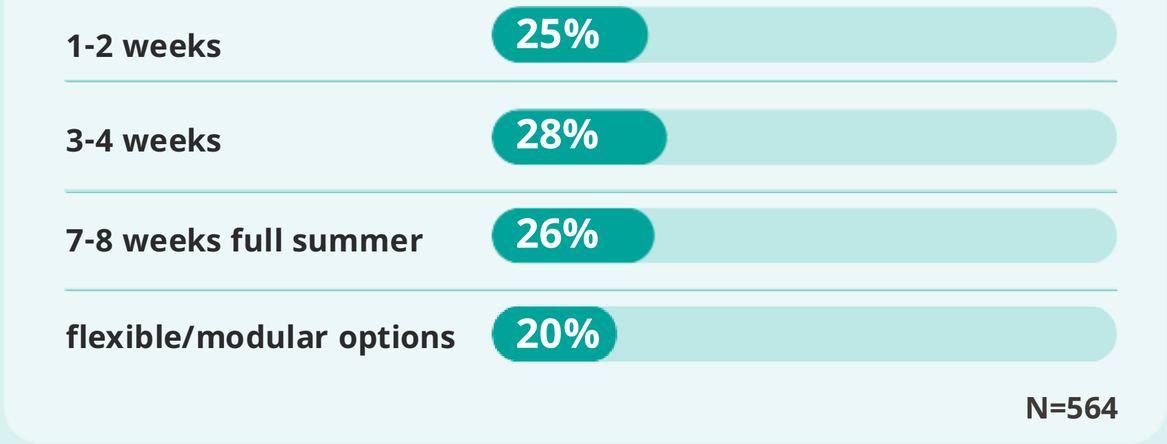


"We're constrained by money. But, you know, that's not the number one factor for us. I'll pay a little more ... to have better programming."

– Greater Washington, D.C. Parent

Overall session preferences are split

Overall session preferences are split



N=564



say a **reduced-cost 1-2 week session** would make them **more likely to send** their children to Jewish overnight camp

N=587

Preferred session length varies across markets

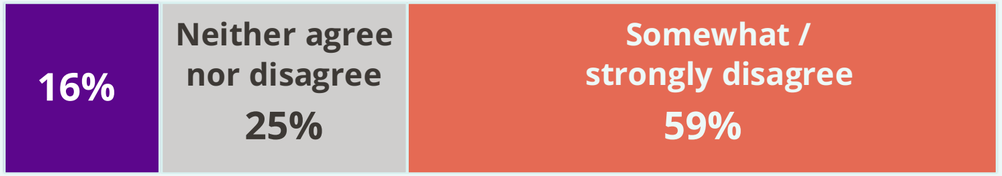
	Short sessions (1-2 weeks)	Medium sessions (3-4 weeks)	Full-summer sessions (7-8 weeks)	Flexible or modular options
Chicago	20%	31%	35%	14%
Greater Washington, D.C.	32%	31%	13%	24%
Greater MetroWest NJ	5%	24%	50%	22%
San Francisco Bay Area	49%	25%	5%	21%
Toronto	30%	29%	19%	22%

N=564

Parents have clear preferences for types of Jewish experiences at camp

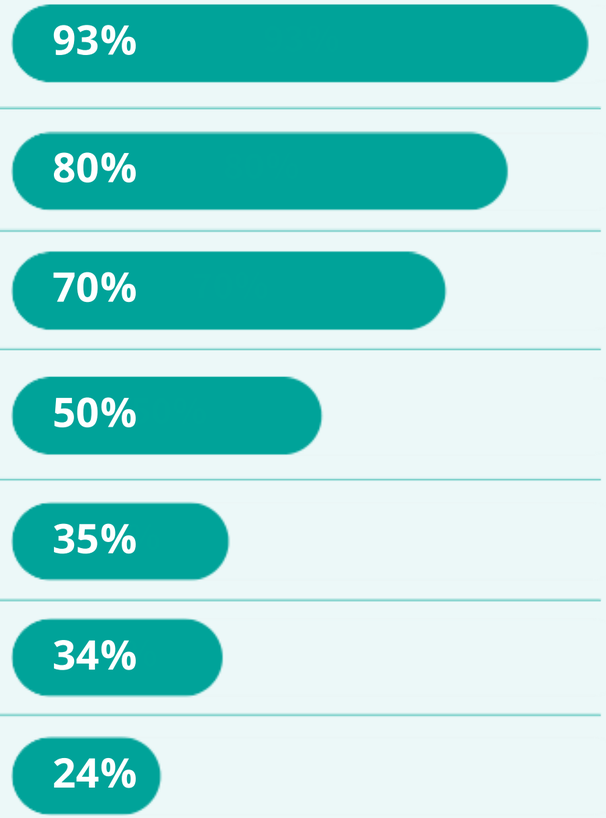
Jewish overnight camps are too religious for their family

