



TO: Foundation for Jewish Camp
FROM: Summation Research Group
DATE: May 7, 2017
SUBJECT: 2017 One Happy Camper Retention Study



This presents findings from the One Happy Camper (OHC) Retention Study, fielded March 9-April 2, 2017 among 23,925 families who received OHC incentives in 2012 through 2015. In total, 20% (4,728) of OHC families responded and participated in the study. Findings were consistent with those in 2012, showing very strong retention, even up to *four* summers after having received the initial OHC incentive.

FINDINGS

- 1. The return rate for the first summer immediately following the 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%. (Exhibits 1, 1a, and 2)
- 2. Retention remains very strong in the second, third, and fourth summer as well.** While showing a predictable decline over time, 67% of OHC recipient campers (from 2012) were *still* attending overnight Jewish camp (either as campers or staff) 4 years later. In aggregate, the trend was 87% in the first summer, 80% in the second, 73% in the third, and 67% in the fourth. (Exhibit 2) The return rate, *summer to summer*, (i.e., the percentage of campers returning among the *previous* summer's attendees) actually increased over time, suggesting that the commitment to camp strengthened with each successive summer of attendance. (Exhibit 1a)
- 3. The majority of recipients do not receive financial support when their child returns to camp the summer following their OHC incentive.** Of those returning for the first summer after the OHC incentive, only 40% received any outside funding support. This declined to 36% in the second summer, 33% in the third, and 27% in the fourth. (Exhibit 1)
- 4. Camps have increasingly become the primary source of financial support for campers who request scholarship.** Whereas 53% of returning families in 2013 received support from their camp, that percentage (based on the aggregate of 2012-2015 OHC recipients) grew to 65% in 2014 and 68% by 2016. By contrast, the percentage receiving support from their temple/synagogue showed little change ranging from 40-43% each year over the same time frame. For more than half, the amount of support (asked only regarding the *last* summer they received it) fell in the \$500-\$1,500 range. (Exhibits 3a, 3b, 3c)
- 5. Affordability continues to be a challenge for families with household (HH) incomes below \$100K.** Among all non-returning families, the cost of camp was the #1 reason for not returning, cited by 30%. This was significantly higher than other reasons, including family trip/travel (18%), camper satisfaction (17%), summer job (11%), and aging-out (10%). (Exhibit 4)

Among under-\$100K HH income families, one, two, three, and four-year retention rates were at 79%, 72%, 63% and 56% respectively, each significantly lower than the retention rates shown earlier for the overall sample and lower than higher income segments. And 41% of under-\$100K families who did not

return mentioned affordability (“camp not affordable” or “outside funding/support unavailable”) vs. 24% of those with incomes *above* \$100K. (Exhibit 5)

6. Longer initial session lengths associated with the OHC incentive seem related to higher retention.

88% of campers attending an initial session of 19+ days returned vs. 82% of those attending for 18 or fewer days. This gap grew each year thereafter—83% retention vs. 72% in the second year following the OHC incentive, 78% vs. 61% in the third, and 73% vs. 54% in the fourth. (Exhibit 6)

7. Camp attendance benefits temples/synagogues. For almost one-third (31%) of OHC-recipients, camp attendance had a “great deal” of influence on increasing their *child’s* involvement/engagement in their temple/synagogue. About one-fifth (19%) reported a similar impact on their *family’s* involvement/engagement. Not surprisingly, the impact was somewhat greater for both the children and their families when the child returned to camp in the year (or years) following the incentive. (Exhibit 7)

