

Understanding The Needs Of Jewish Parents In Greater Boston To More Effectively Market Day Schools

Executive Summary Report

Prepared For: **The Day School Advocacy Forum**

LIEBERMAN RESEARCH WORLDWIDE

The Science Of Research. The Art Of Problem Solving.

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- 1. DAF seeks to boost enrollment in Greater Boston Jewish Day Schools by 10%. Market analysis suggests that this is an achievable goal, with segmentation analysis targeting the groups with the greatest opportunity.**
- 2. Day School marketing and advocacy should focus on the quality of math, science and English—important attributes which are not perceived as being comparable to other private schools. Day schools should also reinforce their strengths—ethics and value, low student/teacher ratio and positive peer groups. Other school attributes are less important in the school decision process, including teaching of Hebrew language, Jewish culture and practices, and athletics.**
- 3. Other strategies are recommended for marketing to parents, including:**
 - Building on word-of-mouth, which is clearly the most powerful marketing tool**
 - Making greater use of under-utilized sources of influence such as Rabbis and pre-school staff**
 - Reaching out to potentially underserved groups such as Reform or Russian families**

Executive Summary

In pursuing their goal of increasing Jewish Day School enrollment in Greater Boston, DAF must build on the many strengths of the Jewish school system and strive to overcome many of the perceived barriers.

- Overall, Jewish Day Schools are perceived as very different from other types of schools. In general, Jewish Day Schools excel at offering Hebrew language and Jewish culture education, providing a core of ethics and values, having low student-teacher ratios, and giving a sense of community. These schools are perceived to be weak for their quality of secular courses, as well as a lack of diversity, affordability, and special needs programs. In contrast, private schools stand out for the excellence of their academics, while public schools are known for affordability and convenience.

An overview of the total market presents several areas of opportunity:

- The needs of Reform parents may be particularly under-served by the Jewish school system. Reform parents, as well as Other/Unaffiliated parents, are rarely reached by Jewish Day School marketing initiatives.
- DAF could also consider developing programs to reach out to Russian parents and improve their satisfaction with the Jewish Day School system. Russian and Israeli parents both feel that Jewish education is very important, but Russian parents are currently much less satisfied with their child's Jewish education. The qualitative research from this study suggests that Russian parents may feel that the American school system is inferior to the Russian system, and furthermore, these parents may be less knowledgeable about their Jewish background if their families were not able to practice in Russia. To reach these parents, DAF must make Russian families feel comfortable in the school system, and convince them of the quality of the education available.
- Word-of-mouth is clearly the most powerful marketing tool, as parents frequently consult friends, other parents and alumni. Schools can take advantage of this by introducing prospects to other parents or alumni during the consideration process.
- Two key groups are potentially under-utilized in reaching out to parents. Only one-quarter of parents say their child's pre-school staff was involved in their school selection process, and less than 1 in 10 parents say their Rabbi or synagogue leader was involved. In particular, Rabbis tend to be useful sources of influence for Orthodox families, but are rarely used by parents of other denominations.

Executive Summary (continued)

A segmentation analysis can be used for more strategic targeting of parents and their specific needs. Based on the information the strategy is to focus on the first two segments of the community (Believers & Best of Both Worlds). This analysis yields the following five distinct groups of Jewish parents in the Greater Boston area:

Believers (14% of parents): place the most importance on Jewish culture and Hebrew language education. They have a strong Jewish identity, and want their children to develop one as well. Their income is slightly below average, and they think financial aid is important, though they are willing to make sacrifices for their children's education. The Believers are heavily skewed to Orthodox, with a high proportion of Conservatives as well. Overall, these parents are strong supporters of Jewish Day Schools, and could be used as advocates to reach out to other parents. Messaging to this group could relate to the value of a Hebrew education, though these parents already believe that Jewish schools perform well in this area. Despite their support of Jewish Day Schools, Believers still see math, science and English as critical weaknesses, and could be reassured of the schools' quality of secular courses.

Best of Both Worlds/BOBs (18% of parents): want their children to have a Jewish education, but are not willing to sacrifice the quality of other programs. They are generally supportive of Jewish Day Schools, but not as much as the Believers, as they see math, science and English as critical weaknesses. The BOBs tend to skew toward the Conservative denomination. DAF should seek to boost the BOBs' consideration of Jewish Day Schools to the levels seen among the Believers, as the BOBs are the most targettable group for new growth. Messaging related to quality of secular education will resonate strongly with this group.

Jewish Public Schools (16% of parents): favor “public school” benefits such as affordability, convenient transportation and special needs, though they still value building Jewish identities for their children. They tend to rely on other means such as after hours school or Jewish camp for their children’s Jewish education. The Jewish Public School segment has a slight skew toward Conservatives. The Jewish Public School parents may be attracted by financial aid programs, though Jewish Day Schools must also offer these parents the convenience of public schools in order to win them over.

Alternative Communities/A-COMs (20% of parents): seek a warm school environment, with diversity, reasonable hours, and a sense of community. These parents are not very likely to consider Jewish Day Schools, and are therefore very hard to attract. This segment skews toward Reform, Reconstructionist and Other/Unaffiliated denominations. Messaging for these parents should emphasize the nurturing environments of Jewish Day Schools – the ethics and values, the sense of community, and the positive peer groups.

Secular Academic Trackers/SATs (32% of parents): are most concerned with the quality of academics, so that their children can get into the best colleges. This group does show a strong economic potential, due to the large segment size and a high average household income, though these parents are currently not receptive to Jewish schools. The SATs skew to the Reform denomination. Like the A-COMs, these parents present a very challenging segment for Jewish Day Schools. However, they should be addressed with the same messaging as the BOBs, via the quality of secular education.

Recommendations for DAF

- In order to move toward a more strategic marketing approach, DAF should seek to have its messaging and communications directly address the needs of the high potential segment groups. A key group for DAF are the Believers, as DAF can continue to build on their strong levels of support for Jewish Day Schools, and leverage them as advocates for other parents. However, the greatest potential for new growth lies with the BOBs, and DAF should work to build their consideration to the levels of those seen among the Believers.
- If DAF seeks to develop a single mass marketing campaign, then the message should likely focus on the quality of math, science and English courses. This area is perceived to be a critical weakness of Jewish Day Schools, and a major strength of private schools. Furthermore, this message will meet the needs of the priority segments, the Believers and the BOBs. It may also be appealing to the SATs, who are currently less receptive to Jewish Day Schools, but are economically attractive. At the same time it would be advantageous to reinforce the strengths of Day Schools; ethics positive peer groups and student/teacher ratios. Other school attributes are less important in the school decision process, including teaching of Hebrew language, Jewish culture and practices, and athletics. While Jewish Day Schools still needs to compete strongly in these areas, they may be “taken for granted” by parents, and are not strong factors in their consideration.
- If, on the other hand, DAF wants to more directly address the needs of individual parents, then this can be accomplished by classifying parents into segments during the admissions or application process. By understanding a parent’s segment membership, an Admissions Director can provide information directly related to the specific needs and concerns of the parent, whether they relate to quality of academics, financial aid, Jewish culture, or a sense of community.
- Furthermore, the research points to several opportunities where DAF can develop programs or initiatives to help market Jewish Day Schools to parents. Rabbis and pre-school staff may prove to be sources of influence. Word-of-mouth channels are almost universally used in the school decision process, so schools can continue to utilize support from other parents, alumni, or members of the community. School websites could be improved and encouraged, as private schools currently leverage the Web more strongly than Jewish schools. Finally, in addition to targeting parents by segment, DAF may want to develop initiatives to make Reform families feel more welcome in the Jewish Day School system, as these parents are currently less receptive to Jewish schools.

Methodology

A total of 526 telephone interviews were conducted in April - May, 2004 with parents in Jewish households across the Greater Boston area. During the interviews, these parents were asked detailed questions about their attitudes and beliefs regarding education and the school enrollment decision process. The data from these telephone interviews were used to create a segmentation solution that groups parents with similar beliefs and attitudes into distinct, targettable groups. These segments will be used to provide guidance for future marketing and messaging strategies through better targeting and a greater understanding of the school consideration process.

Respondent Qualifications

- Parent or guardian of children between pre-school and the ninth grade.
- Primary or shared decision-maker regarding where to send children to school.
- Member of a Jewish household.
- Reside within the Greater Boston area.

Sample Details

- 526 random telephone interviews.
- “Booster” sample with Orthodox households to ensure representation from this group.
- Sample drawn from purchased sample lists (compiled by Jewish last name) and the CJP donor list.

Methodology (continued)

The final results were weighted by denomination to ensure that the results represent the population of Jewish parents in Greater Boston. Furthermore, additional weights were added to ensure that the CJP sample resembled the random sample in terms of religiosity, and to ensure that each child in the household would be represented in the data.

Weighting Details

- Three levels of weighting were applied to this study:
 - Data from the CJP sample were weighted to match the data from the purchased sample by frequency of attending synagogue within each denomination.
 - Data were also weighted to reflect the Jewish denomination distribution of Greater Boston, as measured in the CJP 1995 Demographic Study.
 - Details were asked about each child in the household, to a maximum of 3 children. Additional weights were applied for households that included more than 3 children, to account for those children that are not reflected in the data.

