

Detailed Findings

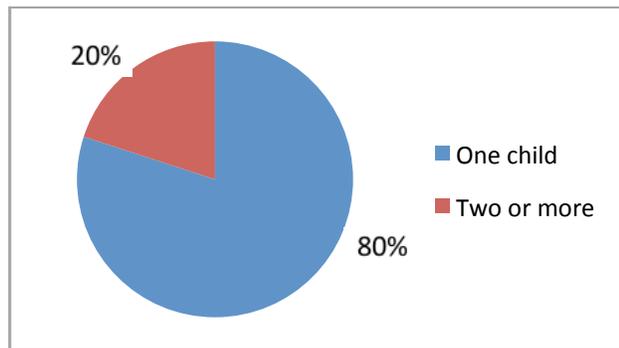
I. RECIPIENT PROFILE -- Family and Camper

About the Family and Parents of OHC Campers

- Most families (80%) were applying for OHC for one child. 37% of OHC camper siblings had received a grant this summer or in previous summers.
- 20% (or 1,470) of OHC families (projected to the total OHC recipient group) have no affiliation with a synagogue.
- 33% (or more than 2,425) of OHC campers (projected to the total OHC recipient group) did not have a parent who attended Jewish overnight camp.
- Relative to national profiles, OHC parents are relatively upscale, similar to what we've seen for camp families in general and 73% were *both* born in the U.S.
- More than 20% are families with only one Jewish parent.

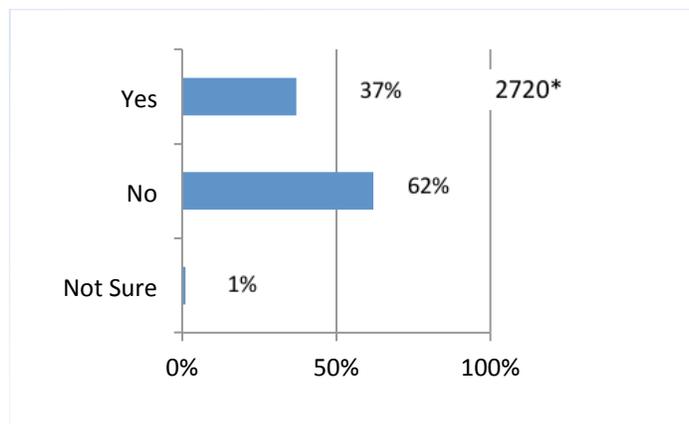
Family History with One Happy Camper

Number of family members receiving incentive



Similar results in 2017

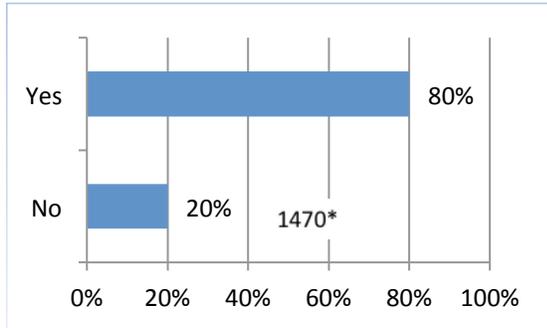
Did any siblings receive an incentive this summer or in previous summers?



*Projected total based on research percentage applied to total North American OHC recipient number

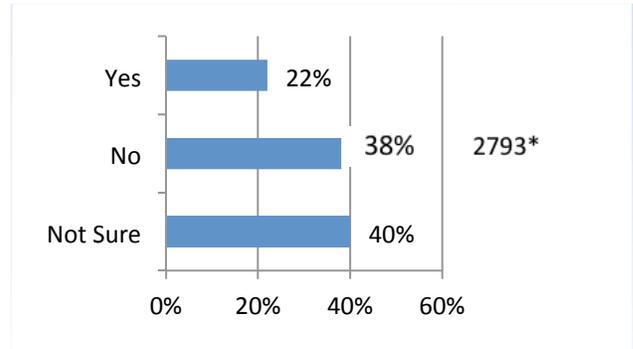
Synagogue and Affiliation

Affiliated with a synagogue or temple?



Similar results in 2017

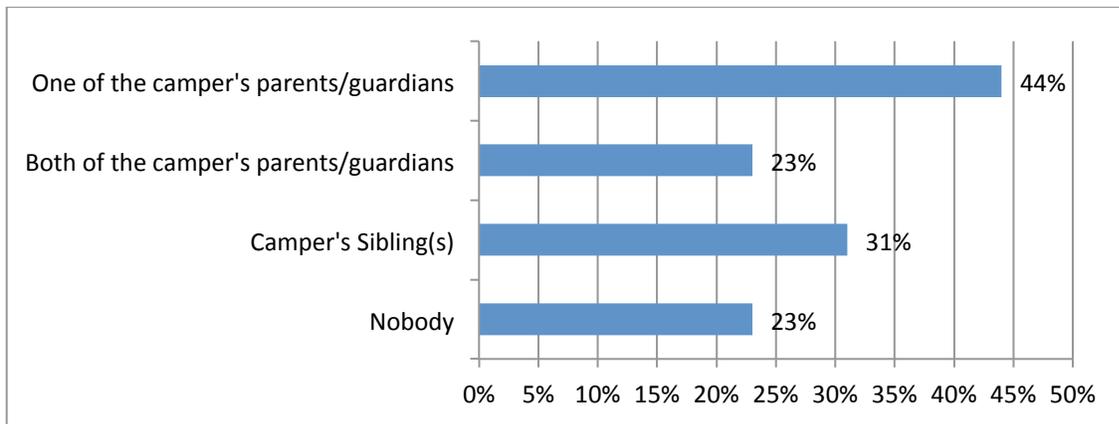
Does your temple/synagogue offer their own financial incentives/scholarships?



