

ONE HAPPY CAMPER®

NORTH AMERICAN SUMMARY 2024

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 2024 One Happy Camper Program (OHC) implemented by over 100 partner organizations (local Jewish federations, foundations and camps) throughout North America. This past summer 6,800 children received first-time OHC grants, a decrease of 3% from 2023.

The analysis of this year's program is based on survey research among 2,846 OHC grant recipient families (51% response rate), a highly representative sample. This research has once again been supplemented, where appropriate, with data from the 2024 Camper Satisfaction Insights study (CSI), which included a total of 8,776 families from 150+ 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 leads to high levels of retention.

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) 2024 Camper and Staff Satisfaction Insights Surveys, 94% of families report that overnight camp made their child feel part of the larger Jewish community and peoplehood and 91% of camper families reported high levels of satisfaction with their child's overnight camp experience. Camp is such an impactful experience that 64% of staff members reported that they had attended a Jewish overnight camp in their youth.

Since camps reopened after Covid, One Happy Camper has helped drive enrollment which has grown by 4% from 2023 to 2024. FJC estimates that 23,000 new campers attended Jewish overnight camp in 2024, representing 30% of the total overnight camper population at **150+ 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.

2024: KEY FINDINGS

Similar to 2023, the impact of the 2024 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 2024, **6,800 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:

	2024 Total OHC (% OHC Respondents)	2023 Total OHC (% OHC Respondents)	For reference: 2019 Total OHC (% OHC Respondents)
Required*	9%	10%	12%
Contributor**	67%	64%	65%
Bonus***	24%	26%	23%
(n)	2,502	2,341	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
 (n) does not include any respondents who answered "don't know/not sure"

Based on this segmentation, we believe that **43% OF THE OHC RESPONDENTS MAY NOT HAVE ATTENDED OVERNIGHT JEWISH CAMP WITHOUT OHC**. 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 13% of all respondents said that Jewish camp was always the plan. This means that for 87% of respondents, Jewish camp was one of several options they were considering from among an array of *mostly secular* alternatives, including 28% who would have simply stayed home.

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

OHC HOUSEHOLD DEMOGRAPHICS

	2024 Required	2024 Bonus	Jewish Day School Only	All Other School Types	2024 Total	2023 Total
Synagogue-unaffiliated	29%	16%	13%	24%	21%	22%
Interfaith	21%	16%	4%	24%	19%	21%
Parents income under \$100K	44%	5%	20%	14%	16%	21%
At least one N. American parent	55%	29%	37%	35%	37%	32%
Someone in family identifies as a person of color	8%	3%	3%	6%	5%	6%
Somone in family identifies as part of the LGBTQ+ community	9%	7%	3%	9%	7%	8%

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

Understanding the diversity of our community is a focus of Foundation for Jewish Camp. Here are some key demographics of our participants:

- 5% indicate they have someone in their family who identifies as a person of color.
- 7% 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.*)

From 2015 to 2024, household incomes have shifted in the OHC camper family population; this is consistent with the changes we have seen in the separate CSI research. OHC families with incomes of \$200K+ have increased from 17% to 32% over that time frame, while families with incomes of \$100K or less have decreased from 26% to 16%. More wealthy families are applying for OHC now than in the past. It also appears that those with higher incomes are staying at camp longer; affordability plays a big role in that decision. We know from CSI that cost is the main reason families do not return to camp.

II. ENGAGEMENT/CONNECTIONS

One Happy Camper grants reach campers and families who are less engaged in Jewish life. For 49% 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.

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

- 59% of OHC respondents are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 80% of OHC respondents believed the incentive "positively" affected their family's connection to the sponsoring organization.
- 76% 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	94%	95%
Likelihood to Recommend	94%	95%
Likelihood to Return to Camp	87%	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, camp creates ambiance and atmosphere where your child is proud to be Jewish	96%	97%
Camp's impact on your child's Jewish identity	91%	92%

Based on "5"/"4" ratings on a 5-point scale

The 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 grew for the third summer as over 90% of second-year campers returned.

OHC recipients do not request or require more scholarship funding than other campers and they receive scholarship funds at the same rate as other campers.

ADDITIONAL FINDINGS - MARKETING AND RECRUITMENT

51% of Total OHC recipients heard about the incentive from their camps and 29% from friends and family. **It is essential that every Jewish professional within the community is aware of the local OHC program and the myriad of Jewish camp opportunities.**

89% of OHC recipients started their camp search/summer planning at least 9 months in advance, while 66% began thinking more than a year ahead. Our findings reinforce the need to start recruitment at least 9 months prior to the beginning of camp.

63% of OHC families begin their search with a specific camp in mind. 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.

2,846 surveys were completed out of a possible 5,568 North American OHC recipients who were sent the survey, for a response rate of 51%, 7% points higher than the 44% response rate in 2023. 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.