Reader's Note

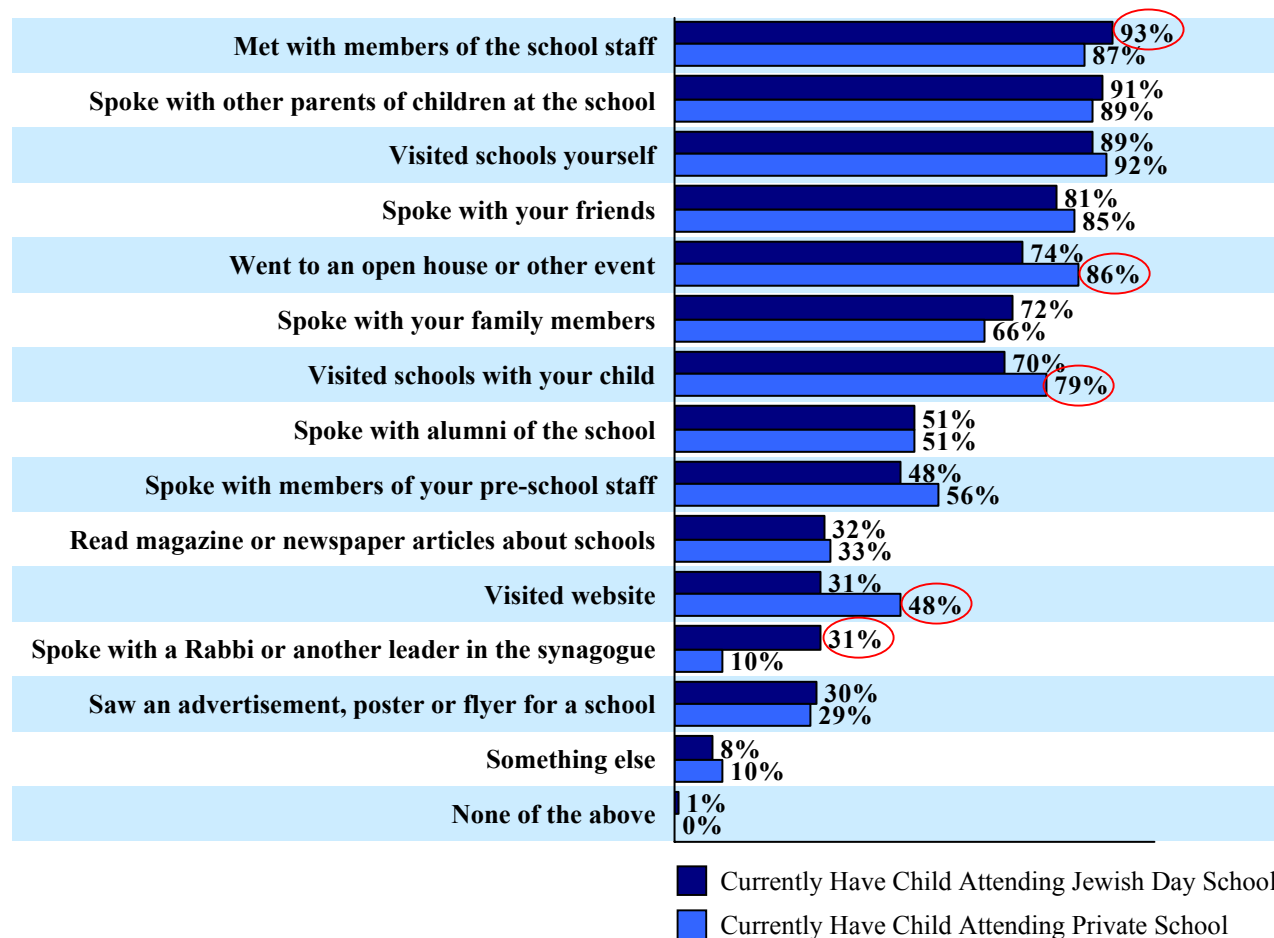
- As detailed above, the CJP sample was weighted to match the purchased sample by frequency of attending synagogue within each denomination, in order to balance the two samples as much as possible by their levels of affiliation. However, the Reader should still be cautioned that more affiliated parents may be more likely to participate in this research, causing a bias to toward the affiliated. Therefore some data within this study may not fully reflect the entire Jewish population of Greater Boston and could underestimate the potential market.

Perceived Performance of Jewish Day Schools In The Educational Market

Jewish parents are likely to follow very similar procedures when enrolling their child at a Jewish Day School versus a private school. Parents who have chosen a private school for their child are slightly more likely to have gone to an open house, visited a school with their child, or visited a website for information.

ACTIVITIES PERFORMED TO HELP CHOOSE A SCHOOL (WHEN ENROLLED CHILD AT CURRENT SCHOOL)

Jewish Day School Versus Private School Comparison



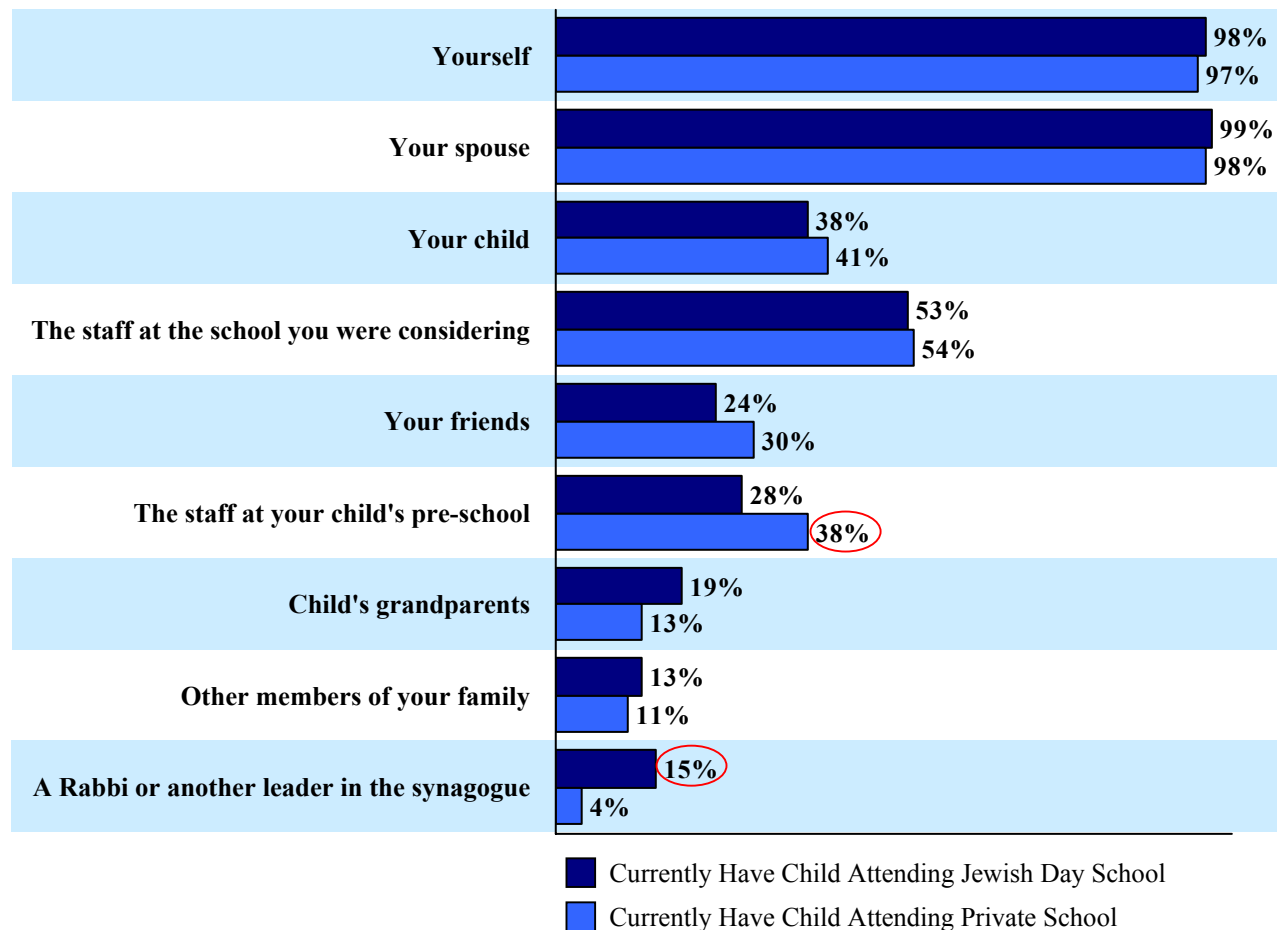
Q.6: Thinking back to when you enrolled your (child/children) in (his/her/their) current school, which of the following activities did you do to help you choose a school?

○ = significantly different at 95% confidence interval.

Jewish parents tend to involve the same parties in their school decision process whether they choose a Jewish Day School or private school for their children. Parents who have enrolled their children at a private school are more likely to have involved pre-school staff in the process.

INVOLVEMENT OF KEY PARTIES IN SCHOOL DECISION – VERY/SOMEWHAT INVOLVED

Jewish Day School Versus Private School Comparison



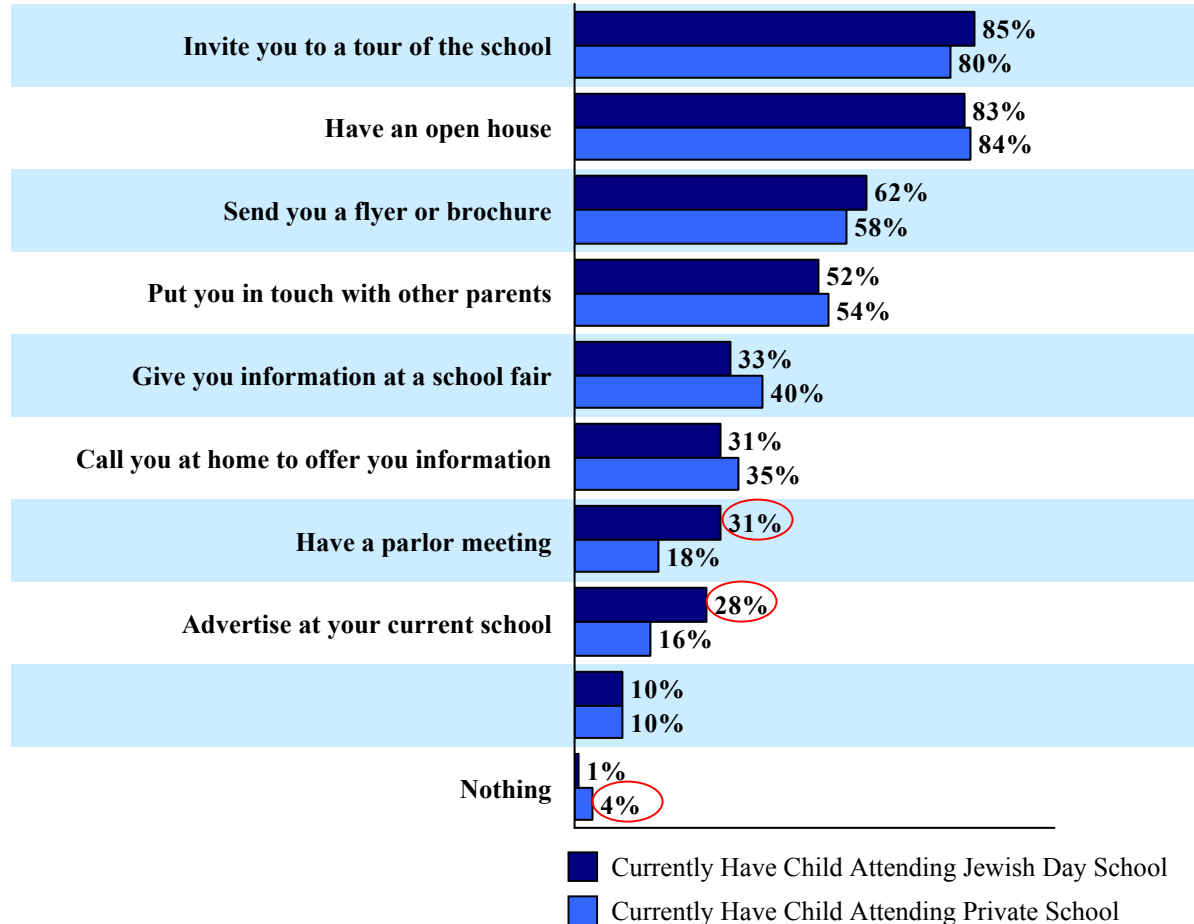
Q.7: How involved were the following people in the final decision to choose a school for your (child/children)?