Similar results in 2017

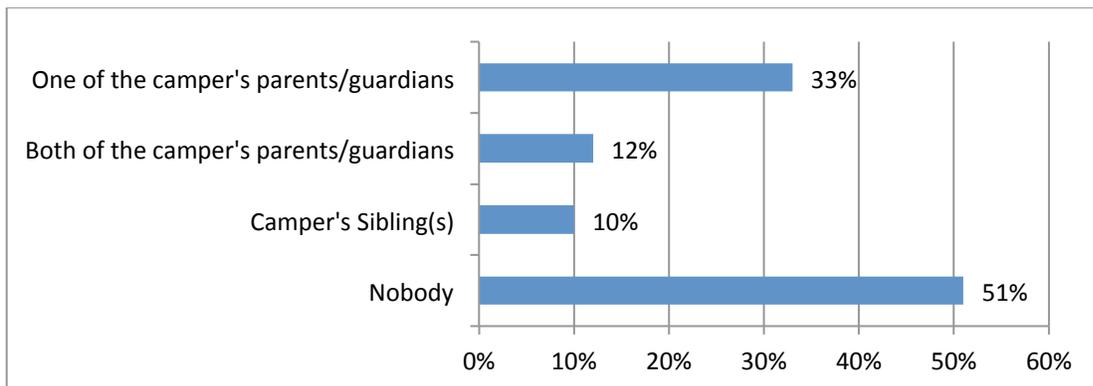
Previous family experience at overnight camp

Jewish overnight camp



Similar results in 2017

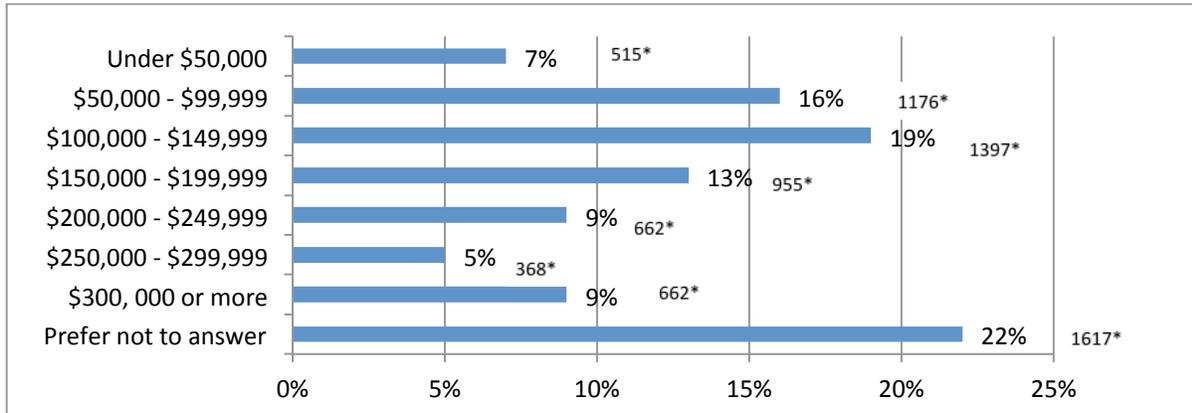
Non-Jewish overnight camp



Similar results in 2017

OHC Family Profile

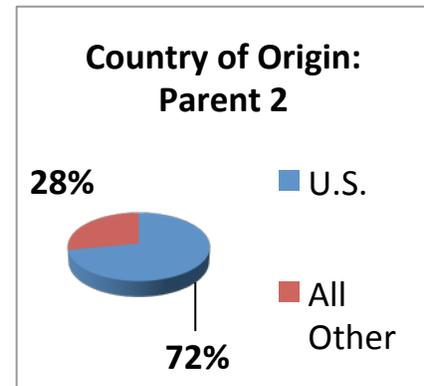
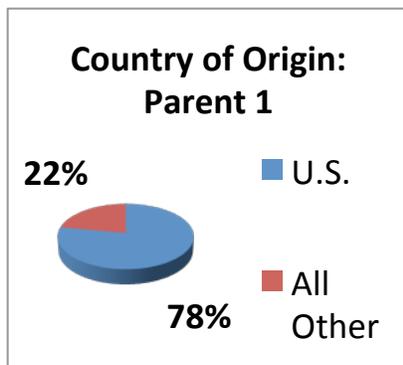
Total HH Income:



Similar results in 2017

*Projected total based on research percentage applied to total North American OHC recipient number

Both Parents American Born



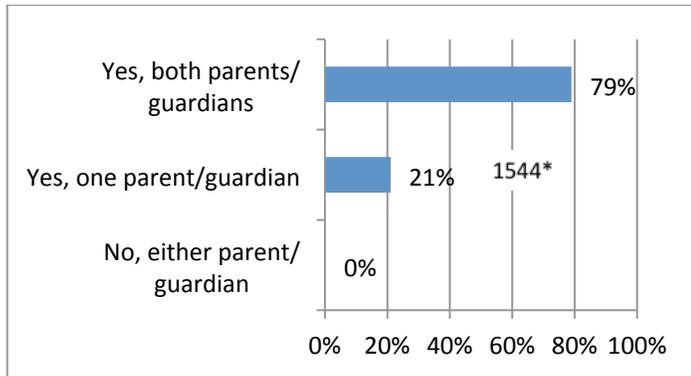
Similar results in 2017

If not, where:

Country of Origin:	Parent 1	Parent 2
United States	(5,733*) 78%	(5,292*) 72%
Canada	(662*) 9%	(588*) 8%
Israel	(294*) 4%	(441*) 6%
Russia	(147*) 2%	(147*) 2%
Ukraine	(147*) 2%	(147*) 2%
S. Africa	(74*) 1%	(74*) 1%
United Kingdom	(74*) 1%	(74*) 1%
Other	(294*) 4%	(662*) 9%

*Projected total based on research percentage applied to total North American OHC recipient #

Do either one or both of the camper's parents/guardians identify as being Jewish?