Somewhat / strongly agree



N=561

% of families who want to see these Jewish elements at their children's camp

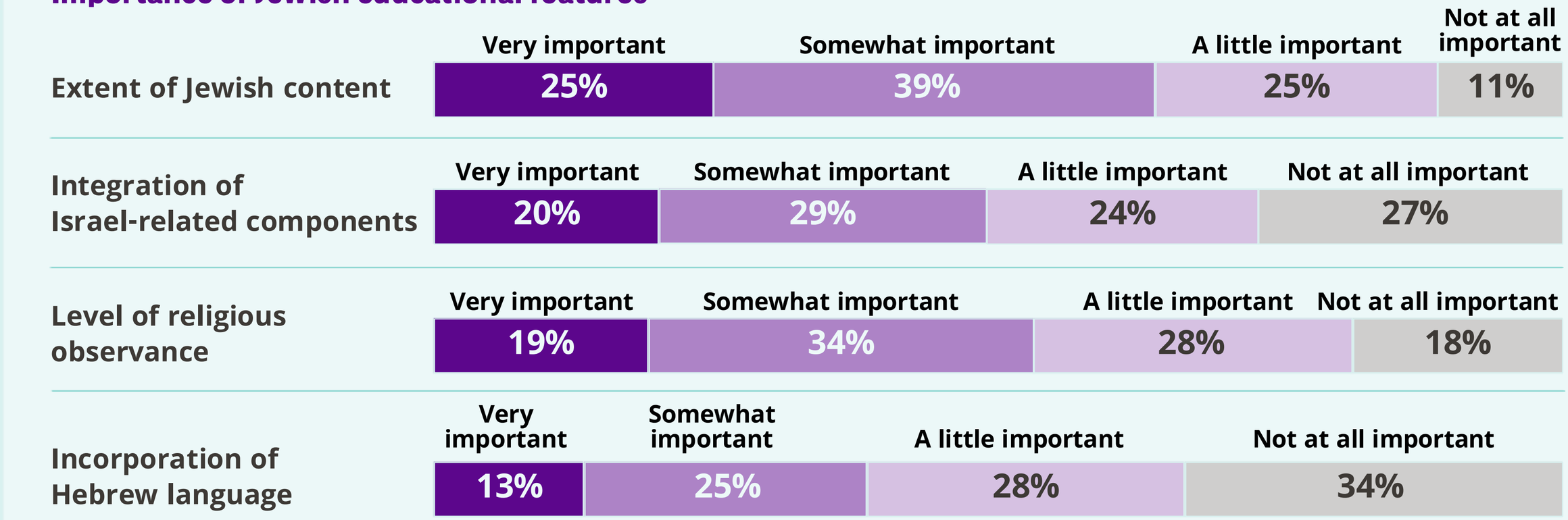


*Age-Eligible Families 57%; Emerging Families 43%

N=470

Importance of Jewish Educational Features and Curricula Varies

Importance of Jewish educational features



Most parents favor an Israel-centered camp experience

Of parents who rated the integration of Israel education components as either somewhat or very important, **most favor an Israel-centered camp experience.**

85% Prefer an approach that **celebrates Israel** and places it at the center of many camp activities

15% Prefer a **neutral approach** towards Israel (e.g., not "pro" and not "anti")

N=333

"I would want to know that a spectrum of political views is tolerated or even encouraged... "

– Chicago Parent

"What I would love is like a summer camp that was very ... focused on Israel."

