

ONE HAPPY CAMPER®

NORTH AMERICAN SUMMARY 2023

Prepared by Foundation for Jewish Camp & Summation Research



NORTH AMERICAN IMPACT OF THE ONE HAPPY CAMPER® PROGRAM (OHC)

This report evaluates the impact of the 2023 One Happy Camper Program (OHC) implemented by 101 partner organizations (local Jewish federations, foundations and camps) throughout North America. This past summer, 7,000 children received first-time OHC grants, a decrease of 13% from 2022.

The analysis of this year's program is based on survey research among **2640 OHC GRANT RECIPIENT** families (44%), a highly representative sample. This research has once again been supplemented, where appropriate, with data from the 2023 Camper Satisfaction Insights study (CSI), which included a total of 9,026 families from 85 North American Jewish camps. The CSI study was also conducted by outside evaluators at Summation Research Group, Inc.

The findings indicate that OHC continues to be highly successful in (1) bringing thousands of children to overnight Jewish camp, (2) creating engagement and connections between camp families and sponsoring organizations, and (3) generating a "trial" first-time Jewish overnight camp experience that is creating "happy campers" who are highly satisfied, which is leading to high levels of retention.

THE IMPACT OF COVID

As we have noted in our summaries over the last few years, Covid changed our lives in ways too numerous to count. 2020 changed the camping world in ways we are still trying to understand, but we are now starting to see a return to more of the pre-covid "normal" that we had become used to. Some of the changes we saw appear to have been more short-term, but we will continue to track these carefully to see if they continue to remain at pre-Covid levels.

The 2023 data seems to be more in line with 2019 (pre-pandemic) data and the major shifts we saw in age range and synagogue affiliation have returned to pre-Covid levels.

BACKGROUND

The challenge of passing along Jewish connection and commitment to the next generation has become one of the most important concerns of the American Jewish community. There is compelling evidence that Jewish overnight camp is a proven means of building Jewish identity, community, and leadership.

According to Foundation for Jewish Camp's (FJC) 2023 Camper and Staff Satisfaction Insights Surveys, 93% of families report that overnight camp made their child feel part of the larger Jewish community and peoplehood. Camp is such an impactful experience that 62% of staff members reported that they had attended a Jewish overnight camp in their youth. Moreover, Jewish overnight camp makes for sensational summers; 93% of camper families reported high levels of satisfaction with their child's overnight camp experience.

Since camps reopened after Covid, One Happy Camper has helped drive enrollment which has grown by 12% since 2021 FJC estimates that 22,500 new campers attended Jewish overnight camp in 2023, representing 31% of the total overnight camper population at **160+ NONPROFIT**

JEWISH OVERNIGHT CAMPS across North America. The OHC incentive program continues to drive enrollment by helping to reduce both the financial and attitudinal barriers that exist for many Jewish families.

* For more information about this study, go to <http://www.jewishcamp.org/research>.

2023: KEY FINDINGS

Similar to 2022, the impact of the 2023 program has been assessed in terms of its return-on-investment, based on three distinct components:

- I. OUTREACH:** The number and characteristics of new campers generated by the OHC incentive program.
- II. ENGAGEMENT/CONNECTIVITY:** Relationships with partnering organizations and Jewish engagement created by OHC and the Jewish camp experience.
- III. QUALITY OF EXPERIENCE:** Satisfaction and retention levels of OHC recipients.

I. OUTREACH

In 2023, **7,000 CHILDREN** attended camp for the first time using an OHC incentive. We know, however, that like incentive programs for other goods or services, OHC "rewards" some families who would have sent their child to camp, with or without the incentive. To account for this, respondents are segmented into three groups based on their reported likelihood of sending their child to camp had OHC been unavailable. These three groups and the number of respondent families they represent are:

	2023 Total OHC (% OHC Respondents)	2022 Total OHC (% OHC Respondents)	For reference: 2019 Total OHC (% OHC Respondents)
Required*	10%	8%	12%
Contributor**	64%	66%	65%
Bonus***	26%	26%	23%
(n)	2,341	2,712	2,733

* "1" on 1-5 scale--parents who were certain they would **not** have sent their child to camp without the incentive
 ** "2/3/4" on 1-5 scale--parents who may/may not have sent their child to camp without the incentive
 *** "5" on 1-5 scale--parents who were certain they would send their child to camp, *regardless* of the incentive

Based on this segmentation, we believe that **42% OF THE OHC RESPONDENTS MAY NOT OTHERWISE HAVE ATTENDED OVERNIGHT JEWISH CAMP**. This is calculated by combining everyone who "required" the incentive, plus *half* of those where the incentive "contributed" to their decision. Even more compelling is the fact that for many, OHC incentives helped influence their decision to provide their child with a Jewish summer experience. The research shows that from an array of summertime alternatives, only 14% of all respondents said that Jewish camp was always the plan. This means that for 86% of respondents, Jewish camp

was one of several options they were considering from among an array of *mostly secular* alternatives, including 30% who would have simply stayed home.

Consistent with previous years, OHC is helping sponsoring organizations reach *more* deeply into the Jewish community.