Exhibit 1: One Happy Camper Retention Over 4 Years

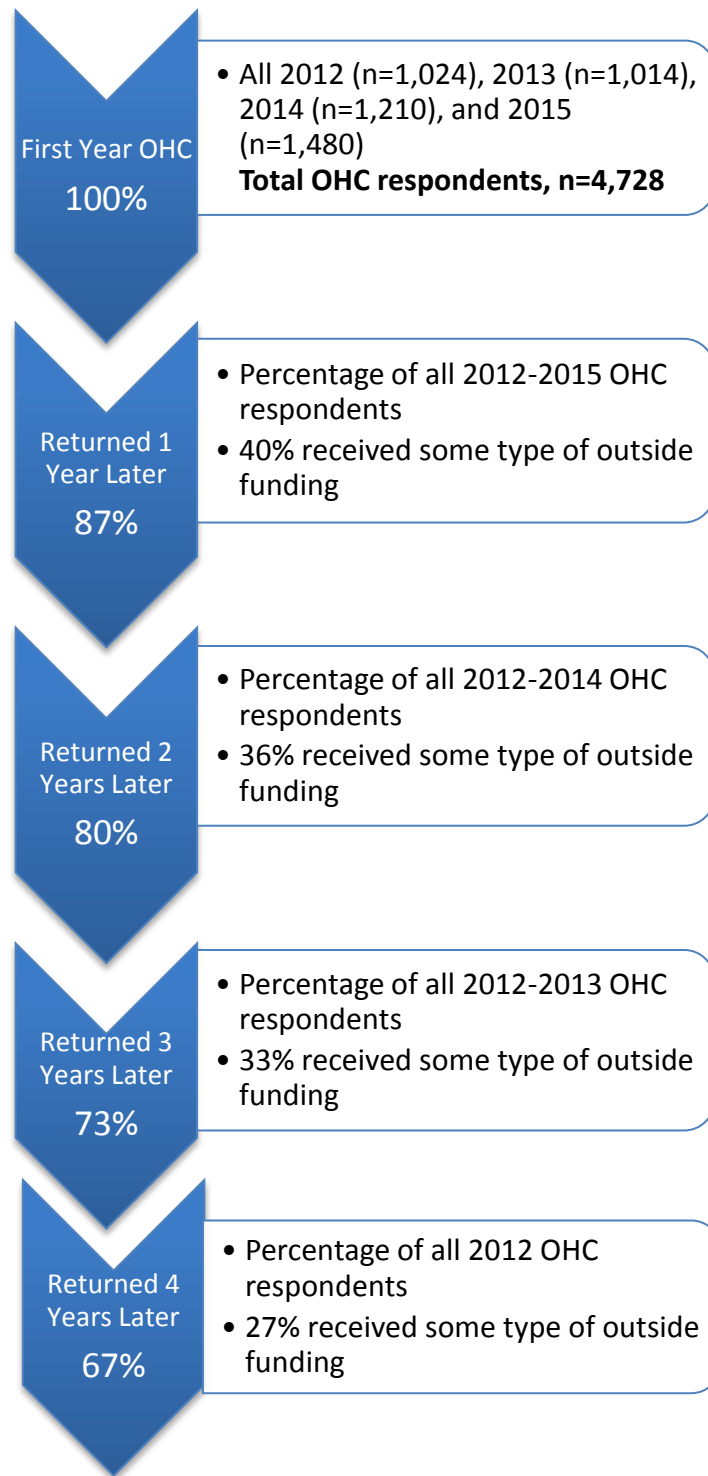


Exhibit 1a: Retention Within OHC Recipient Cohorts

Note: The numbers in each column show the percentage of returnees from the previous summer who returned the following summer. For example, 91% of campers who received a 2012 OHC grant and were still in camp in 2014 (2 years later) were back in 2015 (3 years later).

	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%	---	---	---

Exhibit 2: First Year Retention

Year of OHC Incentive	Returned 2013	Returned 2014	Returned 2015	Returned 2016
2012 OHC Recipients (n=1,024)	89%	79%	72%	67%
2013 OHC Recipients (n=1,014)	---	85%	80%	75%
2014 OHC Recipients (n=1,210)	---	---	87%	82%
2015 OHC Recipients (n=1,480)	---	---	---	86%

Note: First-year retention shown in **red**.

