

Detailed Findings

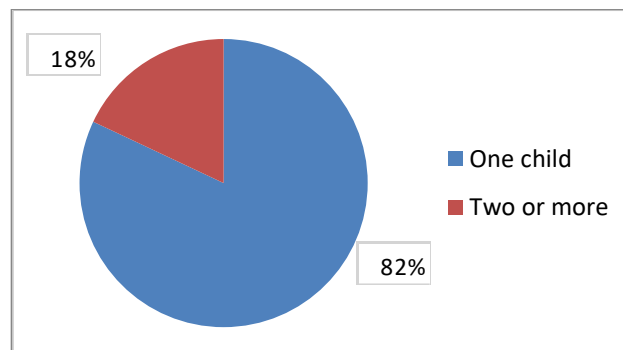
I. RECIPIENT PROFILE – Family and Camper

About the Family and Parents of OHC Campers

- Most families (82%) were applying for OHC for one child. 38% of OHC camper siblings had received a grant this summer or in previous summers.
- 30% (or more than 2,400) of OHC families (projected to the total OHC recipient group) have no affiliation with a synagogue.
- 35% (or more than 2,800) 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 81% were *both* born in the U.S.
- Nearly 20% are families with only one Jewish parent.

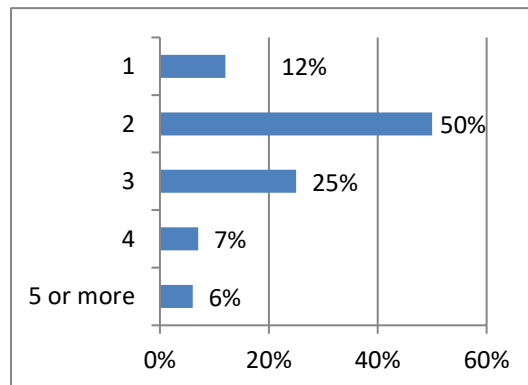
Family History with One Happy Camper

Number of family members receiving incentive



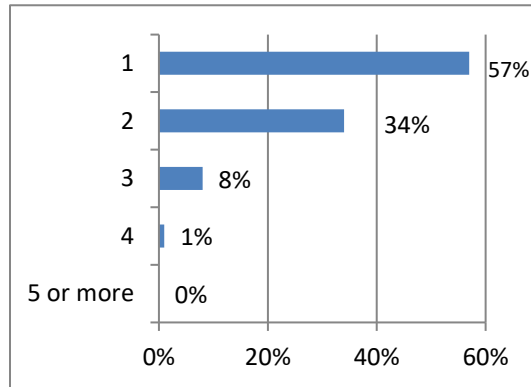
Similar results in 2021

How many dependent children do you have? (Dependent children are defined as living in your household, either at home or, if applicable, away from home while attending college.)



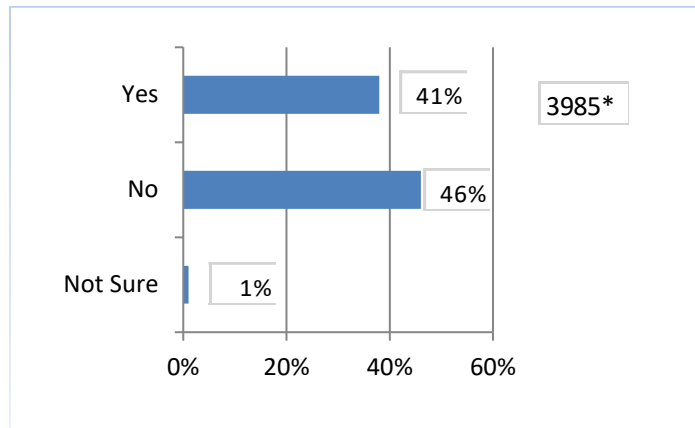
Similar results in 2021

How many children will you be sending to Jewish overnight camp for the summer of 2022?



“Only sending 1 child to camp” jumped from 51% in 2021 to 57% in 2022, consistent with other findings.

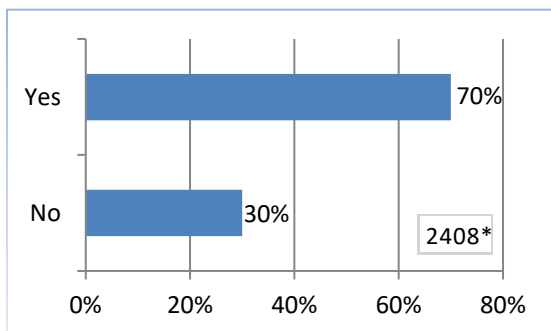
Did any siblings receive an incentive this summer or in previous summers?



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

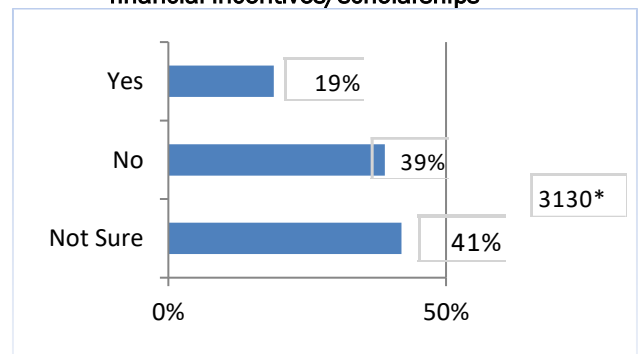
Synagogue and Affiliation

Affiliated with a synagogue or temple?



“Not affiliated with a temple or synagogue” jumped from 20% in 2021 to 30% in 2022, consistent with other findings.