○ = significantly different at 95% confidence interval.

Parents tend to encounter similar out-reach initiatives from Jewish Day Schools and other private schools. Parents with children currently at Jewish Day Schools were more likely to have been invited to parlor meetings, or seen advertising at their previous school.

ACTIVITIES PERFORMED BY SCHOOL TO REACH OUT TO PARENTS

Jewish Day School Versus Private School Comparison



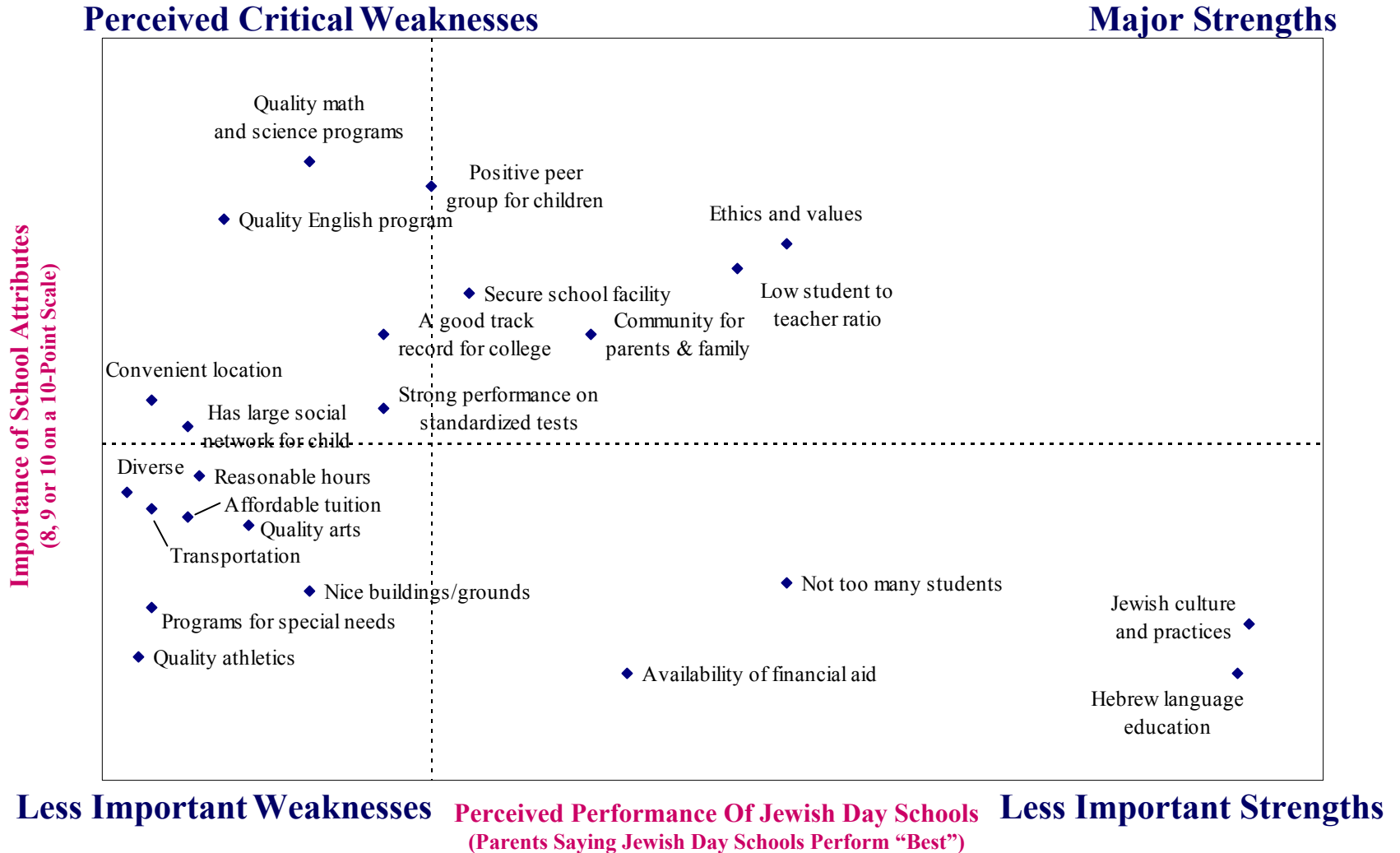
Q.7b: Thinking about when you chose which [school/schools] your [child/children] would attend, what did these schools do to reach out to you and make you interested in them?

Note: Circles indicate significant differences at the 95% confidence level.

The key strengths of Jewish Day Schools relate to the sense of “community” the schools provide – including ethics and values, positive peer groups, low student to teacher ratios, feelings of security, and community for parents and family. However, parents may feel that Jewish Day Schools under-perform on such critical areas as math, science and English programs, good track records for college, and standardized test performance.

QUADRANT ANALYSIS – JEWISH DAY SCHOOLS

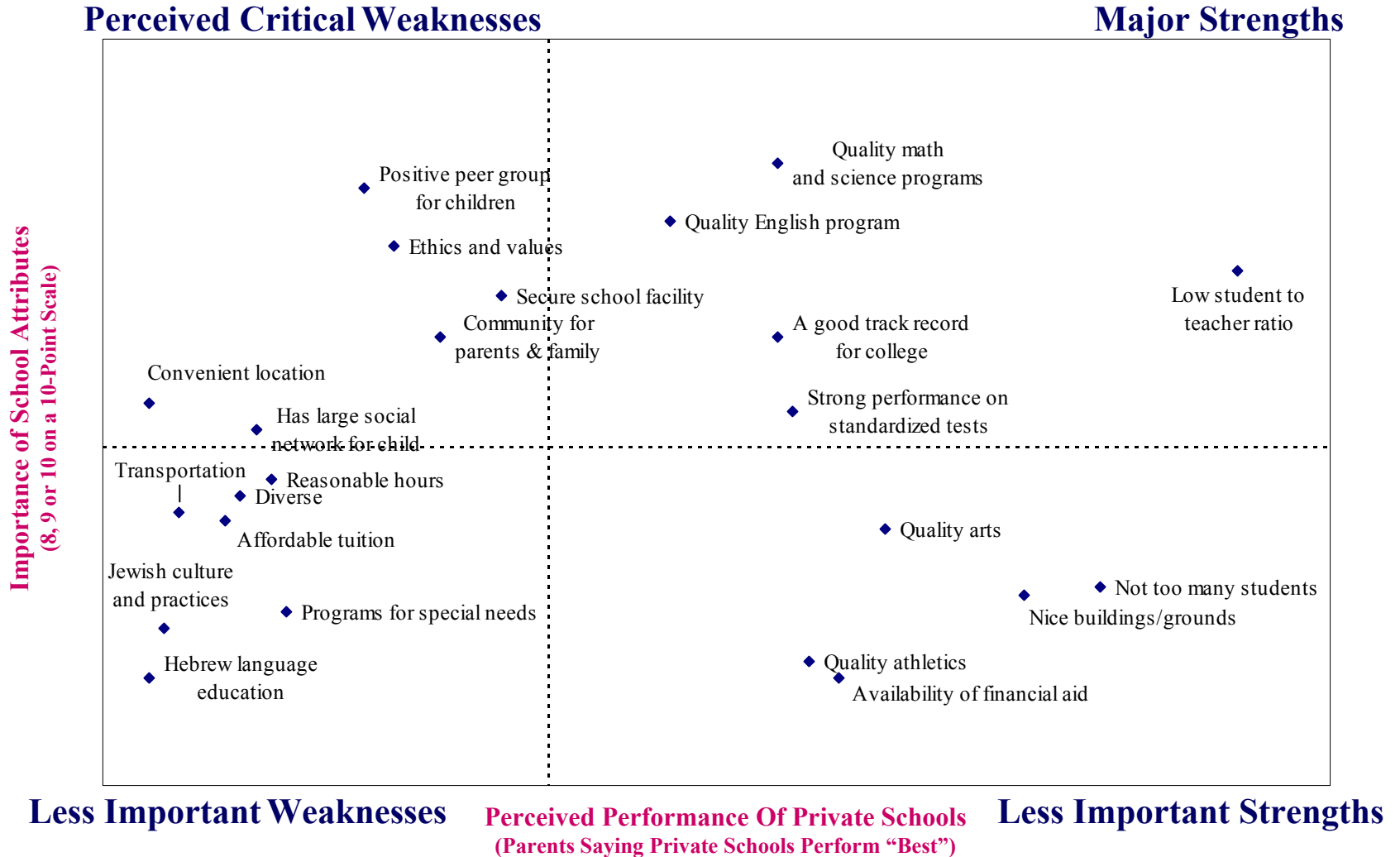
Importance Of School Attribute Vs. Perceived Jewish Day School Performance



Private schools have very different strengths and weaknesses, as compared to Jewish Day Schools. Private schools excel at many quality of education criteria, including math, science and English programs, college track records, and standardized test performance. However, these schools are not as strong at providing ethics and values, positive peer groups or a sense of community.