Similar results in 2017

**Projected total based on research percentage applied to total North American OHC recipient number*

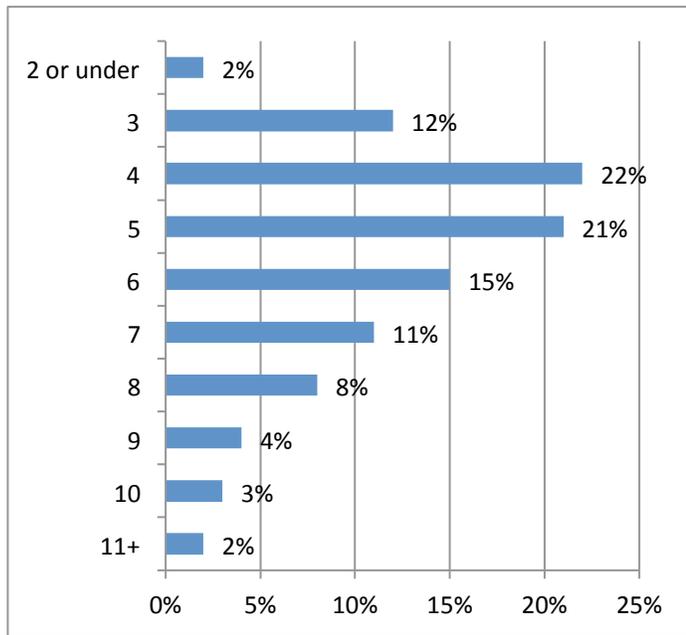
About the Camper

- Most OHC recipients are first-time campers. More than 50% of first-time campers do not participate in Jewish youth groups or youth activities, making camp their primary immersive experience with Jewish peers.

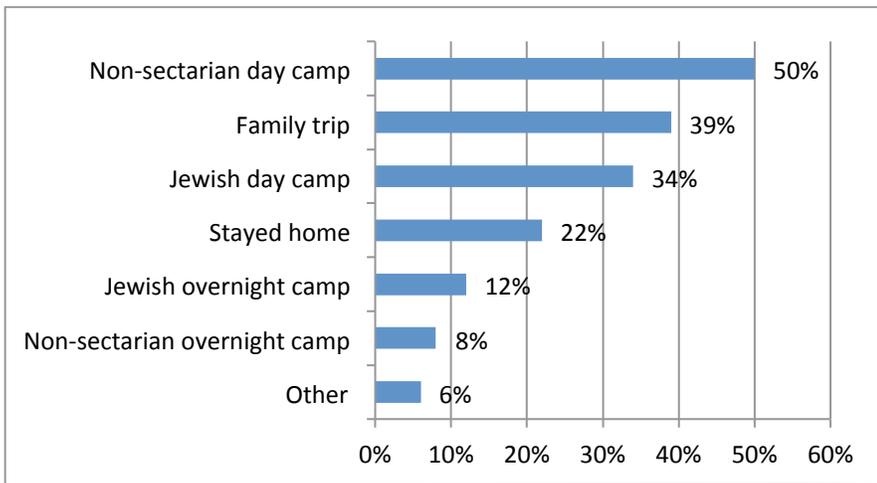
Throughout the year, how often, does your child participate in any of these organized Jewish activities? (excludes all Jewish day school attendees)

	Daily/Weekly	A Few Times/Month	Every Few Months	Never
Synagogue/Temple services	17%	20%	50%	13%
Hebrew/religious school	68%	9%	3%	20%
Jewish youth group/activities	7%	12%	30%	51%
Programs at Jewish Community Center	6%	11%	40%	42%
Community service: service-learning or youth philanthropy project organized by a Jewish organization	2%	6%	42%	50%
Celebration of Jewish holidays	25%	23%	50%	2%
Observance/celebration of Shabbat	38%	23%	29%	9%
Other	15%	3%	7%	75%

Grade of child (youngest camper):



How did they (the 2018 OHC recipient) spend last summer (2017)?

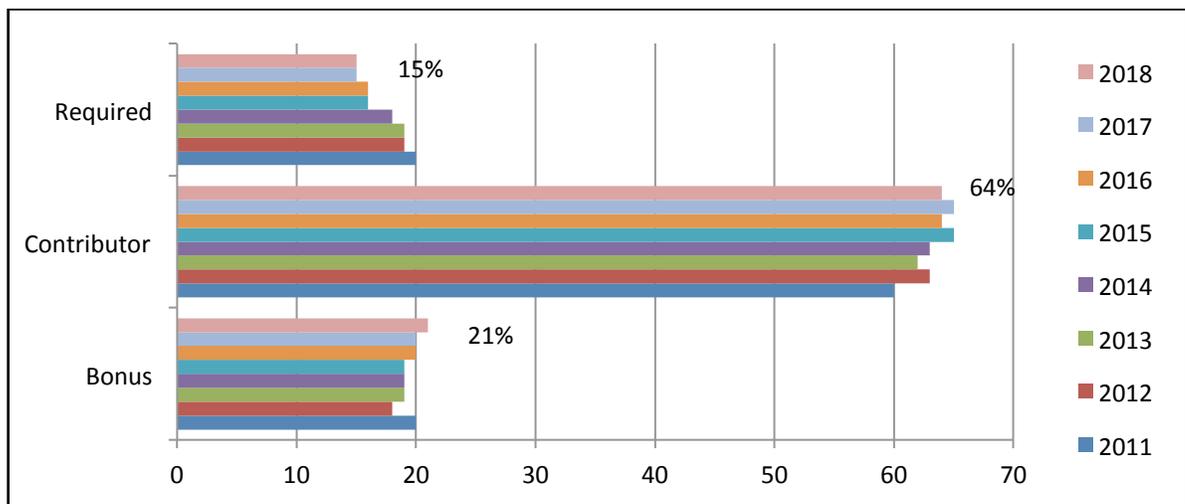


II. THE ROLE OF THE INCENTIVE AS STIMULUS FOR ATTENDING JEWISH CAMP

Role of incentive in summer plans

- In 2018, 15% of OHC recipients comprised the Required group (e.g., “*not at all*” likely to have attended camp without the incentive). Predictably, this group had a higher incidence of lower-income households.
- 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 12% of all recipients said that Jewish camp was always the plan. This means that for 88% of recipients, 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.
- Another striking finding— when the *Bonus* segment (the 20% of generally higher-income parents who were “extremely likely” to send their child to camp, regardless of the incentive) told us about *their* alternatives to Jewish overnight camp, 41% identified *only* secular options. In other words, even when money was less of an issue, the OHC incentive helped steer them towards making a *Jewish* choice. Among *Required* families, 75% identified only secular options.