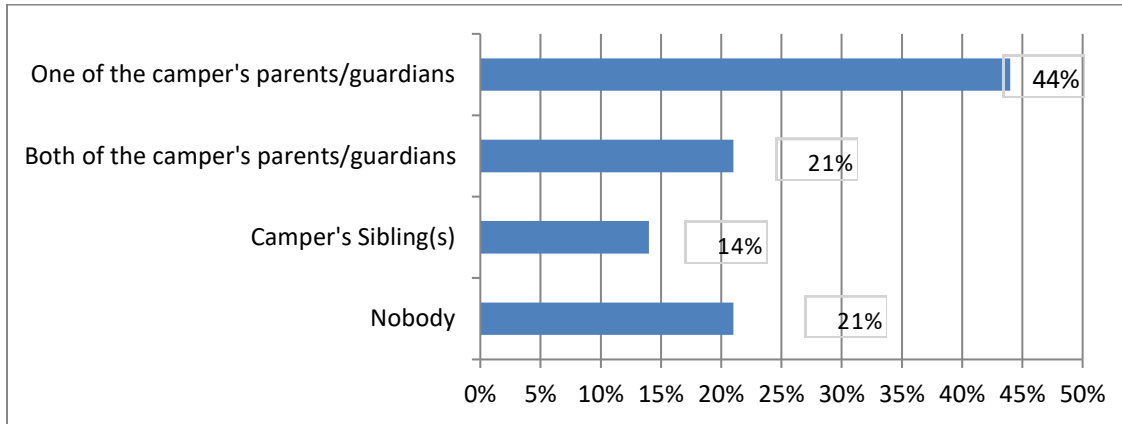
Does your temple/synagogue offer their own financial incentives/scholarships



Similar results in 2021

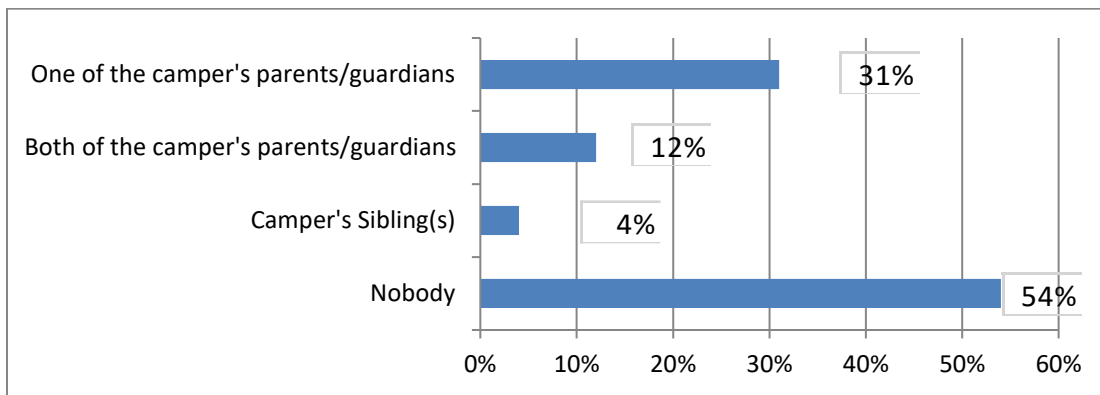
Previous family experience at overnight camp

Jewish overnight camp



Sibling results significantly lower vs 2019 and 2021

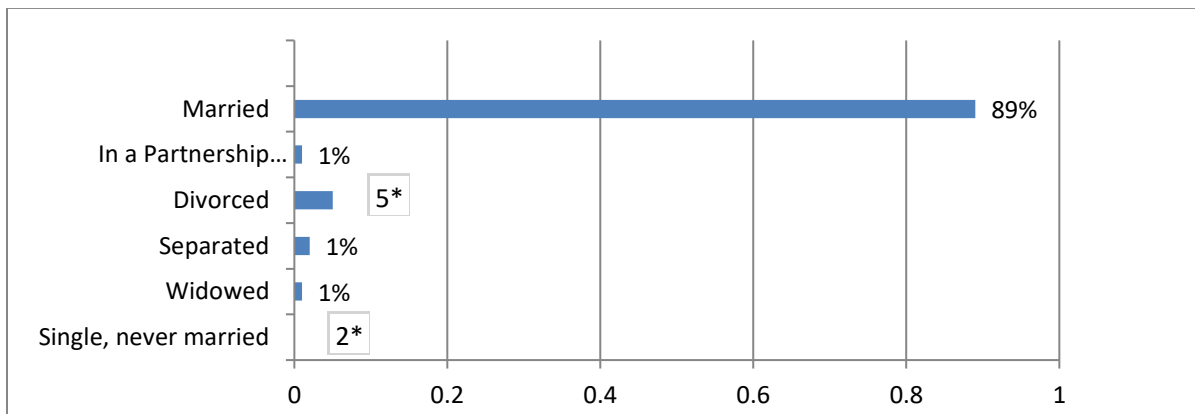
Non-Jewish overnight camp



Similar results in 2021

Additional family demographics

Which of these best describe your marital status?



Similar results in 2021

Parent Age

Parent Age:	Parent 1	Parent 2
25-34	2%	1%
35-44	53%	48%
45-54	41%	45%
55+	4%	6%

Parent Education

Parent Education	Parent 1	Parent 2
Post Graduate Degree	62%	56%
College Degree	33%	34%
Some College	4%	7%
High School Graduate	1%	3%
Some High School	0%	0%

Parent Employment

Parent Employment:	Parent 1	Parent 2
Employed full-time	64%	76%
Employed part-time	12%	5%
Self-employed	13%	13%
Retired	1%	1%
Full-time student	0%	1%
Not employed	10%	5%

Consider your family to be multicultural or multiracial

Multicultural	22%
Multiracial	7%
Neither	71%
Prefer not to answer	5%

Race

African American or Black	2%
Alaska Native	0%
Asian or Asian American	2%
European American	83%
Hawaiian Native or Pacific Islander	0%
Hispanic, Latinx or Spanish	5%
Middle Eastern or North African	4%
Native North American	1%
Not listed here or self-describe	5%
Prefer not to answer	7%