QUADRANT ANALYSIS – PRIVATE SCHOOLS

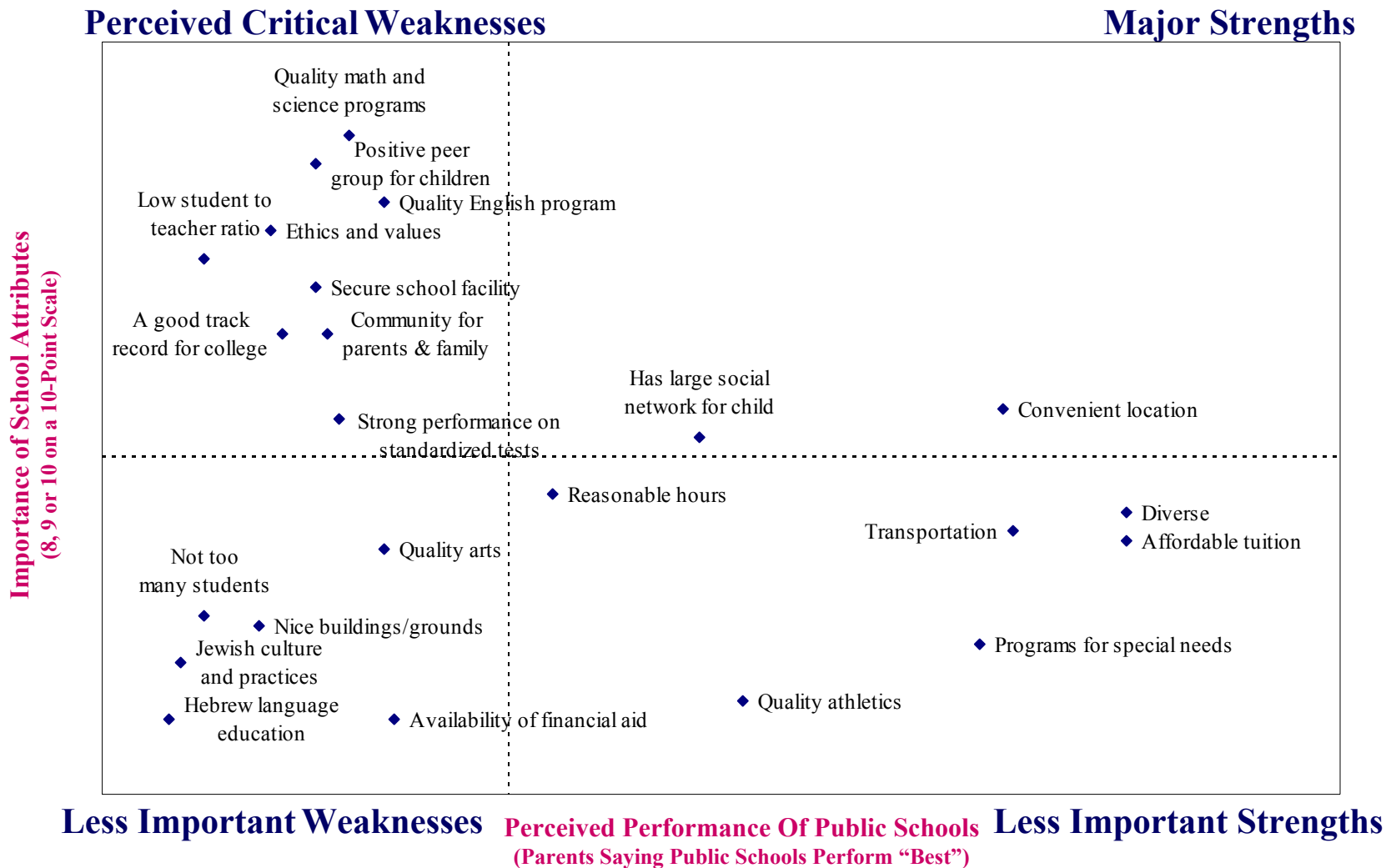
Importance Of School Attribute Vs. Perceived Private School Performance



Public schools excel at providing convenient locations and large social networks. They also perform well for offering diversity, affordability, transportation and special needs, though these areas are not seen as critically important to most parents. Public schools are weak in such key areas as quality math, science and English programs, positive peer groups, ethics and values, and student-teacher ratios.

QUADRANT ANALYSIS – PUBLIC SCHOOLS

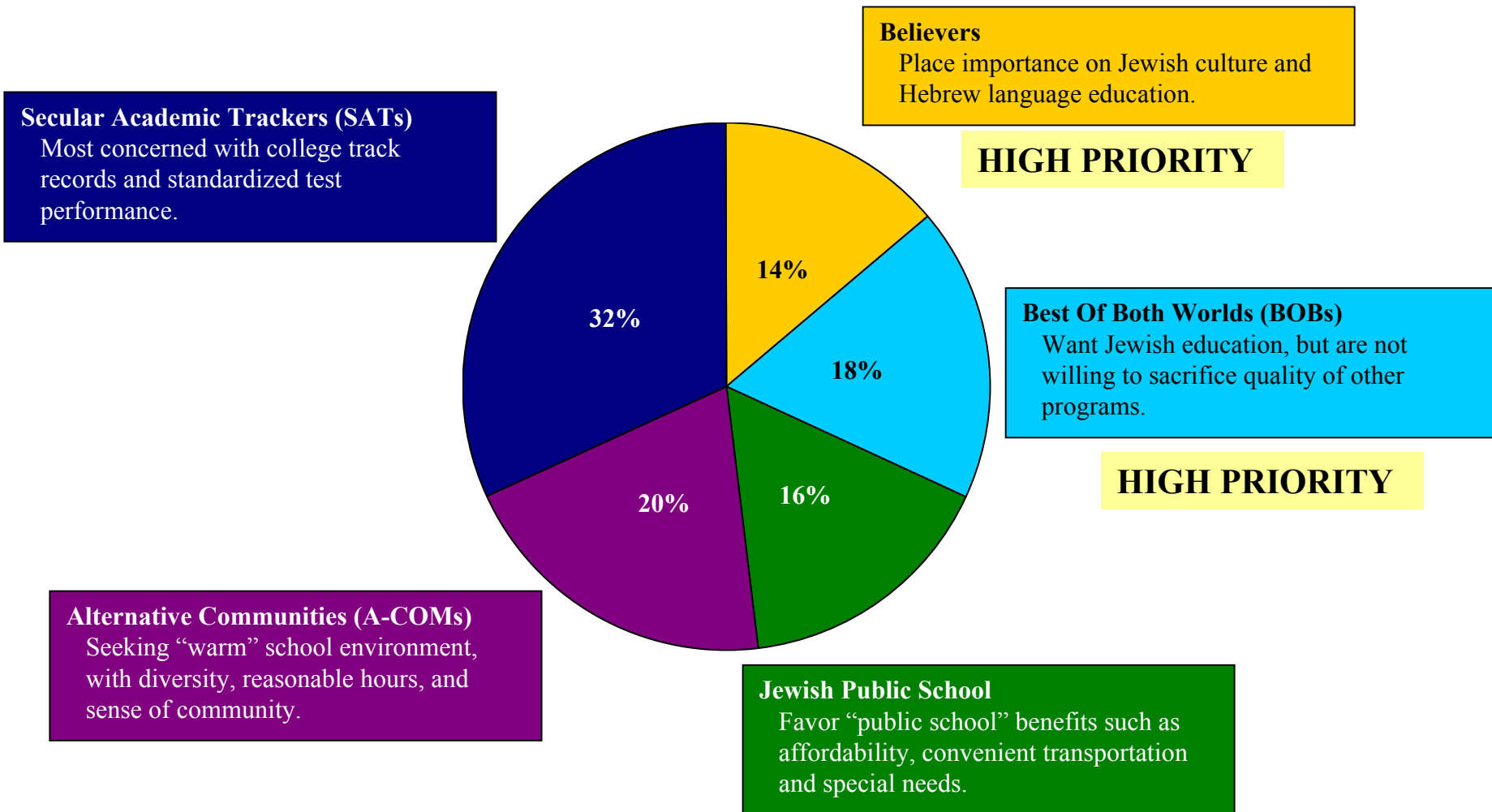
Importance Of School Attribute Vs. Perceived Public School Performance



Segment Profiles

The Jewish parent population in Boston can be segmented into 5 key groups, each with its own unique needs and attitudes toward education and religion. As outlined in this report, the greatest priorities are with the Believers and BOB segments.