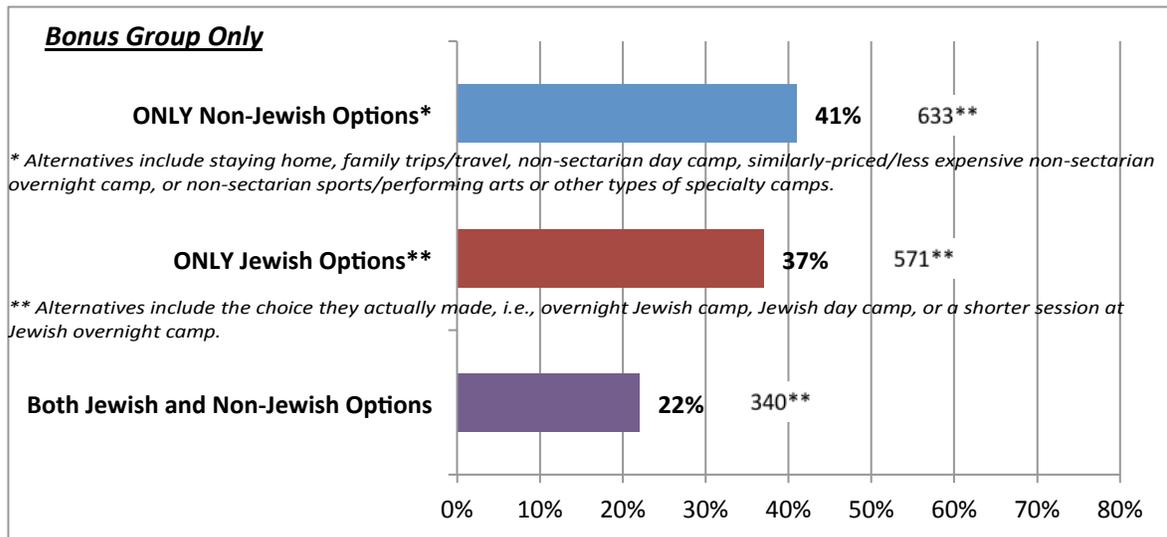
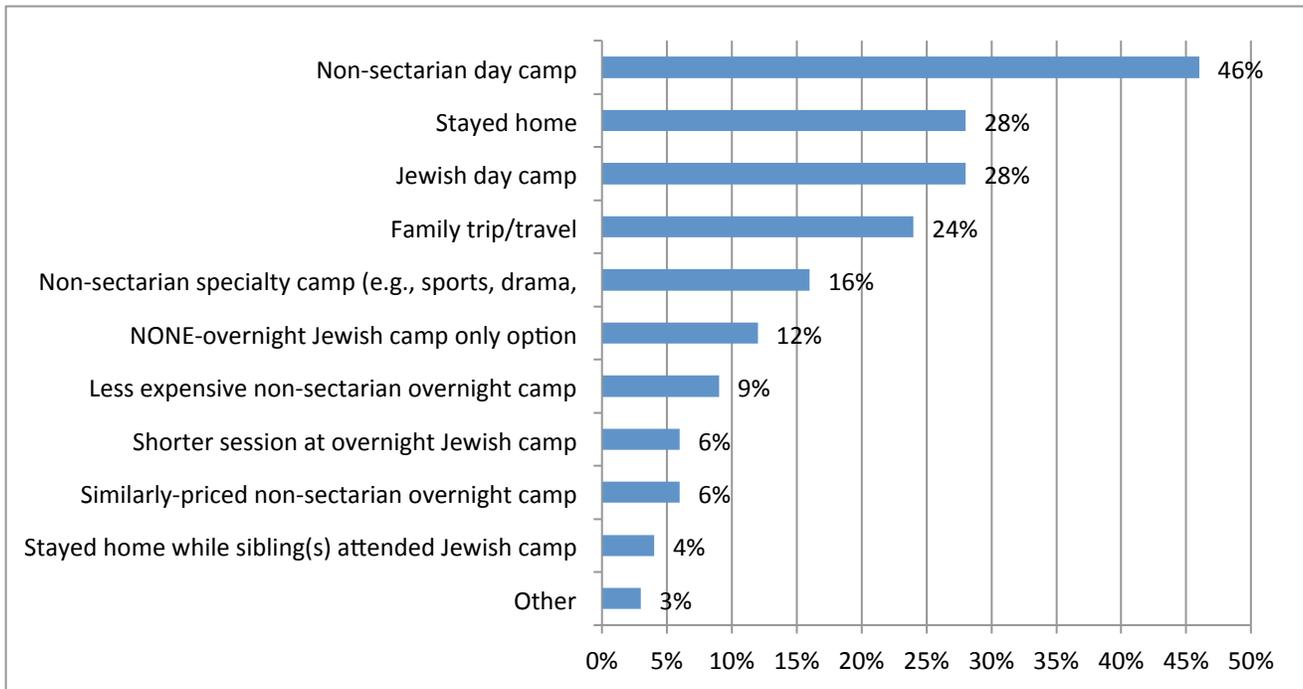
Likelihood that child would have gone to Jewish overnight camp without incentive:



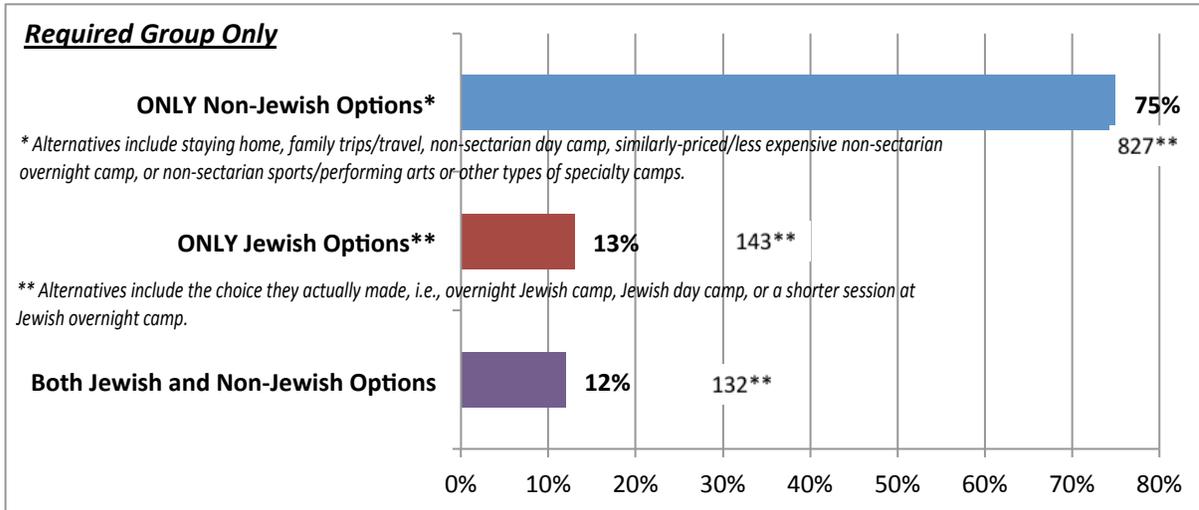
Likelihood that child would not have gone to Jewish overnight camp without incentive (segmented by family **income**):

Total U.S	Required n = 398	Contributor n = 1,707	Bonus n = 575
Under \$100K	52%	20%	8%
\$100 - \$149K	21	22	9
\$150 - \$199K	10	15	11
\$200 - \$299K	3	14	24
Over \$300K	1	6	24
Didn't Provide Income	13	23	24

What would the camper have done this summer if they had not gone to Jewish overnight camp:



**Projected total based on research percentage applied to North American Bonus OHC recipient number

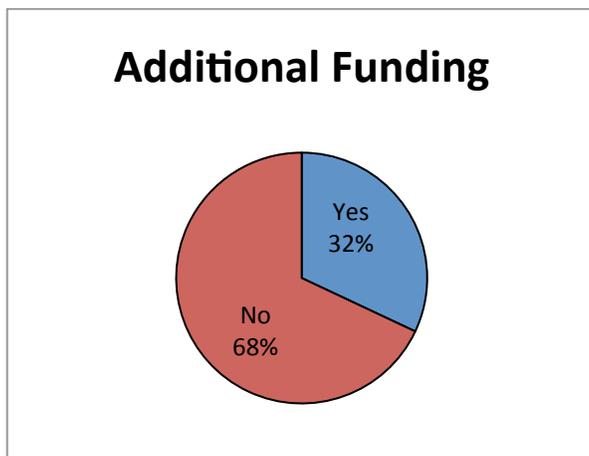


***Projected total based on research percentage applied to North American **Required** OHC recipient number

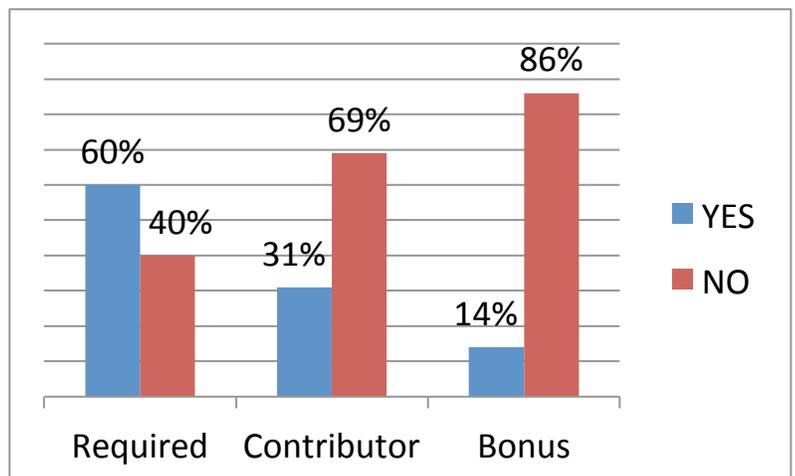
OHC grant as financial assistance:

- Among all parents who said they were less likely to have sent their kids to camp, over 90% cited cost and affordability as the barrier that OHC helped them to overcome.
- 32% of families indicated that they were receiving (or hoped to be receiving) additional outside funding, which is consistent with the findings from the OHC Retention Study. This climbed to 60% among the Required group. This scholarship funding (not OHC incentive funding) was coming primarily from the camps (61%) or from their temple/synagogue (44%).

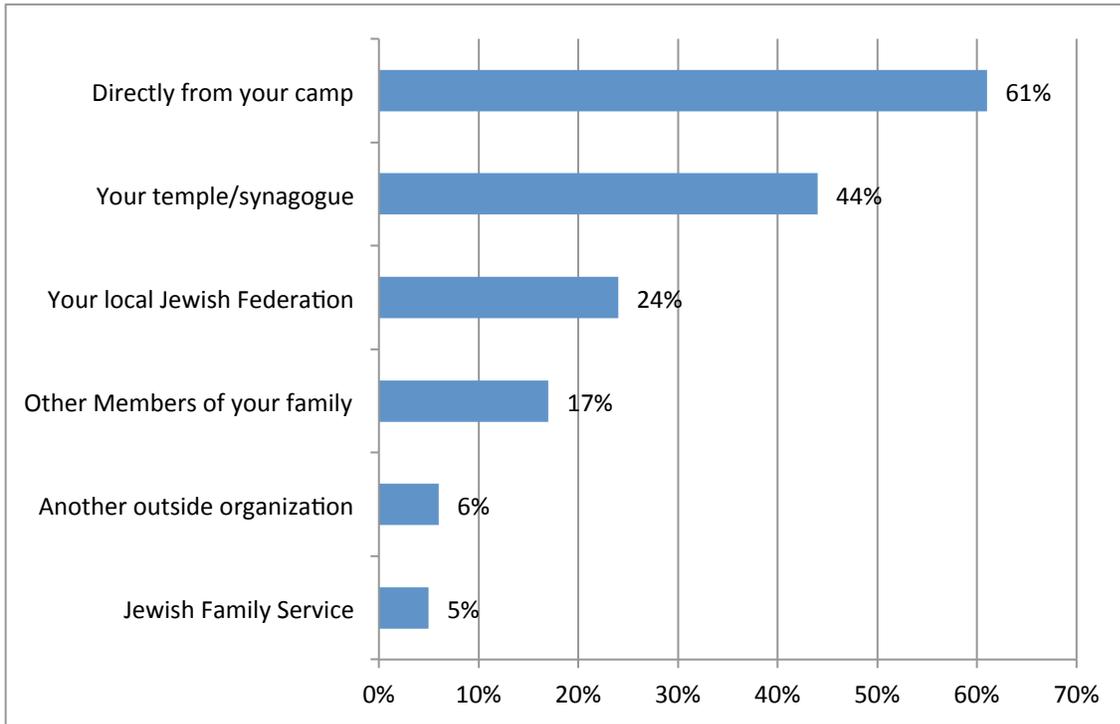
Received (or hoped to receive) additional outside funding:



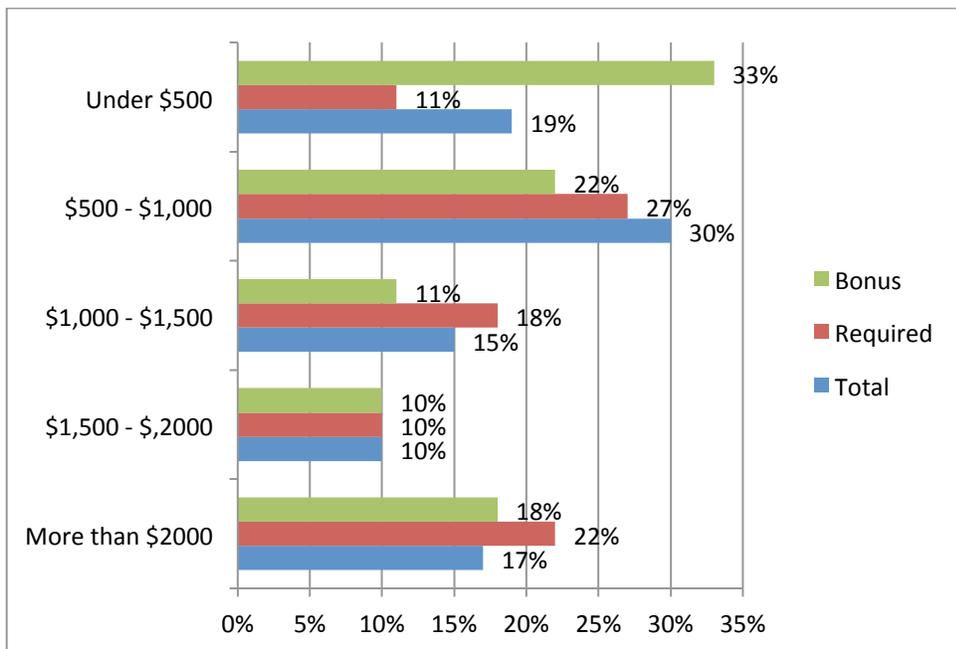
Results similar to 2017



Where does that funding come from:



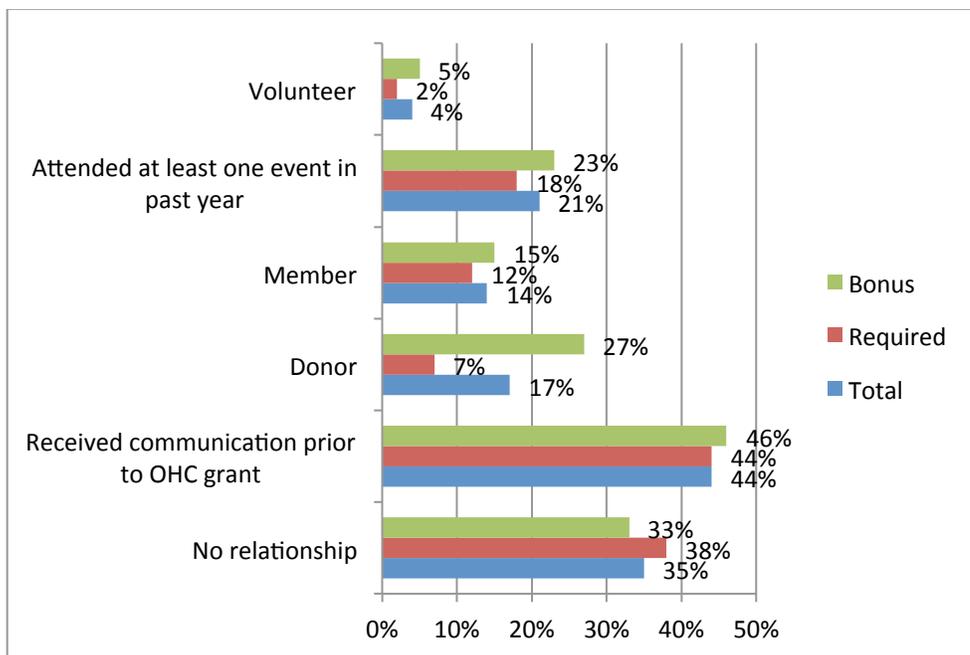
How much additional funding are recipients expecting to receive:



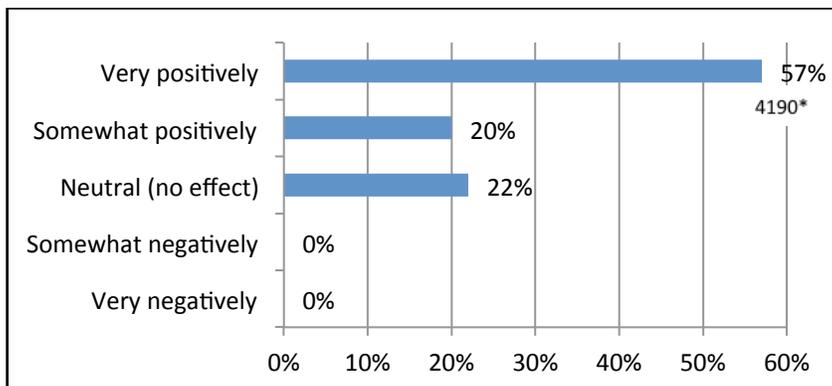
III. JEWISH ENGAGEMENT

- For the majority of families, OHC had the additional perceived benefit of creating closer ties to their Jewish community and/or their Federation.
 - 68% (or nearly 5,000 OHC families projected to the total OHC recipient group) are not currently members and/or donors of their sponsoring organizations, many with giving potential.
 - 57% (or nearly 4,200 OHC families projected to the total recipient group) believed the incentive "very positively" affected their family's connection to the overall Jewish community
 - 66% (or nearly 4,900 OHC families projected to the total recipient group) believed the incentive "very positively" affected their connection to the local Federation.
 - 74% (or nearly 5,500 OHC families projected to the total OHC recipient group) were more likely to support the sponsoring organization.

Are you a member, a donor, or do you support, in some manner, this organization?

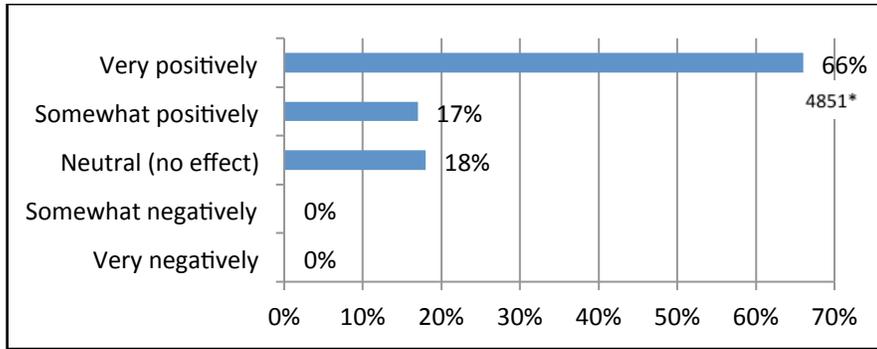


How did the OHC grant affect the family's connection to the overall Jewish community:

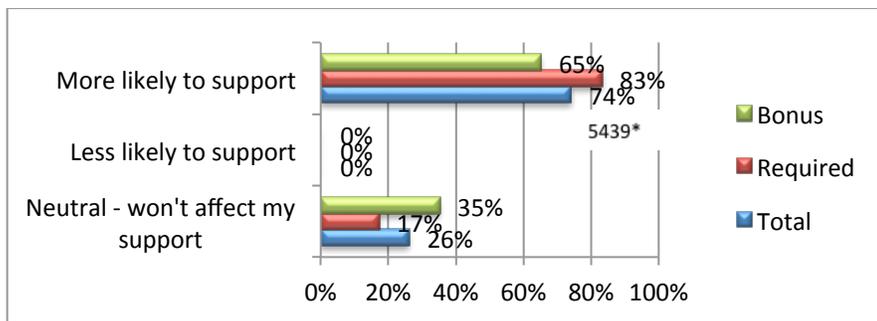


*Projected total based on research percentage applied to total North American OHC recipient number

Did the OHC grant affect the family’s connection to the sponsoring organization:



How might your One Happy Camper experience affect your support for the sponsoring organization?

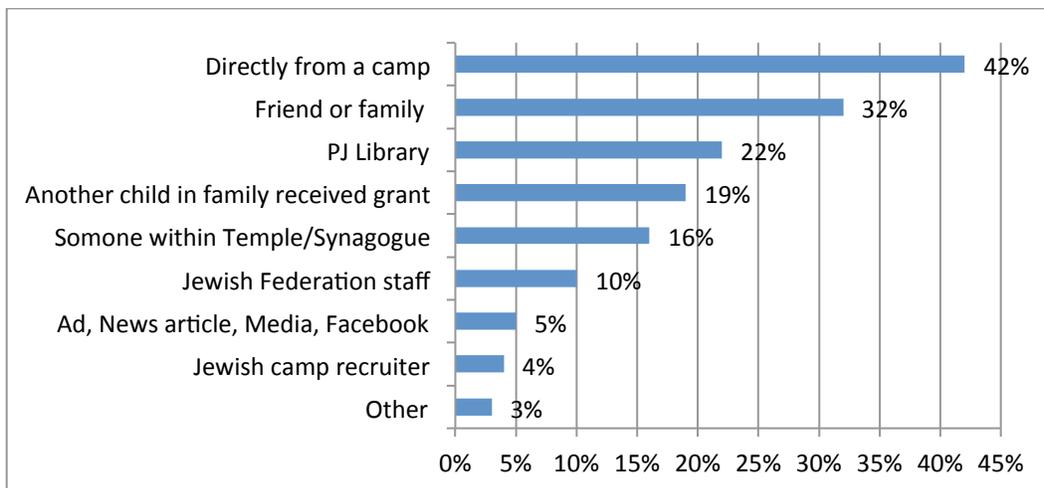


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IV. INCENTIVE AWARENESS AND THE APPLICATION PROCESS

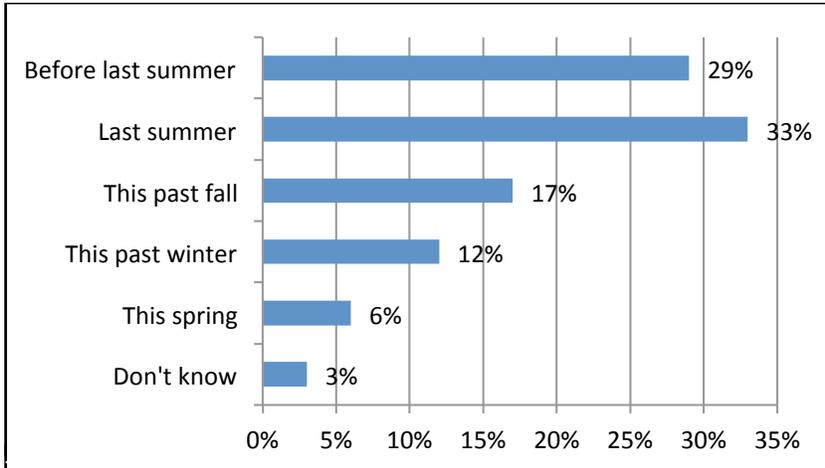
- Parents primarily hear about OHC from the camp and “buzz” from friends and family.
- Most recipients began their search for camp by talking to the camp where a family member attended or talking to the camp directly.
- More than 60% of recipients started their camp search/summer planning at least 9 months in advance.
- The majority of respondents were still not aware that the FJC was a co-sponsor of this program

How did you hear about the OHC Program?

