

ONE HAPPY CAMPER[®]

NORTH AMERICAN SUMMARY 2022

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 2022 One Happy Camper Program (OHC) implemented by 112 partner organizations (local Jewish federations, foundations and camps) throughout North America. This past summer, 8025 children received first-time OHC grants, a decrease of 17% from 2021 but an increase of 16% from 2019. Not surprisingly, the number of grants in 2022 was lower than 2021, which included many 2020 campers who were not able to attend camp due to the pandemic.

The analysis of this year's program is based on survey research among **2712 OHC GRANT RECIPIENT** families (40%), a highly representative sample. This research has once again been supplemented, where appropriate, with data from the 2022 Camper Satisfaction Insights study (CSI), which included a total of 9,210 families from 81 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

As we noted in last year's summary, Covid changed our lives in ways too numerous to count. Similarly, the "Lost Camping Year" of 2020 changed the camping world in ways we are still trying to understand. We are continuing to see movement in some of the camper data in 2022, so we remain cautious about drawing conclusions regarding "trends". We cannot say yet if changes are short-term or if Covid has modified behaviors/actions so that changes become more long-term. We will continue to track this.

Again in 2022, we saw differences in many key demographics compared to historical trends, which we will continue to monitor. Most noteworthy is the continuing decline in the percentage of campers aged 13+ attending camp. While we are not sure regarding the reason(s) for this dramatic change, we still believe 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 continuing decline we saw among this group. We will monitor this in future summers to see if this trend continues or reverses over time.

In 2022, we also saw a significant increase in the number of unaffiliated OHC families. This number climbed from 20% in 2019 and 2021 to 30% in 2022. This is not surprising given the growing number of unaffiliated Jewish families, but we will continue to monitor this trend in future summers as well.

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>.*

2022: KEY FINDINGS

Similar to 2021, the impact of the 2022 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 2022, **8025 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:

	2022 Total OHC (% OHC Respondents)	"True" 2021 OHC (% OHC Respondents)	For reference: 2019 Total OHC (% OHC Respondents)
Required*	8%	9%	12%
Contributor**	66%	64%	65%
Bonus***	26%	27%	23%
(n)	2712	1,616	2,733

* "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.

Note: We have used "True 2021" as a more "apples to apples" comparison to 2022 results. "True 2021" campers were those who did NOT plan to attend camp in 2020 (when the pandemic cancelled all camp activity) and is a subset of total 2021 results. For reference, this subset was about 52% of total 2021 OHC respondents (3,110)..

Based on this segmentation, we believe that **41% 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 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.

Consistent with previous years, OHC is helping sponsoring organizations reach *more* deeply into the Jewish community.

	2022 Required	2022 Bonus	2022 OHC Total		For reference: "True 2021" OHC	For reference: 2019 Total OHC
Synagogue-unaffiliated	32%	29%	30%		22%	20%
Interfaith	18%	15%	19%		17%	18%
Parents income under \$100K	51%	8%	16%		21%	28%
At least one non-American parent	19%	20%	19%		21%	22%
OHC Camper Age: 10 or under	81%	90%	88%		78%	57%
13 or older	3%	1%	2%		5%	19%

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. 35% of all OHC respondents did not have a parent who attended an overnight Jewish summer camp.

II. ENGAGEMENT/CONNECTIONS

One Happy Camper grants are reaching campers and families who are less engaged in Jewish life. For 53% 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.*

- 71% of OHC respondents are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 61% of OHC respondents believed the incentive "very positively" affected their family's connection to the sponsoring organization.
- 49% of OHC respondents believed the incentive "very positively" affected their family's connection to the overall Jewish community.
- 73% 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	91%	92%
Likelihood to Recommend	91%	93%
Likelihood to Return to Camp	84%	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	94%	94%
Impact on your child's Jewish identity	87%	88%

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

40% of Total OHC recipients heard about the incentive from their camps and 18% from friends and family. Only 3% of recipients heard about the incentive from someone in their temple or synagogue; this is down from 17% in 2019, consistent with the significant increase seen in the percentage of unaffiliated OHC families. However, it is still 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. 64% of OHC recipients started their camp search/summer planning at least 9 months in advance, while 44% began thinking more than a year ahead. These numbers have returned closer to 2019 levels.

Nearly 80% 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.

2712 surveys were completed out of a possible 6766 North American OHC recipients who were sent the survey, for a response rate of 40%, -13% points lower than the 53% response rate in 2021. 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.