SEGMENT DISTRIBUTION



Segment 1 - Believers

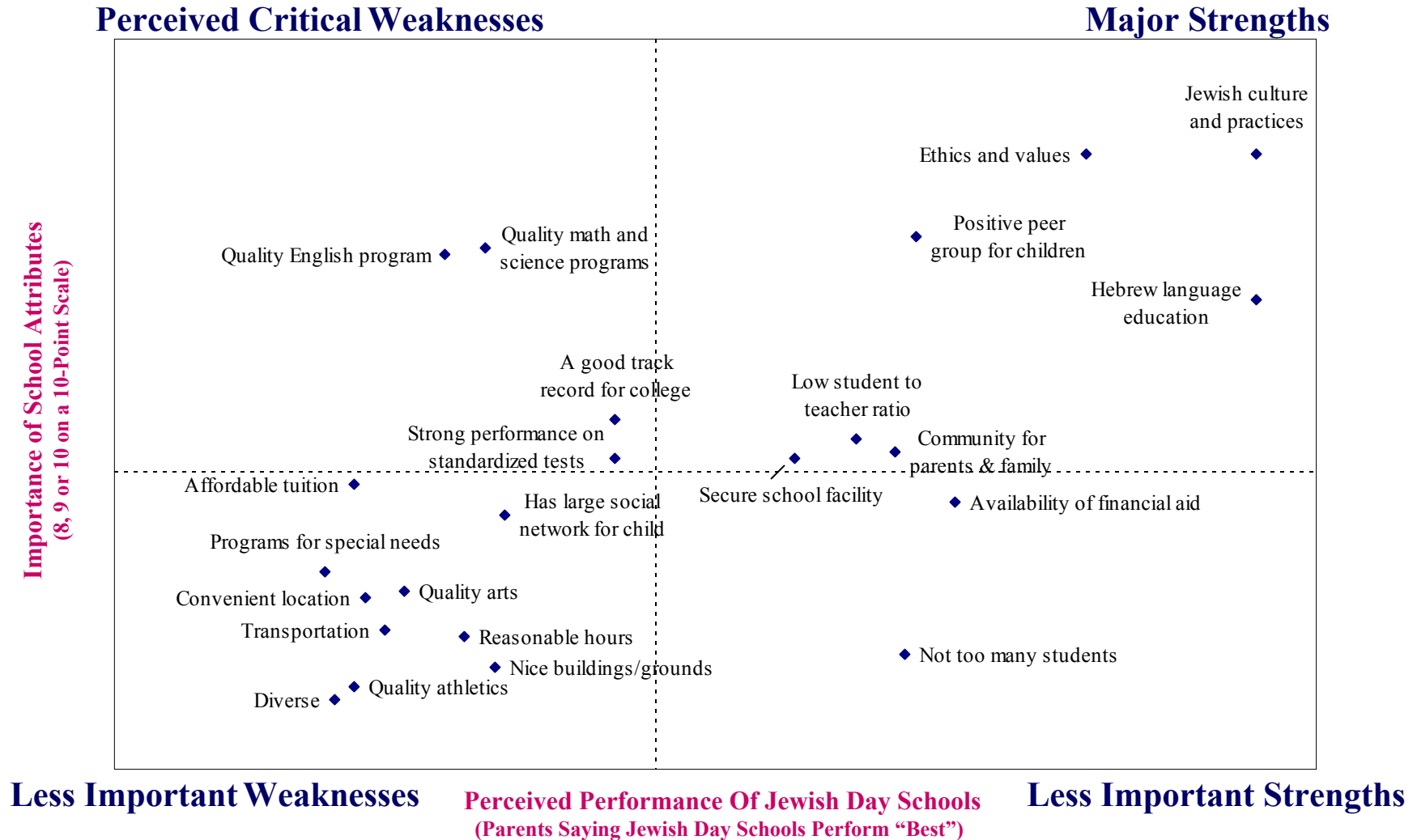
SEGMENTS AT A GLANCE

	Believers	Best Of Both Worlds	Jewish Public School	Alternative Communities	Secular Academic Trackers
Segment Size	14%	18%	16%	20%	32%
Most Important Attributes When Choosing School	<ul style="list-style-type: none"> •Ethics and values •Jewish culture/practices •Hebrew language 	<ul style="list-style-type: none"> •Jewish culture/practices •Not too many students •English •Math and science 	<ul style="list-style-type: none"> •Affordable tuition •Convenient transportation •Special needs •Financial aid 	<ul style="list-style-type: none"> •Reasonable hours •Diversity •Community for family •Not too many students 	<ul style="list-style-type: none"> •Performance on standardized tests •College track record •Convenient location
Perceived Critical Strengths of Jewish Day Schools	<ul style="list-style-type: none"> •Jewish culture/practices •Ethics and values •Hebrew language •Positive peer group •Student-teacher ratios •Community for family •Secure school facility 	<ul style="list-style-type: none"> •Ethics and values •Student-teacher ratios •Community for family •Positive peer group •Secure school facility •College track record 	<ul style="list-style-type: none"> •Student-teacher ratios •Ethics and values 	<ul style="list-style-type: none"> •Ethics and values •Student-teacher ratios •Community for family •Secure facility •Not too many students 	<ul style="list-style-type: none"> •Student-teacher ratios •Ethics and values •Community for family
Perceived Critical Weaknesses of Jewish Day Schools	<ul style="list-style-type: none"> •English •Math and science •College track records •Standardized test performance 	<ul style="list-style-type: none"> •English •Math and science 	<ul style="list-style-type: none"> •English •Math and science •Affordable tuition •Transportation •Convenient location •Positive peer group •College track record •Special needs •Large social network 	<ul style="list-style-type: none"> •Positive peer group •Reasonable hours •Diversity •Math and science •English •Convenient location •Large social network 	<ul style="list-style-type: none"> •College track record •Math and science •English program •Convenient location •Large social network •Standardized test performance •Secure school facility •Positive peer group
Denomination	Heavy Orthodox, also Conservative	Skew to Conservative	Proportionate to population	Skew to Reform, Reconstructionist, Other/Unaffiliated	Heavy skew to Reform
Other Profile Characteristics	<ul style="list-style-type: none"> •Attend synagogue frequently •Children's friends attend JDS •Children attend Jewish camp •Read <i>Jewish Advocate</i> 	<ul style="list-style-type: none"> •Attend synagogue a few times a month •Children's friends attend JDS •Children attend Jewish camp 	<ul style="list-style-type: none"> •Attend synagogue a few times a month •Children's friends do not attend JDS •Children attend Sunday School or Jewish camp •Lower income 	<ul style="list-style-type: none"> •Less likely synagogue members •Children's friends do not attend JDS •Children do not attend Jewish camp •Read <i>Boston Globe</i> 	<ul style="list-style-type: none"> •Higher rate of inter-marriage •Less likely synagogue members •Children's friends do not attend JDS •Read <i>Boston Globe</i>

According to the Believers, the greatest strengths of Jewish Day Schools are the teaching of Jewish culture and Hebrew language, ethics and values, and positive peer groups. These parents perceive math, science and English to be critical weaknesses of the schools.

QUADRANT ANALYSIS – JEWISH DAY SCHOOLS

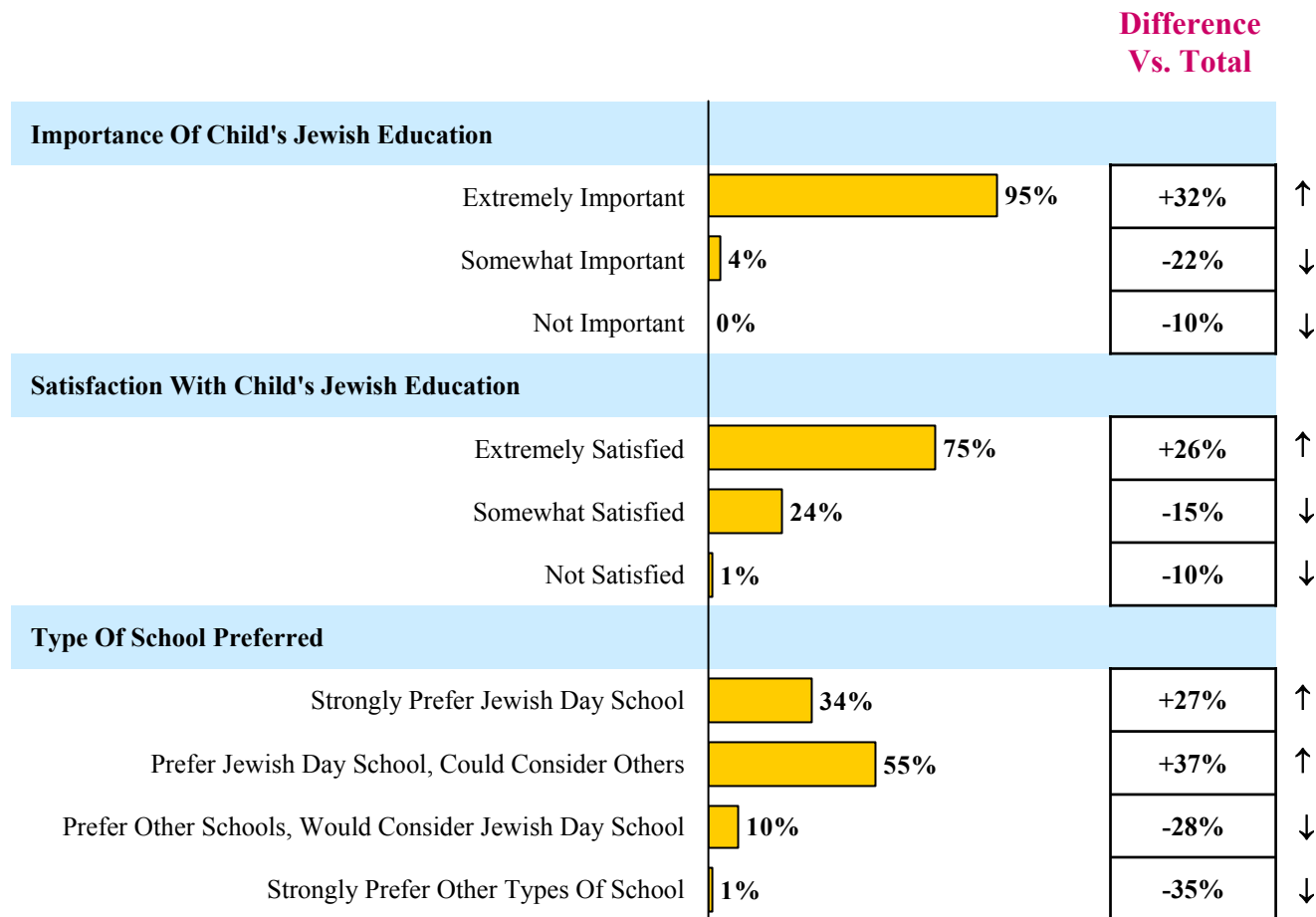
Importance Of School Attribute Vs. Perceived Jewish Day School Performance
Believers



The Believers think that Jewish education is extremely important. They are highly satisfied with their child's Jewish education and strongly prefer Jewish Day Schools.