Identify as a person of color

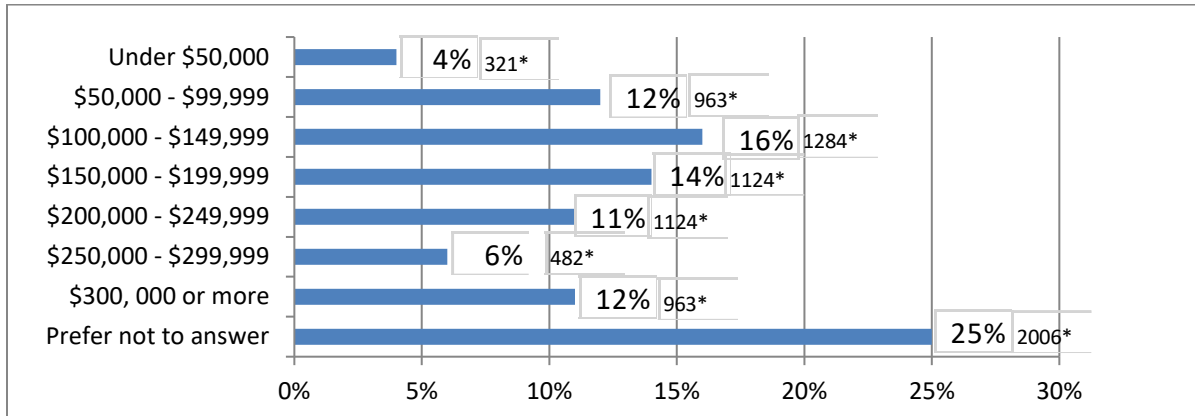
Yes	3%
No	97%

Languages spoken

English	98%
Hebrew	10%
Russian	5%
Farsi	1%
Spanish	4%
Yiddish	1%
American Sign Language (ASL)	0%
Other	4%

OHC Family Profile

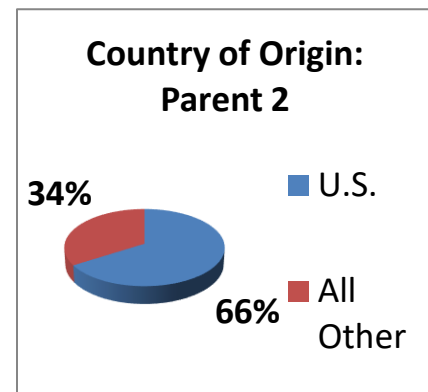
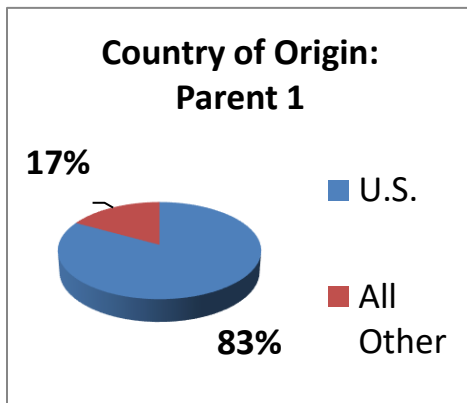
Total HH Income:



Similar results in 2021

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

Both Parents American Born



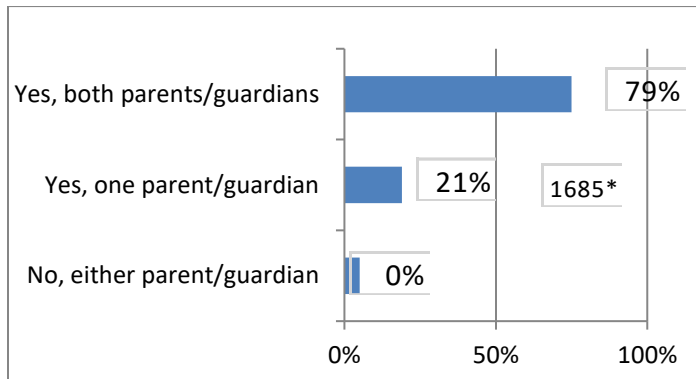
Similar results in 2021

If not, where:

Country of Origin:	Parent 1	Parent 2
United States	(6,6661*) 83%	(5297*) 66%
Canada	(562*) 7%	(401*) 5%
Israel	(241*) 3%	(321*) 4%
Russia/FSU	(241*) 3%	(241*) 3%
Other	(321*) 4%	(1685*) 21%

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

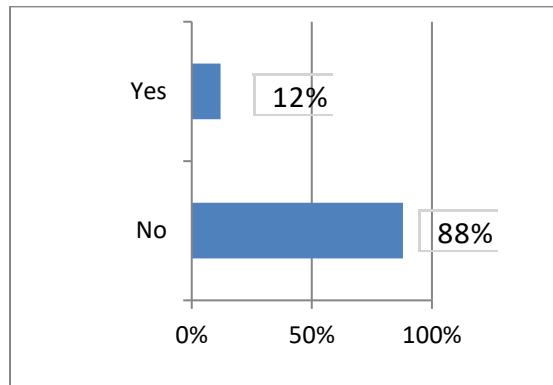
Do either one or both of the camper's parents/guardians identify as being Jewish?



Similar results in 2021

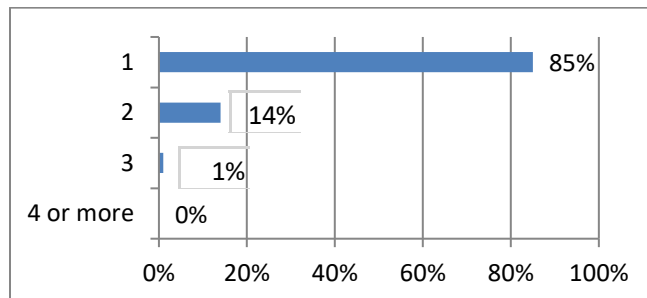
**Projected total based on research percentage applied to total North American OHC recipient number*

Do any of your children attending Jewish overnight camp (including the OHC recipient) have 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.)



Similar results in 2021

If yes, how many?



Similar results in 2021

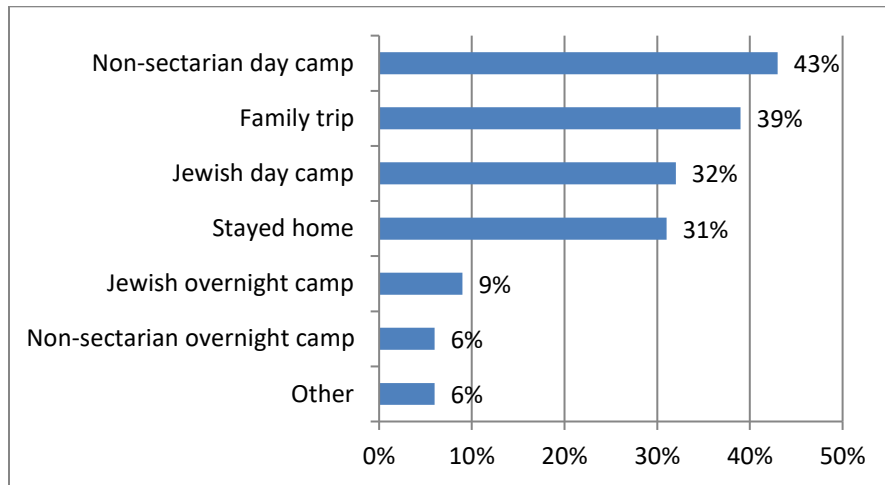
About the Camper

- Most OHC recipients are first-time campers. 49% 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?