– Greater Washington, D.C. Parent





Barriers to Attending Jewish Overnight Camp

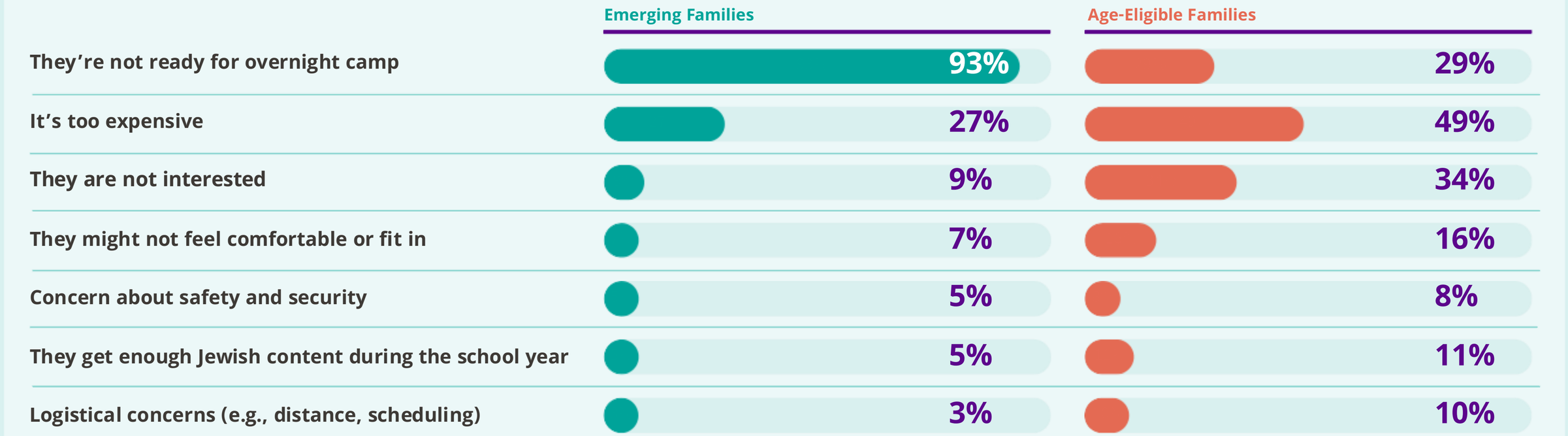
Families generally believe in the Jewish overnight-camp experience

Families do not agree that camps are **affordable.**



Decision factors also become barriers to enrollment

What are the primary reasons you (decided against/never considered) Jewish overnight camp for your children?



Less common barriers than those shown above were: concern that their identities would not be supported, loyalty to another camp, concerns about accommodations, an older child had a negative experience, camp didn't meet expectations, and social concerns.

Readiness is the dominant barrier for emerging families

Families who selected readiness among their top three barriers



"He has not wanted to ... be separated or go somewhere where he's far away. And so he's resisted it."

– Greater Washington, D.C. Parent

"He's just not ready for... sleep-away camp yet. He just doesn't feel comfortable being away from home by himself."

– Chicago Parent

Some parents are not yet ready for separation

"There's them being ready and there's me being ready, and those are not the same thing."

– Greater Washington, D.C. Parent

Cost leads the barriers once children reach camp age

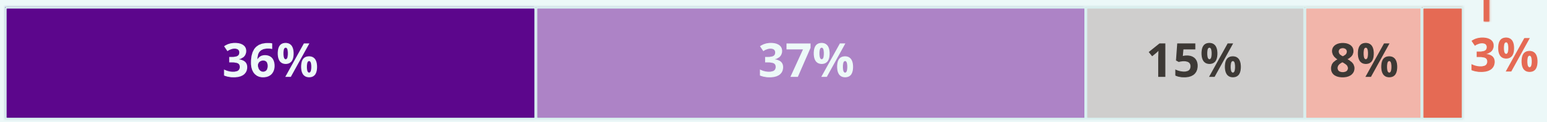
Families who selected **cost** as one of the **top 3 barriers**

27%
Emerging Families

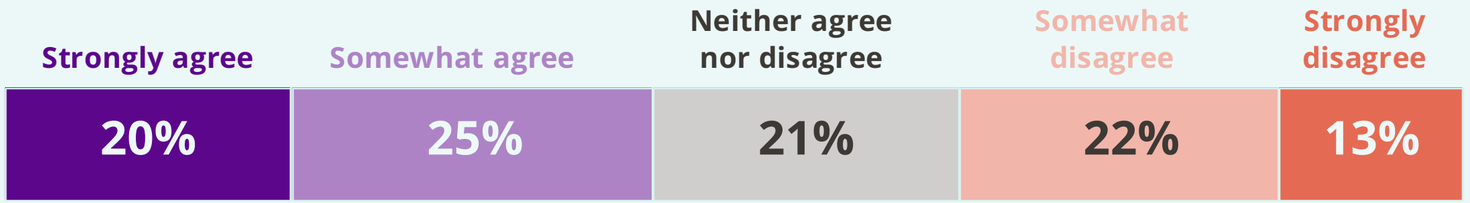
49%
Age-Eligible Families

Families who indicated **cost was important**

Consider Jewish overnight camp a luxury



Feel comfortable asking for financial aid and scholarships



Middle-income families can feel priced out and ineligible for aid

"We make too much money to get enough financial aid or any financial aid, but we can't afford the costs without significant aid."