ATTITUDES TOWARD JEWISH EDUCATION

Believers

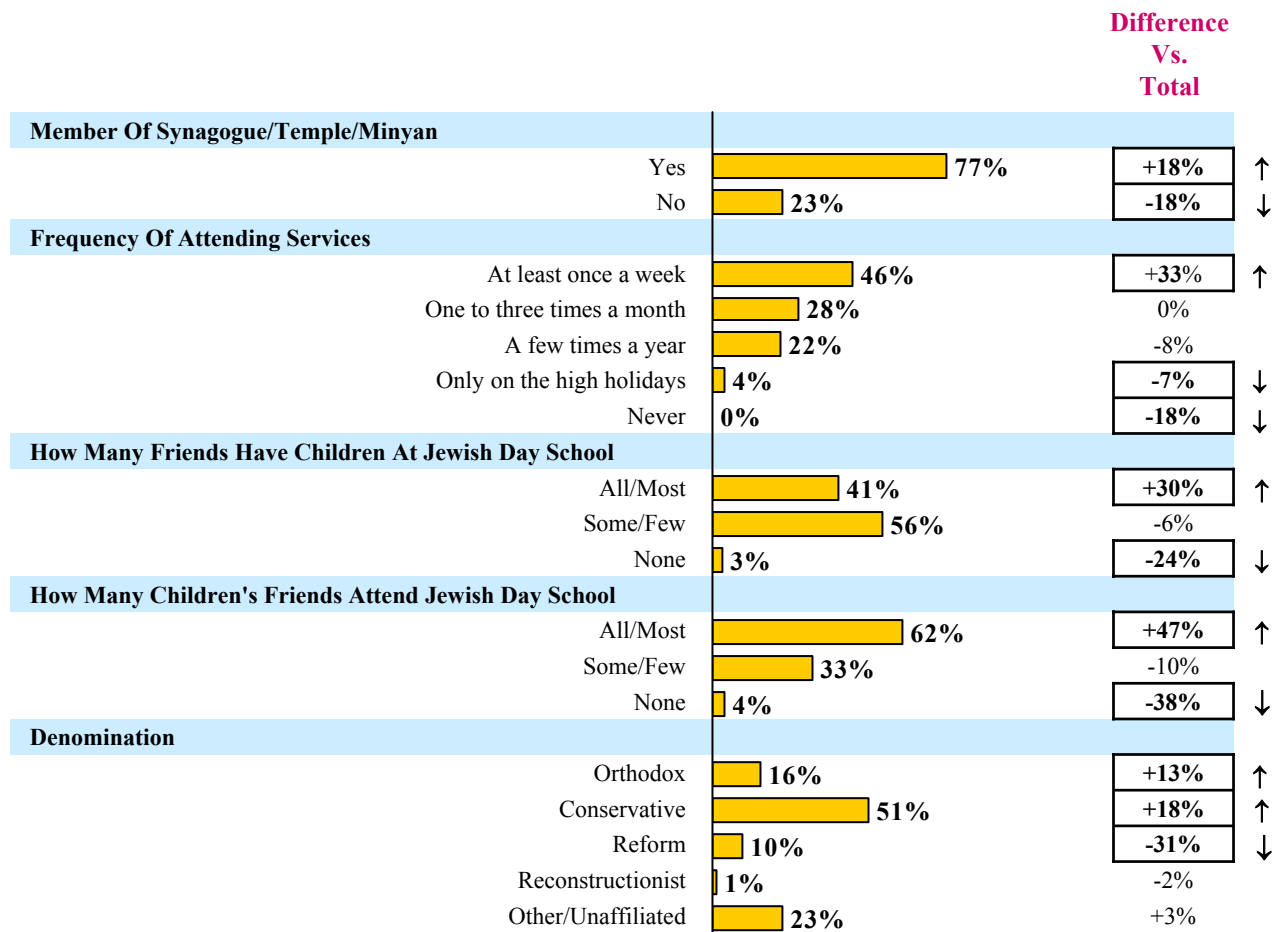


Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

Believers are strongly skewed toward Orthodox, and Conservative families. These parents are more likely to be synagogue members and attend services on a weekly basis. Their friends are likely to have their children at Jewish Day Schools.

DEMOGRAPHICS PROFILE

Believers

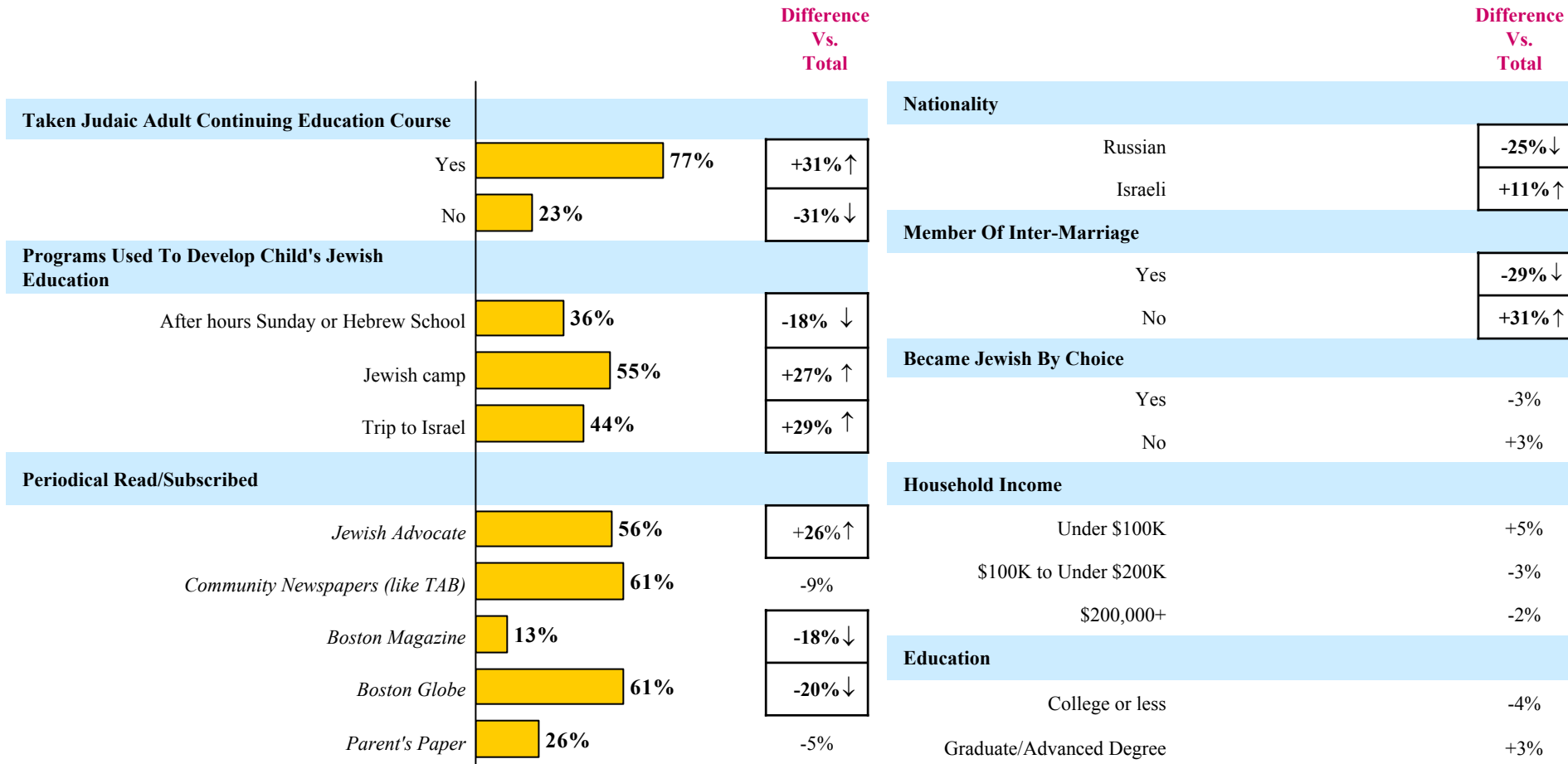


Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

Believers are more likely to be Israeli, but are less likely to be Russian. They tend to take Judaic Continuing Education classes, and send their children to Jewish camp. These parents may be targeted by the *Jewish Advocate*, but are less likely to read *Boston Magazine* or the *Globe*.

DEMOGRAPHICS PROFILE (CONTINUED)

Believers



Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

Segment 2 - Best of Both Worlds (BOBs)

The BOBs demand quality education, in areas such as math, science and English, but also value Jewish culture and practices. They want their children to have a Jewish education without sacrificing other areas. These parents are less concerned about affordable tuition, transportation, or special needs.

IMPORTANCE OF ATTRIBUTES WHEN CHOOSING A SCHOOL

Those Rating 8, 9 Or 10 On A 10-Point Scale

Best Of Both Worlds (BOBs)

			Difference Vs. Total	
Quality math and science programs	89%	+9%	↑	
Quality English program	86%	+13%	↑	
Secure school facility	72%	+8%		
Community for parents & family	70%	+11%	↑	
Quality arts programs	47%	+11%	↑	
Jewish culture and practices	42%	+18%	↑	
Not too many students	41%	+12%	↑	
Strong performance on standardized tests	39%	-11%	↓	
Has large social network for child	37%	-11%	↓	
Reasonable hours for students	30%	-12%	↓	
Quality athletic programs	26%	+6%		
Hebrew language education	25%	+7%		
Affordable tuition	18%	-19%	↓	
Convenient transportation	14%	-24%	↓	
Programs for special needs	14%	-12%	↓	

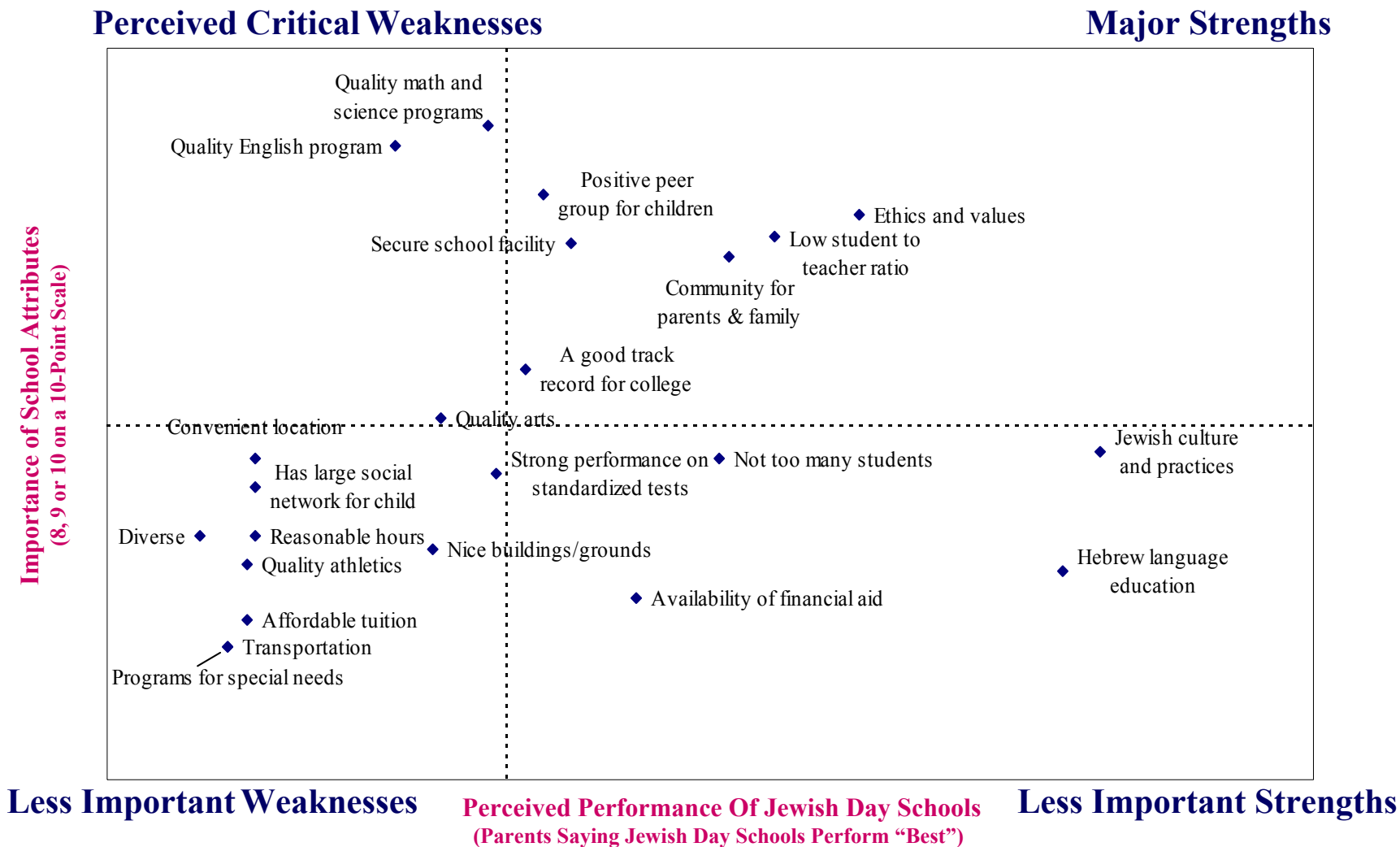
Q.8: Different things are important to different parents when deciding where to send their children to school. Please indicate how important each of the following items was to you the most recent time that you were considering a school for your (child/children).

Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

BOBs feel that the key strengths for Jewish Day Schools are the ethics and values, low student-teacher ratios and a sense of community. Critical weaknesses relate to the quality of math, science and English programs.

QUADRANT ANALYSIS – JEWISH DAY SCHOOLS

**Importance Of School Attribute Vs. Perceived Jewish Day School Performance
Best Of Both Worlds (BOBs)**



BOBs place great value on the importance of Jewish education, and place less importance on diversity. These parents also feel that public school cannot provide as strong of an education as private school.

ATTITUDES TOWARD RELIGION AND EDUCATION

Those Rating 8, 9 Or 10 On A 10-Point Scale

Best Of Both Worlds (BOBs)

		Difference Vs. Total	
It is very important for your child to develop a Jewish identity	86%	+23%	↑
You are willing to make personal sacrifices to give your child best education	84%	+12%	↑
Jewish education is essential for the continuity of the Jewish people	78%	+17%	↑
You want your child to have better Jewish education than you had	70%	+29%	↑
Jewish education is essential for supporting the state of Israel	61%	+24%	↑
Choosing a school is a long and difficult process	58%	+18%	↑
Child needs to interact with different backgrounds to learn to deal with people in real world	52%	-14%	↓
Important to go to right elementary/high school to get into right college	45%	+7%	
Children get just as good educations in public schools as private schools	29%	-25%	↓
Children learn intolerance if don't associate with other ethnicities/religions	25%	-18%	↓
You are uncomfortable applying for financial aid	15%	-7%	
You are uncomfortable in environments that are "too Jewish"	12%	-13%	↓

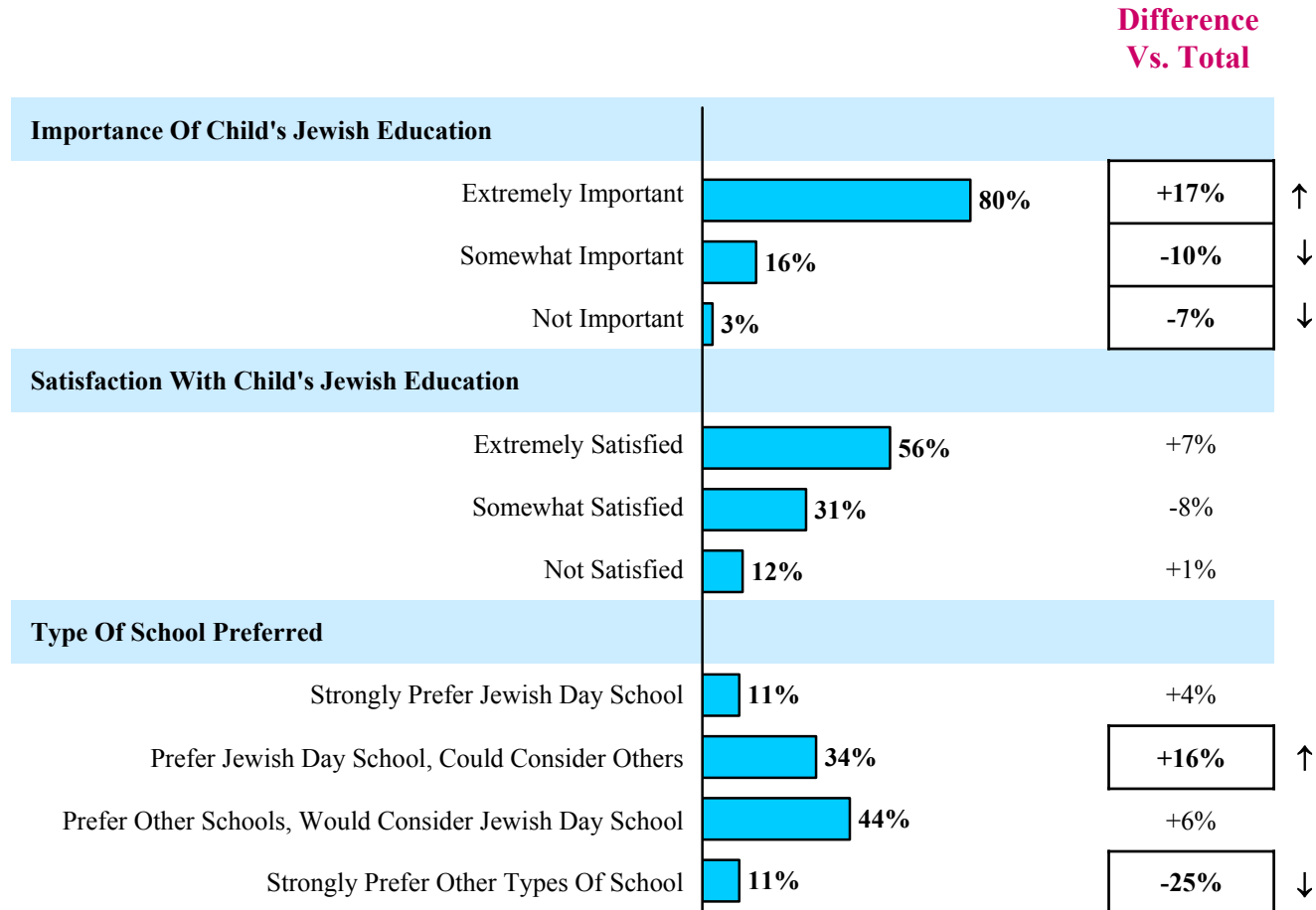
Q.11: Please indicate how strongly you agree or disagree with the following statements using a scale from 1 to 10, where a 10 means you strongly agree, a 5 or 6 means you neither agree nor disagree, and a 1 means you strongly disagree. You may use a 1, a 10, or any number in between.

Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

The BOBs place heavy importance on a Jewish education, though their satisfaction with Jewish school performance is not as strong as the Believers.

ATTITUDES TOWARD JEWISH EDUCATION

Best Of Both Worlds (BOBs)

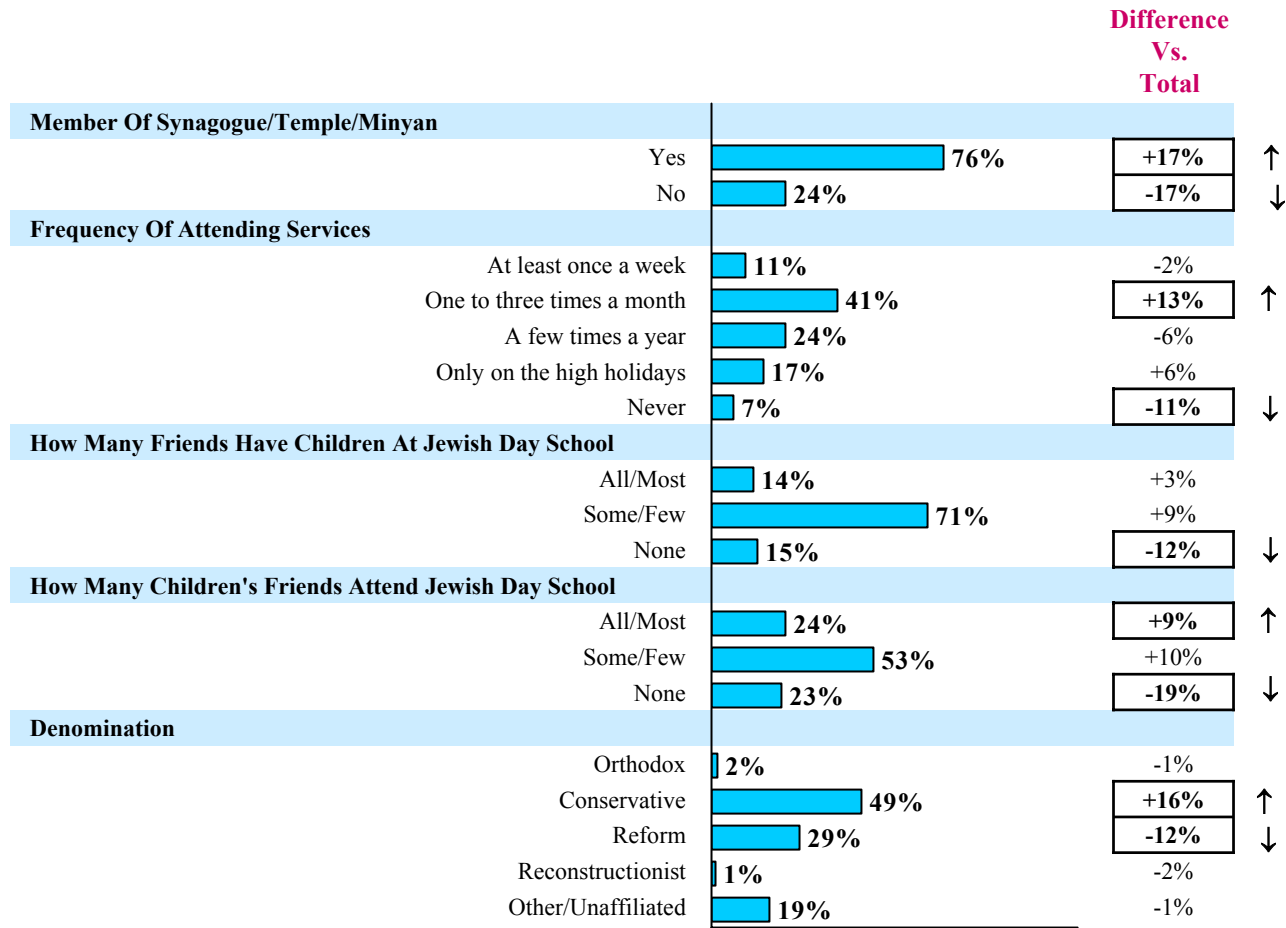


Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

BOBs skew towards Conservative families. They are likely to belong to a synagogue, and attend a few times a month. Their children's friends are likely to attend Jewish Day School.