	Daily/Weekly	A Few Times/Month	Every Few Months	Never
Celebration of Shabbat	44%	20%	26%	11%
Jewish Day School	26%	0%	1%	72%
Synagogue/temple services	18%	19%	46%	17%
Hebrew/religious school	64%	9%	3%	24%
Jewish youth group/activities	9%	12%	31%	49%
Programs at your Jewish Community Center (JCC)	3%	4%	25%	68%
Community service: Jewish service-learning or youth philanthropy, etc.	2%	4%	34%	60%
Celebration of Jewish holidays	31%	22%	46%	1%
Participation in Jewish and/or Israel cultural events	13%	14%	50%	22%
Other	19%	4%	10%	67%

How did they (the 2022 OHC recipient) spend the last summer (2021)?



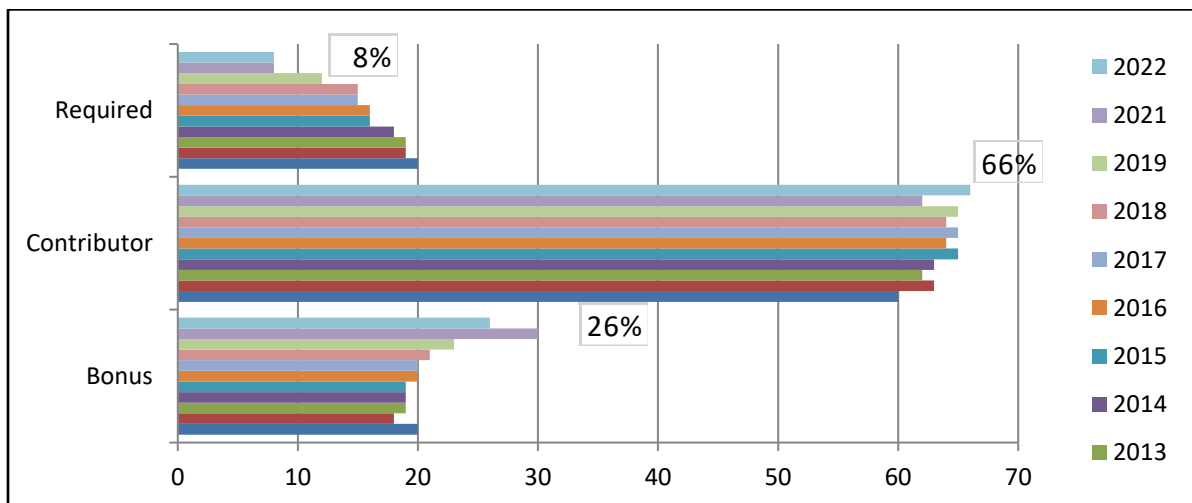
Results in 2022 significantly different vs. 2021 (COVID impact) and more similar to 2019

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

Role of incentive in summer plans

- In 2022, 8% 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 respondents said that Jewish camp was always the plan. This means that for 88% 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.