– Greater Washington, D.C. Parent

"Maybe if it was just more obvious if I qualified for them or not, like enter a scholarship calculator."

– Toronto Parent

Burdensome or uncertain aid processes can deter eligible families

"I don't even want to go through the process and then find out that it was just for nothing. I don't have time for that. I'm too busy. I want something that is straightforward, yes, no."

– Toronto Parent

"The scholarship information should be easier to go through rather than having to email them and scanning stuff and things of that sort. You should be able to do things online."

– Chicago Parent

Parents want predictable support beyond the first year

"It feels a little unrealistic. I worry like we'll do it one year and we can't do it the next year, and kind of setting them up to be disappointed if we can't make it happen again."

– Greater MetroWest NJ Parent

"Because once you get, if your kid is hooked and then I see like they have that One Happy Camper grant that goes away after the first year. So like the cost is still there year after year, after year. So, what does it look like? How can we try to ensure that we can continue to give them that experience?"

– Greater MetroWest NJ Parent

Children's interest matters more as they reach camp age

Families who selected lack of interest among their top three barriers



"Camp is the most impactful thing that I can do to shape their lives. I would love for my older son to go to sleepaway camp. It is kind of breaking my heart in a million ways that he doesn't want to go, but I can't make that happen."

– San Francisco Bay Area Parent

"My daughter is turning 10. She has a couple of friends going to overnight camp this year, but she did not want to go, so we did not push it."

– Toronto Parent

Parents suggested that child-facing recruitment should emphasize concrete activities and camp life rather than abstract claims about growth or development.

For some families, fit depends on identity & care needs

"My daughter is biracial and her hair needs a lot of care. I told her: 'If you want to go to camp, we need to braid your hair'. And she didn't want to do that. There would be no way for her to care for her hair. I needed a no-care hairstyle where she could just get in the shower and wash it and not worry about it, and she wasn't willing to do that. So that was really a big roadblock."

– Toronto Parent

"I want my children to feel included. I don't want them to feel othered at a Jewish camp. My children are multiracial, but they're 100% Jewish, and I want them to be welcomed."

– Greater MetroWest NJ Parent

"What other rising 4th grade trans Jewish kids want to go to sleep-away camp? And can we get enough of them that would want to be in a gender-neutral space?"

–Greater Washington, D.C. Parent

Qualified, experienced staff & social-emotional support are especially important to parents of children with neurodivergent diagnoses

"If a camp had real expertise and experience supporting kids with ADHD and understood how to provide the kinds of support they might need, that would go a long way toward allaying some of our anxieties."

– Greater Washington, D.C. Parent

"My son also has level 1 autism and ADHD. So I would need to know that children with some of those diagnoses were properly cared for and that the staff knew how to manage. That being said, he's extremely independent. He doesn't need a shadow at camp. He needs medicine and he needs somebody to make sure that he's eaten or slept properly, so he's not going to go off the rails."

– Toronto Parent





What Can Camps and Communities Do?

Enrollment depends on solving four conversion challenges



Affordability



Financial-aid access



Child interest



Readiness

Attend to the high costs and **affordability concerns** for Jewish overnight camp

Cost is a genuine barrier to enrollment, including for families who otherwise see camp as a high-quality experience. Making camp accessible will require **attention to the overall economics** of participation as well as financial assistance.



Affordability

Make financial assistance **clearer** & more **predictable**

Families should be able to understand, before applying, roughly **what they will pay**, whether meaningful assistance is likely to be available, and whether they can expect support beyond the first year.



Financial-aid access

Recruit the **child** as well as the **parent**

Camp marketing and recruitment need **separate parent-facing and child-facing propositions.** Parent-facing recruitment should reinforce the qualities families prioritize—care, safety, belonging, activities, and value—while child-facing recruitment should emphasize concrete activities and what everyday camp life actually looks and feels like.



