

# ONE HAPPY CAMPER<sup>®</sup>

## NORTH AMERICAN SUMMARY 2021

*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 2021 One Happy Camper Program (OHC) implemented by 105 partner organizations (local Jewish federations, foundations and camps) throughout North America. This past summer 9,720 children received first-time OHC grants, an increase of 41% from 2019. This increase is exceptionally high compared to past years due to the cancellation in summer 2020 where there were no new campers. For reference, 47% of this year's research recipients indicated that they were supposed to be a first-time camper in summer 2020.

The analysis of this year's program is based on survey research among **3,110 OHC GRANT RECIPIENT** families (53%), a highly representative sample. This research has once again been supplemented, where appropriate, with data from the 2021 Camper Satisfaction Insights study (CSI), which included a total of 10,807 families from ninety 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**

In 2020, Covid changed our lives in ways too numerous to count. Similarly, the "Lost Camping Year" of 2020 has changed the camping world in ways we are still trying to understand. Because of this, drawing any conclusions about "trends" or even making year-to-year comparisons may be misleading. We cannot say yet if changes are short-term or if Covid has modified behaviors/actions so that changes become more long-term.

As you review the findings below, you will see some differences between the two groups that we have labeled "Would be 2020" and "True 2021" campers. For reference, "Would be 2020" campers are those who planned to attend camp for the first time in summer 2020 and could not because of Covid; "True 2021" campers are those who decided to attend camp for the first time in summer 2021.

There are differences in most key demographics; we will continue to monitor these to determine what this means. Most noteworthy, however, is the significant decrease overall in the percentage of campers aged 13+ for both groups. While we are not sure regarding the reason(s) for this dramatic change, we can hypothesize that this may be directly related to the pandemic and the myriad mental health and financial stresses it caused families – children no longer wanting to be away from home for extended periods of time; only enough money to send younger sibling(s) to camp; need for the teen child to find a job rather than attend camp; need for the teen child to act as childcare for younger siblings while parents went back to work. Any/all of these factors could have led to the decline we saw among this group. Again, we will need to continue to monitor this in future summers to see if this trend continues or reverses itself over time.

## 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 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 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>.*

## 2021: KEY FINDINGS

Similar to 2019, the impact of the 2021 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 2021, **9,720 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:

	2021 Total OHC (% OHC Respondents)	2021 OHC "Would be 2020" (% OHC Respondents)	2021 OHC "True 2021" (% OHC Respondents)	For reference: 2019 Total OHC (% OHC Respondents)
Required*	8%	6%	9%	12%
Contributor**	62%	60%	64%	65%
Bonus***	30%	34%	27%	23%
(n)	3,110	1,444	1,616	2,773

\* "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

Bold numbers in the "Would be 2020" column are significantly different versus the "True 2021" column

Based on this segmentation, we believe that **41% OF THE "TRUE 2021" 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 17% of all "True 2021" OHC respondents said Jewish camp was always the plan. This means that for 83% of respondents, Jewish camp was one of several options they were considering from among an array of *mostly secular* alternatives, including 33% who would have simply stayed home.

Consistent with previous years, OHC is reaching *more* deeply into the Jewish community.

	2021 OHC "Would be 2020"	2021 OHC "True 2021"	2021 OHC Total	For reference: 2019 OHC Total
Synagogue-unaffiliated	18%	22%	20%	20%
Interfaith	17%	17%	17%	18%
Parents income under \$100K	15%	21%	18%	28%
At least one non-American parent	16%	21%	18%	22%
OHC Camper Age: 10 or under	83%	78%	81%	57%
13 or older	3%	5%	4%	19%

Bold numbers in the "Would be 2020" column are significantly different versus the "True 2021" column.

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 "True 2021" OHC respondents did not have a parent who attended an overnight Jewish summer camp.

## II. ENGAGEMENT/CONNECTIONS

OHC grants are reaching campers and families who are less engaged in Jewish life. For 52% of Total 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 most recent 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, and philanthropically.***

- 69% of Total OHC respondents are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 65% of Total OHC respondents believed the incentive "very positively" affected their family's connection to the sponsoring organization.
- 50% of Total OHC respondents believed the incentive "very positively" affected their family's connection to the overall Jewish community.
- 76% of Total 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	91%	92%
Likelihood to Recommend	93%	93%
Likelihood to Return to Camp	86%	87%

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	95%	95%
Impact on your child's Jewish identity	87%	86%

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**

48% of Total OHC recipients heard about the incentive from their camps, 30% from friends and family, and 10% from someone in their synagogue. Clearly, it's 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. 76% of "True 2021" OHC recipients started their camp search/summer planning at least 6 months in advance. It should be noted that this is significantly higher compared to previous years, but not surprising given the "Lost Camping Year of 2020". We will monitor if this returns to a lower level again in future summers.

More than 70% of Total 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.

3,110 surveys were completed out of a possible 5,837 North American OHC recipients who were sent the survey, for a response rate of 53%, +2 points higher than the 51% response rate in 2019. 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.