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

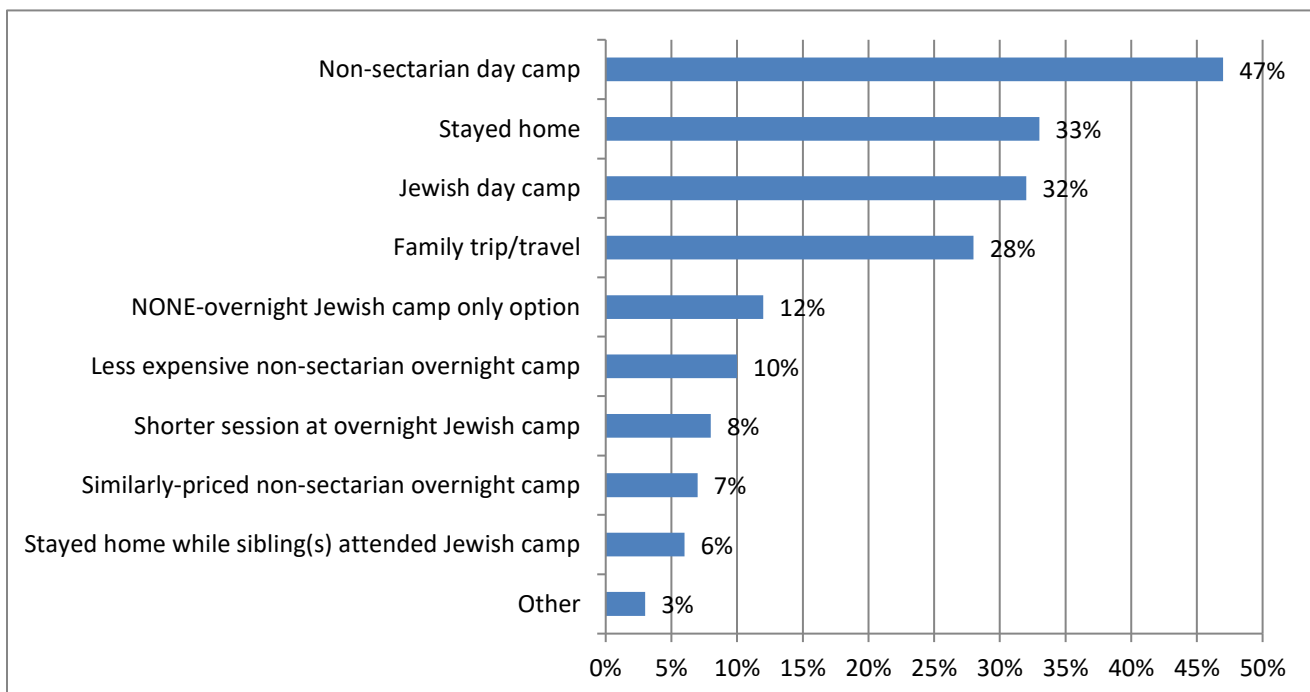


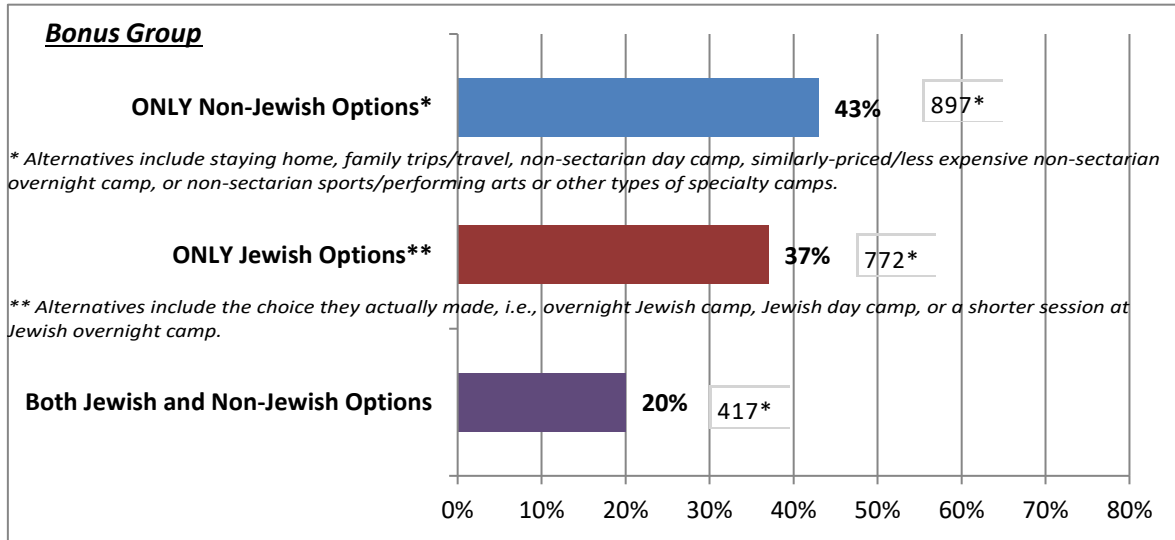
	2022 Total OHC (% OHC Respondents)	2021 OHC "True 2021" (% OHC Respondents)	For reference: 2019 Total OHC (% OHC Respondents)
Required'	8%	9%	12%
Contributor**	66%	64%	65%
Bonus***	26%	27%	23%
(n)	2,712	1,616	2,773

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

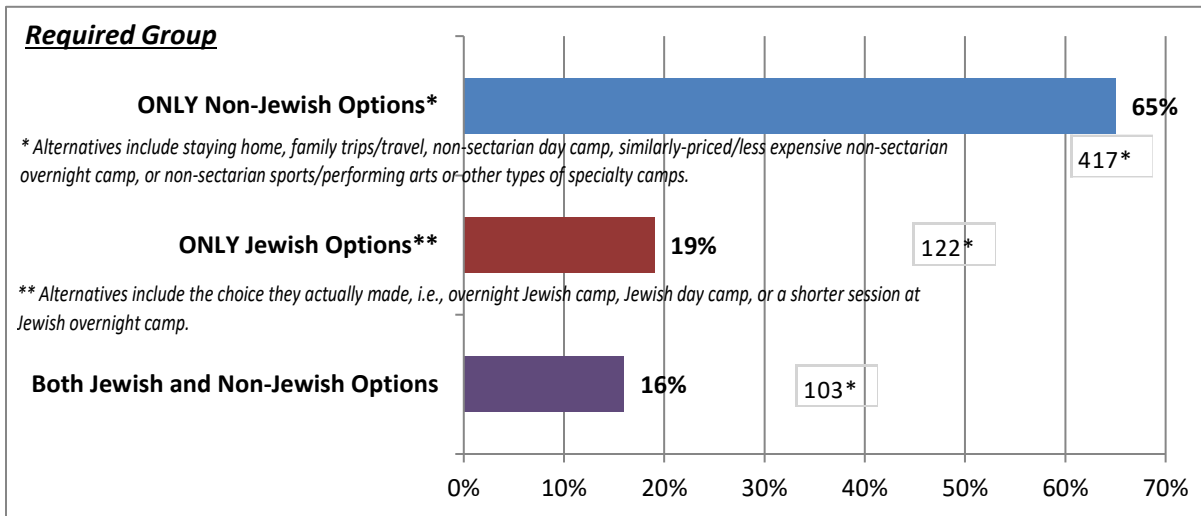
Total U.S	2022 Total	Required	Contributor	Bonus
Under \$100K	16%	51%	15%	8%
\$100 - \$149K	16	19	20	9
\$150 - \$199K	14	7	17	12
\$200 - \$299K	17	5	17	23
Over \$300K	11	3	10	21
Didn't Provide Income	25	14	22	27

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





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



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

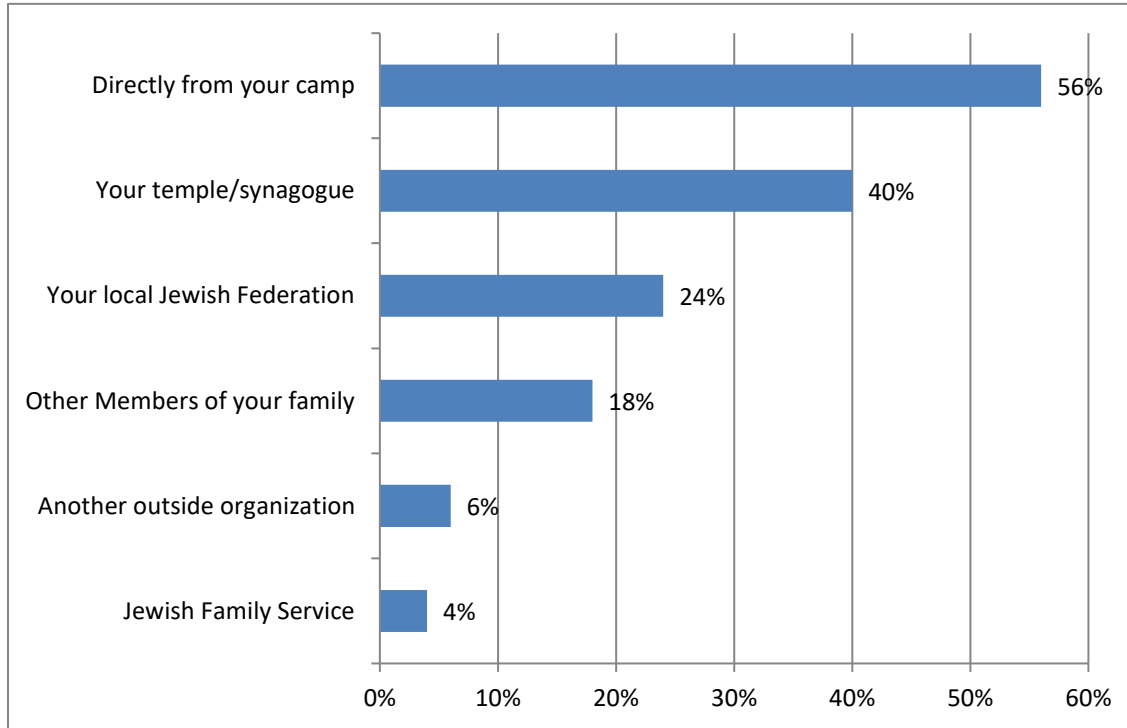
How influential were people/organizations below in your decision to send your child to overnight Jewish camp this summer?