Child interest

Engage families early and show how camp **builds readiness**

Younger families represent a particularly receptive pool of prospective campers. Rather than simply waiting until children are “ready,” camps can build relationships with these families early and **demonstrate how a supportive camp environment helps children develop independence and confidence.** Showing parents how well-trained, experienced staff support children’s social-emotional needs and help them navigate camper social dynamics can make that developmental proposition more credible.



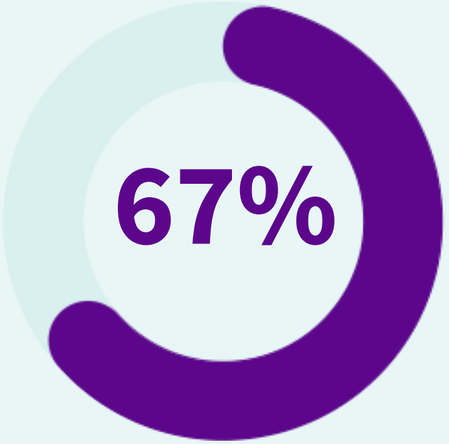
Readiness

Work through **people** families **already trust**

Peer relationships are already a central source of camp information. Camps can build on those relationships when communicating about affordability, readiness, the camper experience, and other enrollment decisions.

Possible tactics might eventually include:

- **family ambassadors**
- **parent-to-parent conversations**
- **local WhatsApp groups**
- **neighborhood hosts**
- **alumni referral efforts**
- **camp visits hosted by known families**



of families who had previously considered overnight camp **asked others** about their experiences and recommendations for camp

Top 5 Recommended Actions and Final Takeaways

1. **Expand affordability strategies to reach more families.**
   Develop targeted financial assistance for middle-income families, explore introductory pricing and shorter session options, and test multi-year support to make camp more financially accessible.

2. **Make financial aid simpler, more transparent, and easier to access.**
   Clearly communicate eligibility, likely out-of-pocket costs, and available assistance before families begin registration. Simplify application processes and reduce uncertainty about affordability.

3. **Strengthen recruitment through trusted community relationships.**
   Mobilize parent ambassadors, alumni, congregations, Jewish organizations, and community partners to generate referrals, build confidence, and create stronger pathways from interest to enrollment.

4. **Demonstrate quality, care, belonging, and Jewish value at camp.**
   Use stronger messaging to highlight staff quality, safety, inclusion, social-emotional support, meaningful Jewish experiences, and individualized camper care at camp.

5. **Engage families earlier and build children's readiness and enthusiasm for camp.**
   Develop diverse recruitment strategies, offer introductory camp experiences and visits, and create child-centered content showcasing activities, friendships, and daily camp life.

Top 5 Recommended Actions and Final Takeaways

1 **Expand affordability strategies to reach more families.**
Develop targeted financial assistance for middle-income families, explore introductory pricing and shorter session options, and test multi-year support to make camp more financially accessible.

2 **Make financial aid simpler, more transparent, and easier to access.**
Clearly communicate eligibility, likely out-of-pocket costs, and available assistance before families begin registration. Simplify application processes and reduce uncertainty about affordability.

WHAT FJC IS DOING:

- **Road To Camp Initiative**
- **Scholarship Pilots**
- **One Happy Camper Incentives**
- **Best Practice Guide in Scholarships**

Top 5 Recommended Actions and Final Takeaways

3 **Emphasize and demonstrate quality, care, belonging, and Jewish value at camp.**
Camps can use strong messaging to highlight staff quality, safety, inclusion, social-emotional support, meaningful Jewish experiences, and individualized camper care at camp. Funders, FJC and alumni can continue to Champion Jewish Camp.

4 **Strengthen recruitment through trusted community relationships.**
Mobilize parent ambassadors, alumni, congregations, Jewish organizations, and community partners to generate referrals, build confidence, and create stronger pathways from interest to enrollment.

5 **Engage families earlier and build children's readiness and enthusiasm for camp.**
Develop diverse recruitment strategies, offer introductory camp experiences and visits for parents and children to create familiarity, and create child-centered content showcasing activities, friendships, and daily camp life.

WHAT FJC IS DOING:

Championing Jewish Camp

Wave 2 Research on Parent and Child Readiness

Thank You!

Questions?

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מחנות רמה
Ramah
Camping Movement

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