	2023 Required	2023 Bonus	2023 Total		For reference: 2022 Total OHC	For reference: 2019 Total OHC
Synagogue-unaffiliated	34%	14%	22%		30%	20%
Interfaith	28%	13%	21%		19%	18%
Parents income under \$100K	49%	5%	17%		16%	28%
At least one non-American parent	16%	15%	24%		24%	22%
OHC Camper Grade: 3 rd or under	12%	26%	17%		14%	17%
7 th or older	46%	18%	27%		30%	24%

This outreach continues to lay the groundwork for a bright future. The OHC program has the potential to build future "legacies" among these new camp families. 31% of all OHC respondents did not have a parent who attended an overnight Jewish summer camp.

In 2023, we began to measure the diversity of our community and there are some interesting demographics to note:

- 22% of total OHC families are racially diverse.
- 5% indicate they have someone in their family who identifies as a person of color.
- 8% of total OHC families say that someone in their family identifies as part of the LGBTQ+ community.
- 12% of total OHC families told us that at least one of their children has a disability (*Disabilities are defined as individuals with autism spectrum disorder or intellectual or developmental disabilities, in addition to individuals with physical or sensory disabilities.*)

II. ENGAGEMENT/CONNECTIONS

One Happy Camper grants are reaching campers and families who are less engaged in Jewish life. For 53% of OHC (non-Jewish Day School) grant recipients, **JEWISH OVERNIGHT CAMP IS THEIR PRIMARY IMMERSIVE EXPERIENCE WITH JEWISH PEERS THROUGHOUT THE YEAR** (i.e., these recipients do not participate in Jewish youth group). And according to the 2017 OHC retention study, over 60% of OHC recipients report a higher degree of involvement/engagement with their temple/synagogue after their summer at camp. For many campers, year-round connections are being made where none may have previously existed. These results will be updated in the next retention study to be conducted in 2025.

For many families, OHC incentives continue to provide sponsoring organizations with an opportunity to engage them *programmatically, philanthropically and emotionally.*

- 71% of OHC respondents are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 78% of OHC respondents believed the incentive "positively" affected their family's connection to the sponsoring organization.
- 77% of OHC respondents believed the incentive "positively" affected their family's connection to the overall Jewish community.
- 75% of OHC respondents were more likely to support the sponsoring organization.

III. QUALITY OF EXPERIENCE

Camper Satisfaction Insights (CSI) results show no meaningful differences between OHC and non-OHC families with respect to overall satisfaction and camp advocacy, meaning OHC campers behave and feel about camp, the same as other campers. CSI assess the impact of, and experience with, Jewish overnight camp and satisfaction with our “product.” While there are a few individual camp exceptions, the findings in all regions are, and have been, consistently outstanding:

	N. American All Campers	N. American OHC Campers
Overall Satisfaction	93%	94%
Likelihood to Recommend	93%	93%
Likelihood to Return to Camp	86%	88%

Based on “5”/“4” ratings on a 5-point scale

Moreover, as further evidence of the quality and value of the summer’s experience. CSI has shown that **children attending these camps are being infused with Jewish education, awareness, and identity:**

	N. American All Campers	N. American OHC Campers
Overall, creates ambiance and atmosphere where your child is proud to be Jewish	94%	95%
Impact on your child’s Jewish identity	88%	89%

Based on “5”/“4” ratings on a 5-point scale

A 2017 OHC retention survey demonstrated that OHC grant recipients behave like all other campers. Once again, the results were overwhelmingly favorable, with return rates in the summer following the first-year incentive exceeding 85%.

The vast majority **(87%) OF OHC RECIPIENTS RETURN TO CAMP FOR A SECOND SUMMER**; retention grows for the third summer as over 90% of second-year campers return.

	OHC Recipients: 2012	OHC Recipients: 2013	OHC Recipients: 2014	OHC Recipients: 2015
Return % 1 Year Later	89%	85%	87%	86%
Return % 2 Years Later	89%	94%	95%	--
Return % 3 Years Later	91%	94%	--	--
Return % 4 Years Later	93%	--	--	--

OHC recipients do not request or require more scholarship; they receive it at the same rate as other campers.

To see more information and read the detailed retention study, please contact Foundation for Jewish Camp.

ADDITIONAL FINDINGS - MARKETING AND RECRUITMENT

49% of Total OHC recipients heard about the incentive from their camps and 30% from friends and family. Interestingly, no recipients indicated that they heard about the incentive from someone in their temple or synagogue; this is down from 17% in 2019. It is still essential that every Jewish professional within the community is aware of the local OHC program and the myriad of Jewish camp opportunities.

Our findings reinforce the need to start recruitment at least 9 months prior to the beginning of camp. 71% of OHC recipients started their camp search/summer planning at least 9 months in advance, while 53% began thinking more than a year ahead. These numbers continue to look more like 2019 levels.

50% of OHC families begin their search with a specific camp. It's important for each camp to maintain attractive and up-to-date marketing materials (including their websites) and quality customer service year-round.

STUDY BACKGROUND

This research was conducted via an online survey, administered through the One Happy Camper registration system, and emailed to the applicant's parents AFTER they were notified that the grant had been approved. This study was conducted by outside evaluators at Summation Research, Inc.

2640 surveys were completed out of a possible 5978 North American OHC recipients who were sent the survey, for a response rate of 44%, +4% points higher than the 40% response rate in 2022. Not all OHC recipients were invited to respond; parents of siblings who attended camp were only asked to fill out one survey and select communities opted not to participate.

Charts represent Total OHC respondents, except where noted. Additional findings can be found in the Detailed Findings summary. Contact the Foundation for Jewish Camp for this information.