	Friends	Family	Your Rabbi	Your Hebrew/ Religious School	Your local Jewish Federation	Youth Group	PJ Library	Other
5 (Extremely Influential)	41%	34%	9%	11%	5%	3%	7%	24%
4	21%	20%	8%	11%	7%	3%	9%	2%
3	13%	16%	13%	14%	12%	5%	16%	1%
2	6%	7%	8%	9%	10%	5%	12%	0%
1 (Not at all Influential)	14%	18%	41%	34%	44%	40%	37%	1%

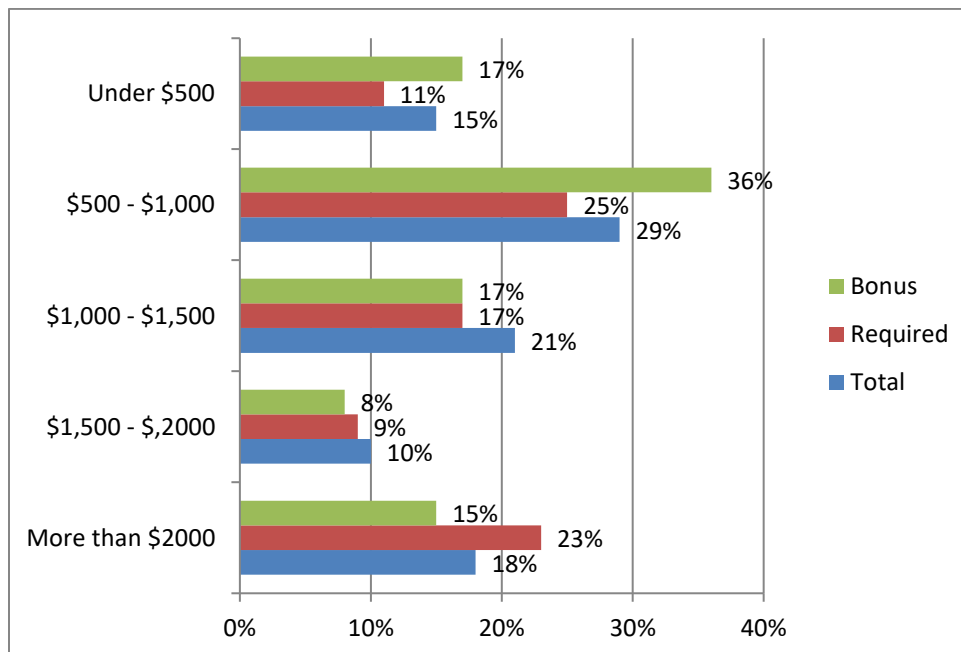
OHC grant as financial assistance:

- Among all parents who said they were less likely to have sent their kids to camp, nearly 95% cited cost and affordability as the barrier that OHC helped them to overcome.
- 28% 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 scholarship funding (not OHC incentive funding) was coming primarily from the camps (56%) or from their temple/synagogue (40%).

Where does additional funding come from:



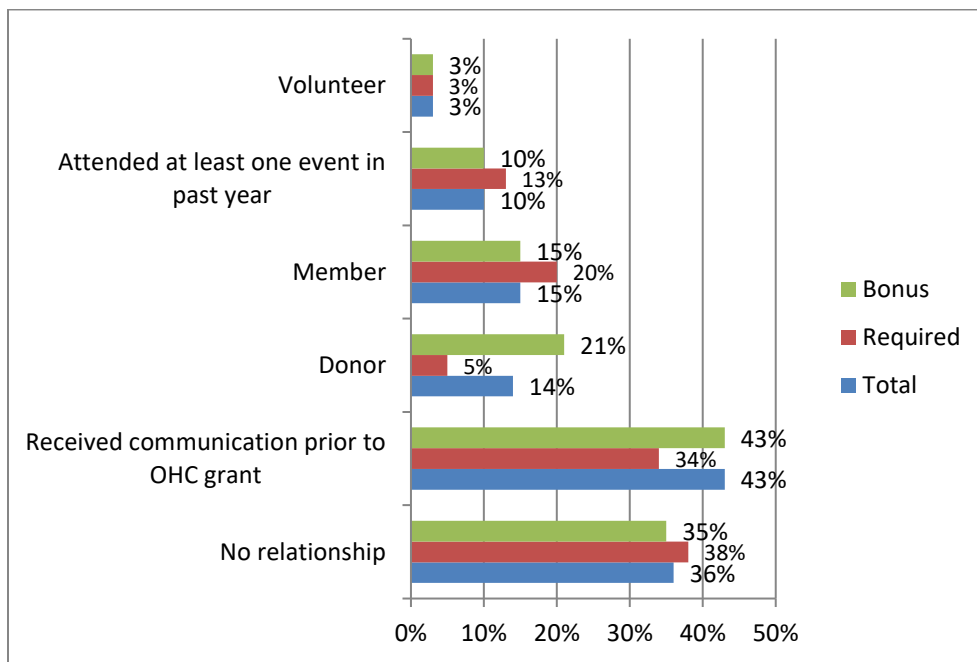
How much additional funding are recipients expecting to receive:



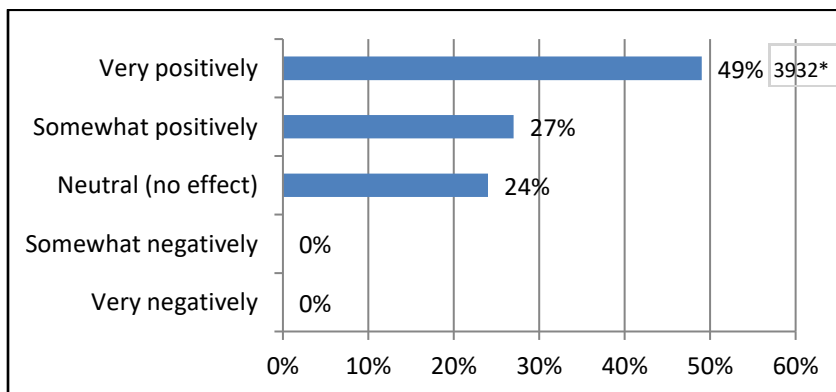
III. JEWISH ENGAGEMENT

- For the majority of families, OHC had the additional perceived benefit of creating closer ties to their Jewish community and/or their Federation.
 - 71% (or nearly 5,700 OHC families projected to the total OHC recipient group) are not currently members and/or donors of their sponsoring organizations, many with giving potential.
 - 49% (or nearly 4,000 OHC families projected to the total recipient group) believed the incentive "very positively" affected their family's connection to the overall Jewish community
 - 61% (or nearly 4,900 OHC families projected to the total recipient group) believed the incentive "very positively" affected their connection to the local Federation.
 - 73% (or nearly 5,900 OHC families projected to the total OHC recipient group) were more likely to support the sponsoring organization.

What is your current relationship with the organization?

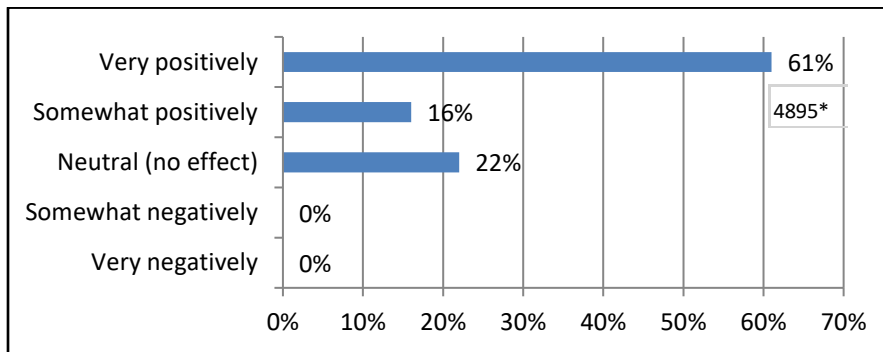


How did the OHC grant affect the family's connection to the overall Jewish community:

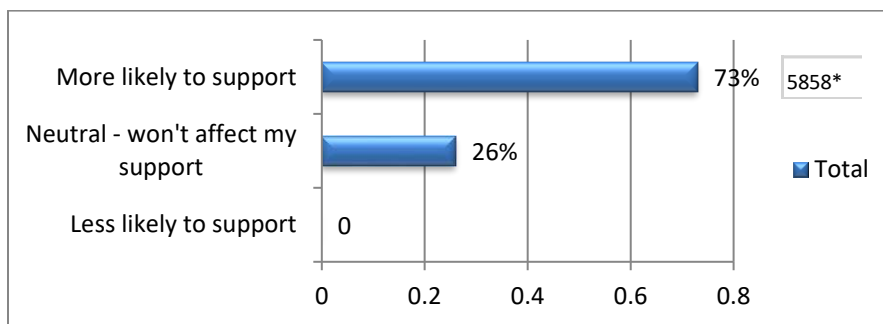


*Projected total based on research percentage applied to total North American OHC recipient number

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?

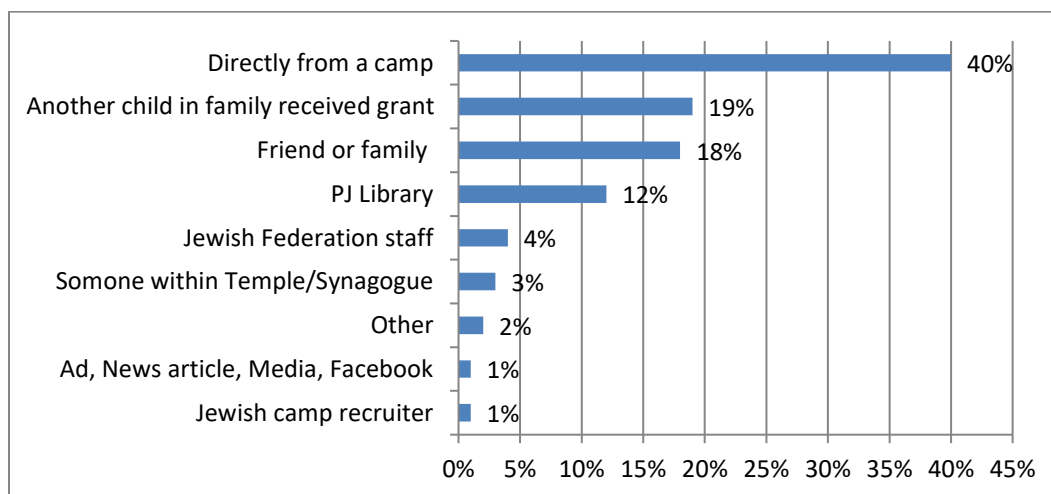


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IV. INCENTIVE AWARENESS AND THE APPLICATION PROCESS

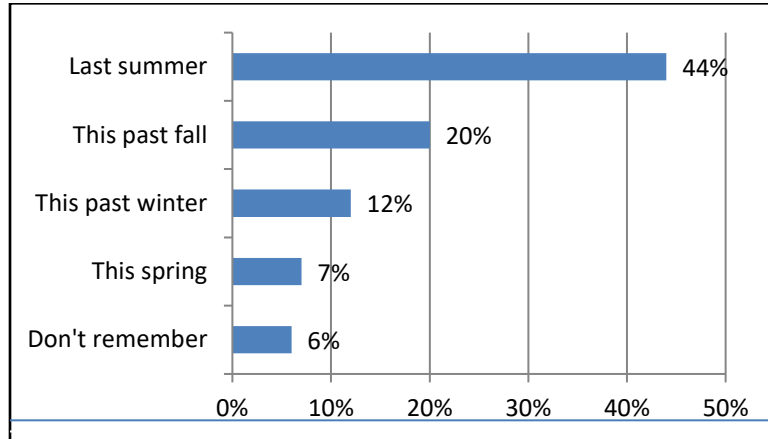
- Parents primarily hear about OHC from the camp and “buzz” from friends and family.
- Most recipients began their search for camp by talking to the camp where a family member attended or talking to the camp directly.
- 64% of 2022 OHC recipients started their camp search/summer planning at least 9 months 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?