Exhibit 3a: Sources of Outside Funding

Source	2013*	2014**	2015***	2016***
Camp	53%	65%	66%	68%
Temple/Synagogue	40%	44%	43%	43%
Jewish Federation	17%	19%	18%	20%
OHC	21%	11%	7%	6%
Other	10%	10%	11%	10%

* Base=352 2012 OHC recipients receiving outside funding the year after their initial OHC grant

* Base=662 2012-2013 OHC recipients receiving outside funding the year after their initial OHC grant

* Base=1,005 2012-2014 OHC recipients receiving outside funding the year after their initial OHC grant

* Base=1,428 2012-2015 OHC recipients receiving outside funding the year after their initial OHC grant

Exhibit 3b: Outside Funding-Focus on Camp and Temple/Synagogue

Source of Outside Funding: CAMP	Received Camp Funding 2013	Received Camp Funding 2014	Received Camp Funding 2015	Received Camp Funding 2016
OHC Recipients Receiving Outside Funding				
2012 OHC Recipients	53%	63%	67%	67%
2013 OHC Recipients	---	65%	70%	72%
2014 OHC Recipients	---	---	62%	70%
2015 OHC Recipients	---	---	---	65%
Aggregate: 2012-2015 OHC recipients	53%	65%	66%	68%

Source of Outside Funding: TEMPLE/SYNAGOGUE	Received T/S Funding 2013	Received T/S Funding 2014	Received T/S Funding 2015	Received T/S Funding 2016
OHC Recipients Receiving Outside Funding				
2012 OHC Recipients	40%	44%	46%	47%
2013 OHC Recipients	---	44%	45%	41%
2014 OHC Recipients	---	---	40%	40%
2015 OHC Recipients	---	---	---	44%
Aggregate: 2012-2015 OHC recipients	40%	44%	43%	43%

Exhibit 3c: Amount of Outside Funding for the Last Summer Receiving It

Under \$500	13%
\$500-\$999	20%
\$1,000-\$1,499	35%
\$1,500-\$1,999	6%
More than \$2,000	7%
Don't know/Don't remember	17%

Exhibit 4: Reasons for Not Returning (n=1,147)

Camp was not affordable	27%
Family trip/travel	18%
Dissatisfaction with camp experience	17%
Worked at a summer job	11%
Too old to return as a camper	10%
Outside funding/support was not available	10%
Preferred to go to a secular camp	5%
Other	32%

Exhibit 5: Retention and Income

Retention by HH Income	<\$100K	\$100-\$199K	\$200-\$299K	\$300K+
Returned 1 Year Later	79%	89%	92%	90%
Returned 2 Years Later	72%	82%	88%	83%
Returned 3 Years Later	63%	76%	81%	77%
Returned 4 Years Later	56%	69%	75%	71%
Reason for Not Returning: Camp was not affordable/ Outside funding/support unavailable	41%	30%	18%	6%
		-----24%*-----		

* average across \$100K-\$300K+

Exhibit 6: Retention and Session Length

Retention by Session Length	Initial Session Length 18 Days or Less*	Initial Session Length 19+ Days*
Returned 1 Year Later	82%	88%
Returned 2 Years Later	72%	83%
Returned 3 Years Later	61%	78%
Returned 4 Years Later	54%	73%

* Source: original OHC application

Exhibit 7: Camp Impact on Temple/Synagogue Participation

	Total n=3,878*	Camp Returnees n=3,015*	Camp Non-Returnees n=863*
A great deal	31%	33%	27%
Somewhat	32%	33%	28%
Slightly	16%	15%	18%
Not at all	21%	19%	27%

*OHC recipients affiliated with a temple/synagogue; excludes D/K responses

Exhibit 8: Response Rates

	OHC 2012	OHC 2013	OHC 2014	OHC 2015	OHC TOTAL
# Emailed	6,213	5,720	5,973	6,019	23,925
# Responded	1,024	1,014	1,210	1,480	4,728
% Response	16.5%	17.7%	20.3%	24.6%	19.8%