

ONE HAPPY CAMPER.®

NORTH AMERICAN SUMMARY 2019

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 2019 One Happy Camper Program (OHC) implemented by 109 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 8% from 2018.

The analysis of this year's program is based on survey research among **2,733 OHC GRANT RECIPIENT** families (51%), a highly representative sample. This research has once again been supplemented, where appropriate, with data from the 2019 Camper Satisfaction Insights study (CSI), which included a total of 10,821 families from 72 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.

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. Based on the 2010 study by the Foundation for Jewish Camp, *Camp Works: The Long Term Impact of Jewish Overnight Camp*, there is compelling evidence that overnight Jewish camp is a proven means of building Jewish identity, community and leadership.

For example, adults who attended overnight Jewish camp are 30% more likely to donate to a Jewish Federation, 37% more likely to light candles regularly for Shabbat, 45% more likely to attend synagogue at least once per month, and 55% more likely to feel very emotionally attached to Israel.* Moreover, overnight Jewish camp makes for sensational summers; the FJC's CSI research among current campers' families since 2006 has shown extraordinarily high levels of enthusiastic satisfaction with, and endorsement of, the Jewish camp experience.

Over the past decade, Jewish overnight camp enrollment has grown by 19%, increasing market penetration from 10% to 13%. Still, there is room for tremendous growth in the numbers of Jewish camp-aged children in North America attending one of the **160+ NONPROFIT JEWISH OVERNIGHT CAMPS** across the continent. As such, 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>.

2019: KEY FINDINGS

Similar to 2018, the impact of the 2019 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 2019, **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:

	2019 Total OHC (% OHC Respondents)	2018 Total OHC (% OHC Respondents)	For reference: 2010 Total OHC (% OHC Respondents)
Required [*]	12%	15%	26%
Contributor ^{**}	65%	64%	57%
Bonus ^{***}	23%	21%	17%
(n)	2,733	2,868	2,880

* "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 **45% 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 27% who would have simply stayed home.

Another striking finding - even among higher-income respondents (\$150,000 or more), 48% identified *only* secular options when they told us about *their* summertime alternatives to Jewish overnight camp.

Consistent with previous years, OHC is helping sponsoring organizations reach *more* deeply into the Jewish community. While incentives were utilized mostly by synagogue-affiliated Jewish families, we continue to see increased outreach to a more diverse population, *especially* among the Required segment:

- 27% are unaffiliated with a Synagogue.
- Nearly one-quarter are from an interfaith family.
- More than 55% have income under \$100K.
- More than 30% have at least one non North American parent.
- More than one-third have a first-time camper who was aged 13 or older

	2019 Required	2019 Bonus	2019 Total		2018 Required	2018 Bonus	2018 Total
Synagogue-unaffiliated	27%	13%	20%		28%	11%	20%
Interfaith	24%	12%	18%		25%	14%	21%
Parents income under \$100K	57%	9%	28%		59%	11%	29%
At least one non-American parent	31%	15%	22%		43%	16%	27%
OHC Camper Age: 10 or under	36%	73%	57%		41%	74%	58%
13 or older	36%	9%	19%		27%	9%	15%

Finally, this successful 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. 32% of all OHC respondents did not have a parent who attended an overnight Jewish summer camp. (This is even more pronounced among the Required segment where 47% did not have parents who attended camp.)

II. ENGAGEMENT/CONNECTIONS

One Happy Camper grants are reaching campers and families who are less engaged in Jewish life. For 54% 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 emotionally.*

- 68% of OHC respondents are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 64% of OHC respondents believed the incentive "very positively" affected their family's connection to the sponsoring organization.
- 48% of OHC respondents believed the incentive "very positively" affected their family's connection to the overall Jewish community.
- 74% 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	95%	95%
Overall Value	92%	92%
Likelihood to Recommend	96%	97%
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, creates ambiance and atmosphere where your child is proud to be Jewish	97%	97%
Impact on your child's Jewish identity and/or their participation in synagogue/your local Jewish community.	91%	91%

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

Findings from the 2012 OHC retention research were updated in 2017 and continue to show 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** and retention actually 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

44% of OHC recipients heard about the incentive from their camps, 34% from friends and family, and 17% from someone in their synagogue. Clearly, it's essential that every Jewish professional within the community are 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. 64% of recipients started their camp search/summer planning at least 9 months in advance, while 31% began thinking more than a year ahead.

More than three-fourths 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.
- 2,733 surveys were completed out of a possible 5,400 North American OHC recipients who were sent the survey, for a response rate of 51%, +2 points higher than the 49% response rate in 2018. 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.
- All charts represent total OHC respondents.
- Additional findings can be found in the Detailed Findings summary. Contact the Foundation for Jewish Camp for this information.