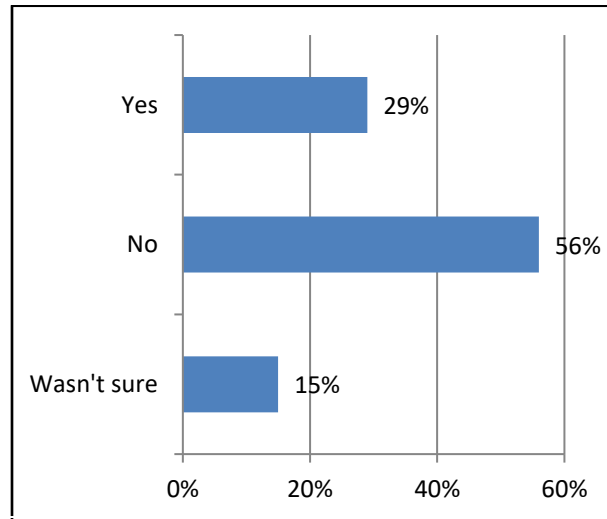


* Based on results from the total North American OHC recipient group

At what point did you begin specifically considering Jewish overnight camp for the summer of 2021 (True 2021 recipients only)



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



What was your experience when dealing with the following groups/organizations leading up to and through the One Happy Camper application process?

	Federation	Foundation for Jewish Camp	Your camp
5 (Excellent)	73%	69%	75%
4	17%	17%	18%
3	10%	14%	7%
2	0%	0%	0%
1 (Poor)	0%	0%	0%

Excludes "Not Applicable" responses

Appendix I - Scope of OHC Program since 2006

Summer	# of Partners	# Incentive Campers
2022	112	8,025
2021	105	9,725
2019	109	6,800
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 2022 OHC program

- | | |
|--|-----------------------------------|
| Ann Arbor | Montreal |
| Atlanta | Nashville |
| Boston | Nevada |
| Broward County | New Hampshire |
| Buffalo | New Haven |
| Calgary | Northern NJ |
| Central NY | Palm Springs |
| Charleston | Philadelphia |
| Chicago | Pittsburgh |
| Cincinnati* (does not participate in survey) | Portland |
| Cleveland | Rhode Island |
| Colorado | Richmond |
| Columbus | Rochester |
| Delaware | San Diego |
| El Paso | San Francisco (East Bay/West Bay) |
| Greater MetroWest NJ | Seattle |
| Greensboro | South Palm Beach |
| Hartford | Southern NJ |
| Heart of NJ | St. Louis |
| Indianapolis | St. Paul |
| Kansas City | Stamford |
| Los Angeles | Tidewater |
| Louisville | Virginial Peninsula |
| Milwaukee | Washington (DC/NOVA) |

In addition to these communities, PJ Library and 59 camps participated in the 2022 OHC program.

Appendix II - Response Rates by Participating Partners

	# Campers invited	# of survey responses	Response Rate
PJ Goes to Camp	1339	654	49%
JUF Chicago	505	192	38%
Union for Reform Judaism	503	211	42%
Jewish Federation of Greater Los Angeles	472	157	33%
Combined Jewish Philanthropies of Greater Boston	315	132	42%
Jewish Federation of Greater Atlanta	314	112	36%
Generations Fund/Federation CJA	262	101	39%
Jewish Community Federation and Endowment Fun (San Francisco, the Peninsula, Marin and Sonoma Counties - West Bay)	211	74	35%
National Ramah Commission	211	81	38%
Jewish Federation of Greater Washington (DC)	199	100	50%
Jewish Federation of Greater MetroWest NJ	178	53	30%
Jewish Federation of Northern New Jersey	142	44	31%
Jewish Community Federation and Endowment Fund (Alameda, Contra Costa, Napa and Solano Counties – East Bay)	133	55	41%
JewishCOLORADO	120	58	48%
Jewish Federation of Greater Philadelphia	104	41	39%
Jewish Federation of Greater Pittsburgh	77	30	39%
Jewish Federation of Greater Portland	72	30	42%
Jewish Federation of Greater Seattle	70	25	36%
Jewish Federation & Jewish Education Center of Cleveland	68	23	34%
Jewish Federation of St. Louis	67	31	46%
Jewish Federation of Broward County	67	23	34%
Jewish Federation of San Diego County	67	23	34%
The Jewish Federation of Greater Washington (NOVA)	56	27	48%
JewishColumbus	45	25	56%
Jewish Federation of South Palm Beach County	45	17	38%

Jewish Nevada	41	18	44%
Jewish Federation in the Heart of New Jersey	36	10	28%
Jewish Community of Louisville	31	8	26%
Jewish Federation of Greater Rochester	27	11	41%
Jewish Federation of Greater Hartford	25	11	44%
Jewish Federation of Southern New Jersey	22	12	55%
Jewish Federation of Greater New Haven	21	9	43%
Milwaukee Jewish Federation	20	7	35%
Jewish Federation of San Antonio	18	9	50%
Jewish Federation of Greater Indianapolis	17	10	59%
Greensboro Jewish Federation	15	6	40%
St. Paul Jewish Federation	15	8	53%
Jewish Federation of Nashville and Middle Tennessee	12	5	42%
United Jewish Federation of Stamford, New Canan & Darien	9	5	56%
Jewish Community Federation of Richmond	8	4	50%
Charleston Jewish Federation	8	4	50%
Jewish Federation of Greater Ann Arbor	7	5	71%
Tidewater Jewish Foundation	5	1	20%
Buffalo Jewish Federation	5	1	20%
Jewish Community of the Virginia Peninsula	5	3	60%
Jewish Alliance of Greater Rhode Island	4	1	25%
Jewish Federation of Greater El Paso	4	1	25%