

North American Impact of One Happy Camper Program (OHC)

This report evaluates the impact of the 2016 One Happy Camper Program (OHC) implemented by 101 partner organizations (local Jewish federations, foundations and camps) throughout North America. This past summer, 7,100 children received first-time OHC grants, down slightly from 2015.

The analysis of this year's program is based on survey research among 3,181 recipient families, a highly representative sample that includes 58% of invited OHC recipients. This research has once again been supplemented, where appropriate, with data from the 2016 Camper Satisfaction Insights study (CSI), which included a total of 8,941 families from 67 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.

While there has been an increase in camp participation in certain regions, there is still room for tremendous growth in the numbers of Jewish camp-aged children in North America attending one of the 155+ nonprofit Jewish overnight camps across the continent. As such, the OHC incentive program was created in order 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>.

2016: Key Findings

Similar to 2015, the impact of the 2016 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 2016, 7,100 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, recipients 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 recipient families they represent are:

| | 2016 Total OHC (% OHC Recipients) | 2015 Total OHC (% OHC Recipients) | For reference: 2009 Total OHC (% OHC Recipients) |
|---------------|--------------------------------------|--------------------------------------|--|
| Required* | 1,136 (16%) | 1,168 (16%) | 1,426 (23%) |
| Contributor** | 4,544 (64%) | 4,745 (65%) | 3,658 (59%) |
| Bonus*** | 1,420 (20%) | 1,387 (19%) | 1,116 (18%) |
| TOTAL | 7,100 | 7,300 | 6,200 |

(Note: Based on research percentages applied to North American OHC recipient numbers 2010 - 2014 results are not shown, but are comparable to 2015 and 2016 results)

- * "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 48% (or 3,408) of the OHC recipients 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 recipients said that Jewish camp was always the plan. This means that for **88% of recipients**, Jewish camp was one of several options they were considering from among an array of **mostly secular** alternatives. 59% of all OHC recipients were considering only secular, non-Jewish activities or programs, including 28% who would have simply stayed home.

Another striking finding - even among higher-income respondents (\$150,000 or more), 55% 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:
 - More than one-fourth are unaffiliated with a Synagogue.
 - Nearly one-third are from an interfaith family.
 - More than 60% have income under \$100K.
 - More than one-third have at least one non-American parent.
 - Nearly 30% have a first-time camper who was aged 13 or older.

| | 2016 Required | 2016 Bonus | 2016 OHC Total | 2015 Required | 2015 Bonus | 2015 OHC Total |
|----------------------------------|------------------|---------------|-------------------|------------------|---------------|-------------------|
| Synagogue-unaffiliated | 28% | 13% | 19% | 29% | 10% | 18% |
| Interfaith | 32% | 15% | 22% | 29% | 14% | 23% |
| Parents income under \$100K | 62% | 13% | 30% | 62% | 13% | 32% |
| At least one non-American parent | 36% | 13% | 21% | 35% | 11% | 21% |
| OHC Camper Age: 10 or under | 38% | 70% | 57% | 36% | 69% | 53% |
| 13 or older | 28% | 9% | 16% | 32% | 10% | 18% |

- 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. **35% of all OHC recipients did not have a parent who attended an overnight Jewish summer camp.** (This is even more pronounced among the Required segment where **50% did not have parents who attended camp.**)

II. Engagement/Connections

We learned from research in 2012 that nearly 40% of 2nd year incentive recipients increased their year-round Jewish activity/ engagement. 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.*

- 62% of OHC recipients are not currently members and/or donors of their sponsoring organizations, many with giving potential.
- 63% of OHC recipients believed the incentive "very positively" affected their family's connection to the sponsoring organization.
- 57% of OHC recipients believed the incentive "very positively" affected their family's connection to the overall Jewish community.
- 74% of OHC recipients 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. 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% | 91% |
| Likelihood to Recommend | 95% | 94% |
| Likelihood to Return to Camp | 87% | 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 | 96% | 96% |
| Increases awareness of your child's Jewish identity and/or their activity/participation in synagogue or in our local Jewish community. | 84% | 86% |

Based on "5"/ "4" ratings on a 5 point scale

Findings from the 2012 OHC Retention research support the CSI data. The results were overwhelmingly favorable, with return rates in the summer following the first-year incentive exceeding 80%.

- The vast majority (82%) of OHC recipients return to camp for a second summer and retention actually grows for the third summer as 90% of second-year campers return.
- 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 the Foundation for Jewish Camp

Additional Findings - Marketing and Recruitment

42% of OHC recipients heard about the incentive from their camps, with another 22% hearing about it from friends and family and 9% from someone in their synagogue. This reinforces the importance that every Jewish professional within the community (synagogues, JCC's, Jewish Family Services, PJ Library, the camps, other youth programs, etc.) are aware of the local OHC program and the myriad of Jewish camp opportunities.

58% of recipients started their camp search/summer planning at least 9 months in advance. 26% began thinking more than a year ahead. This reinforces the need to start recruitment early.

Nearly 25% of OHC families start their search with the camps - either via their website or contacting the camp directly. This confirms the importance of camp's maintaining 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.
- 3,181 surveys were completed out of a possible 5,478 North American OHC recipients who were sent the survey, for a response rate of 58%, comparable to the 59% response rate in 2015. 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.
- There continues to be a very positive appraisal of the online application process. Similar to 2011-2015, 94% gave highly favorable ratings to the application process and most had no suggestions for improvement.
- Additional findings can be found in the Detailed Findings summary. Contact the Foundation for Jewish Camp for this information.