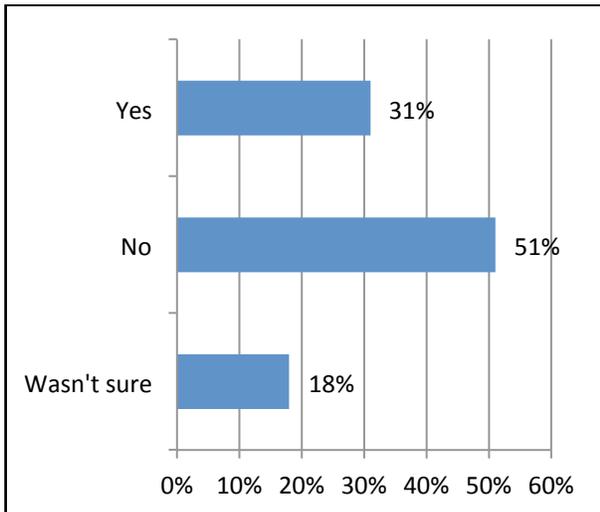


* Based on results from the total North American OHC recipient group

At what point did you begin specifically considering Jewish overnight camp for this summer of 2018?



Were you aware that the Foundation for Jewish Camp is also a co-sponsor of this program:



Appendix I - Scope of OHC Program since 2006

Summer	# of Partners	# Incentive Campers
2018	110*	7,350
2017	100*	7,500
2016	101*	7,050
2015	69	7,300
2014	68	7,300
2013	65	7,300
2012	69	8,400
2011	67	8,600
2010	55	8,500
2009	37	6,200
2008	21	3,400
2007	7	1,800
2006	1	725

*Please note: beginning summer 2016, camps affiliated with a movement are now being counted independently and not as a single camp movement.

Communities participating in the 2018 OHC program:

- | | |
|----------------------|---------------|
| Atlanta | Montreal |
| Boston | Nashville |
| Broward County | Nevada |
| Calgary | New Hampshire |
| Central New York | New Haven |
| Charleston | Northern NJ |
| Chicago | Omaha |
| Cincinnati* | Palm Springs |
| Cleveland | Philadelphia |
| Colorado | Pittsburgh |
| Columbus | Portland |
| Delaware | Rhode Island |
| El Paso | Rochester |
| Greater Metrowest NJ | San Antonio |
| Greensboro | San Diego |
| Hartford | San Francisco |
| Heart of NJ | Seattle |
| Houston | St. Louis |
| Indianapolis | Tidewater |
| Kansas City* | Toronto |
| Los Angeles | Washington DC |
| Louisville | Tidewater |
| Milwaukee | |

In addition, PJ Library and 57 camps participated in the 2018 OHC program.
 (**These communities do not use the OHC Registration System and therefore do not participate in the survey).

Appendix II - Response Rates by Participating Partners

	# Campers invited	# of survey responses	Response Rate
PJ Goes to Camp	820	549	67%
Union for Reform Judaism	407	215	53%
Jewish Federation of Greater Los Angeles	439	216	49%
Combined Jewish Philanthropies of Greater Boston	330	157	48%
JUF Chicago	313	160	51%
UJA Federation of Greater Toronto	300	172	57%
Jewish Federation of Greater Atlanta	296	141	48%
Jewish Federation of Greater Philadelphia	221	97	44%
Jewish Federation of Greater MetroWest NJ	205	93	45%
National Ramah Commission	197	47	43%
Generations Fund/Federation CJA	193	92	48%
Jewish Community Federation of San Francisco	143	66	46%
Jewish Federation of Northern New Jersey	118	39	33%
JewishCOLORADO	103	64	62%
Jewish Federation of San Diego County	93	52	56%
Jewish Federation & Jewish Education Center of Cleveland	86	35	41%
Jewish Federation of Greater Houston	76	42	55%
Jewish Federation of Broward County	69	43	62%
Jewish Federation of Greater Washington	61	34	56%
Jewish Federation of Greater Pittsburgh	61	32	52%
Jewish Federation of Greater Portland	57	29	51%
Jewish Federation of St. Louis	53	34	64%
Jewish Federation in the Heart of New Jersey	46	24	52%
Jewish Federation of Greater Seattle	36	17	47%
Farash Institute for Jewish Education	31	21	68%
Jewish Federation of Columbus	30	16	53%
Jewish Federation of Greater Hartford	26	11	42%

2018 One Happy Camper Evaluation

n = 2,868 (49% response rate)

November, 2018

Jewish Federation of Greater New Haven	23	14	61%
Jewish Nevada	22	12	55%
Jewish Federation of San Antonio	22	12	55%
Jewish Federation of Greater Indianapolis	20	9	45%
Tidewater Jewish Foundation	17	6	35%
Milwaukee Jewish Federation	16	12	75%
Jewish Community of Louisville	14	7	50%
Jewish Federation of Nashville	13	8	62%
Jewish Federation of New Hampshire	9	7	78%
Calgary Jewish Federation	8	3	38%
Jewish Federation of Delaware	6	2	33%
Greensboro Jewish Federation	6	5	83%
Charleston Jewish Federation	6	4	67%
Jewish Federation of El Paso	4	3	75%
Jewish Alliance of Greater Rhode Island	3	1	33%
Jewish Federation of Madison	0	0	0%
Jewish Federation of CNY	0	0	0%
CAMP PARTNERS			
Habonim Dror Camps (2)	14	7	50%
All Other Camps (21)	410	200	49%