DEMOGRAPHICS PROFILE

Best Of Both Worlds (BOBs)

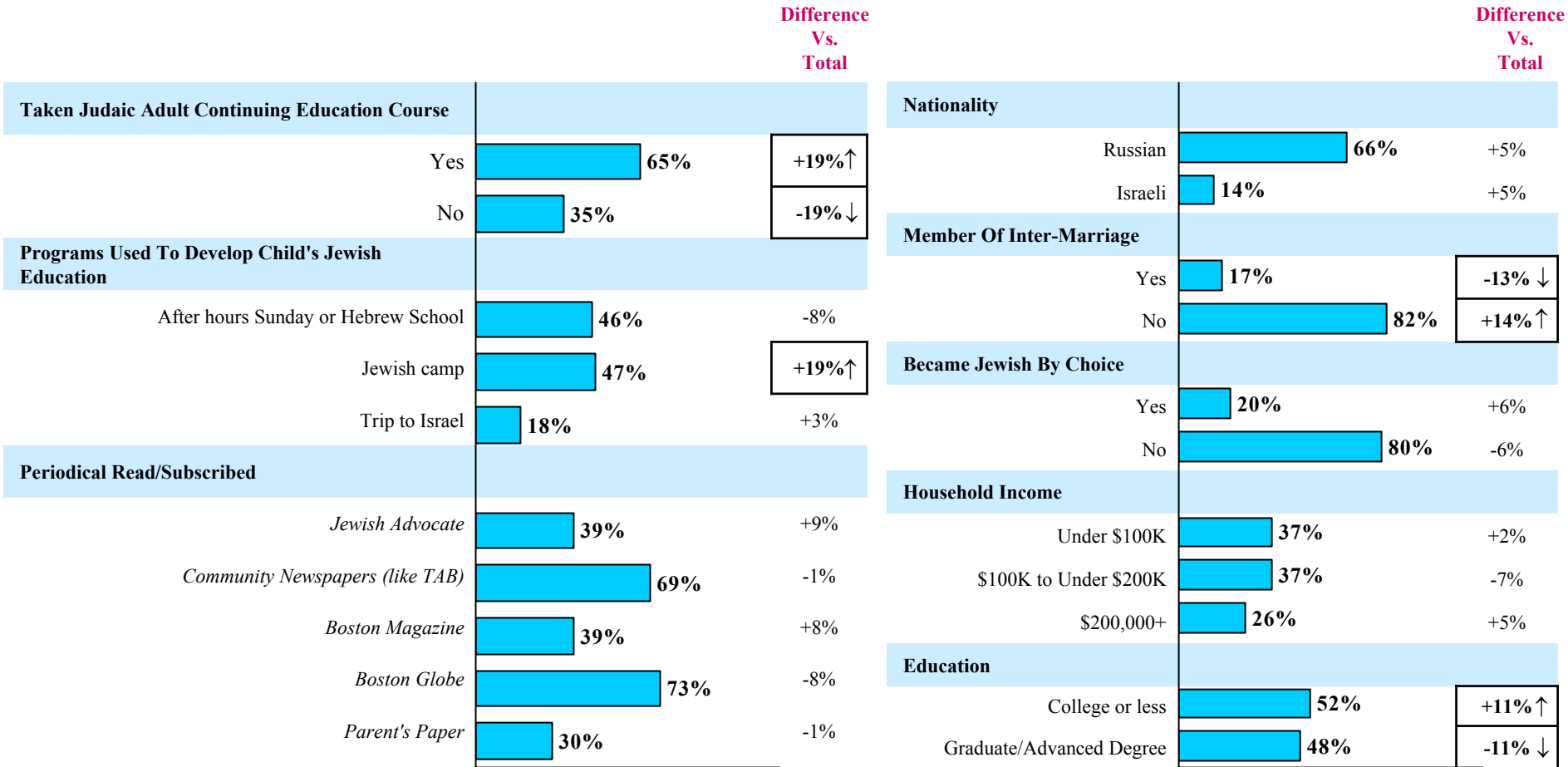


Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

BOBs are likely to take Judaic Adult Continuing Education, and send their children to Jewish camp. These parents are slightly more likely to read the *Jewish Advocate* and *Boston Magazine*.

DEMOGRAPHICS PROFILE (CONTINUED)

Best Of Both Worlds (BOBs)



Note: Boxed and bolded differences are significantly different than the total at the 95% level of confidence, with ↑ and ↓ indicating higher/lower than total.

LOWER PRIORITY SEGMENTS:

Segment 3 – Jewish Public School

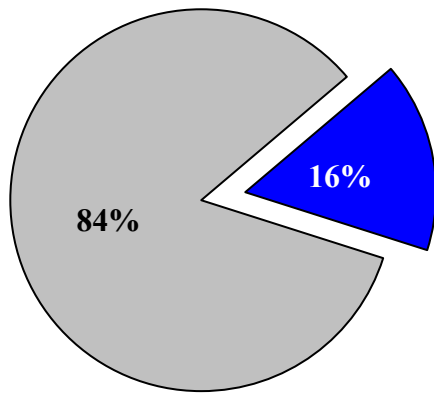
Segment 4 – Alternative Communities (A-COMs)

Segment 5 – Secular Academic Trackers (SATs)

The Jewish Public Schools are a lower priority segment. This group represents moderate opportunity and can be appealed to with messaging regarding the availability of financial aid and other “public school” attributes.

SEGMENT SUMMARY – Jewish Public Schools

All Other
Segments



JPSs

Segment Overview

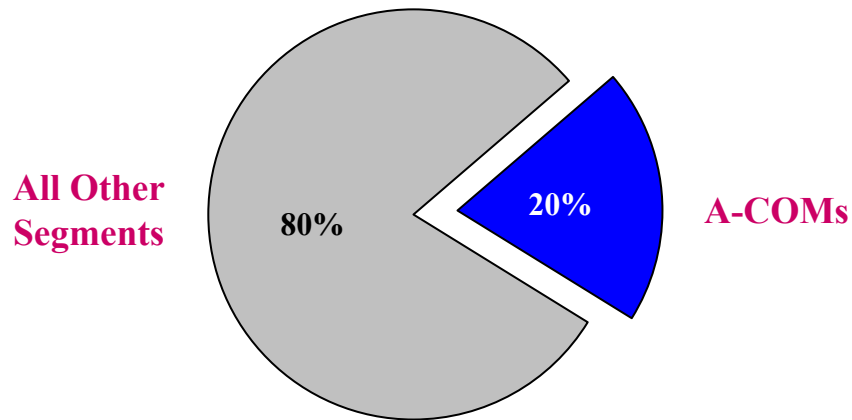
- Favor “public school” benefits (i.e. affordability, transportation, etc.)
- But still want a strong Jewish identity for their children
- Rely on Jewish camp or Sunday School for child’s Jewish education
- Slight skew towards Conservative denomination, though generally proportionate to population

Segment Recommendations

- Offer attractive financial aid programs
- Promote the perceived “conveniences” of public schools, such as transportation and special needs programs

The Alternative Communities are a lower priority segment. This group is characterized by parents that seek warm, enriching school environments for their children. They may be a difficult group to reach due to their very low consideration of Jewish Day Schools in general.

SEGMENT SUMMARY – Alternative Communities (A-COMs)



Segment Overview

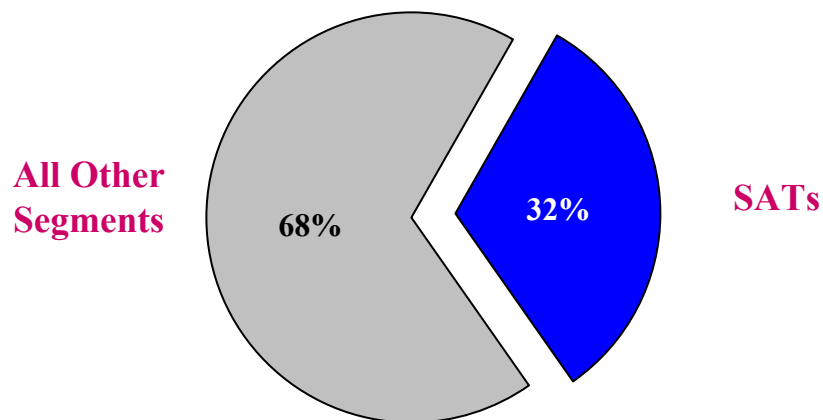
- Seek a warm school environment, reasonable hours, and a sense of community
- Difficult segment to attract due to their infrequent consideration of Day Schools
- Denominations skew toward Reform, Reconstructionist and Other/Unaffiliated

Segment Recommendations

- Messages related to the nurturing environments of Jewish Day schools, especially with regard to:
 - Ethics and values
 - Sense of community
 - Positive peer groups

The Secular Academic Trackers are a lower priority segment. They have the highest economic opportunity due to the large segment size and high household incomes. Despite this, their overall potential is limited because of their low receptivity to Jewish Day Schools.

SEGMENT SUMMARY – Secular Academic Trackers (SATs)



Segment Overview

- Most concerned with quality academics, as parents seek entrance into top colleges for their children
- Although many of their children attend Jewish pre-schools and they consider Day Schools, they rarely enroll
- Skew to the Reform denomination

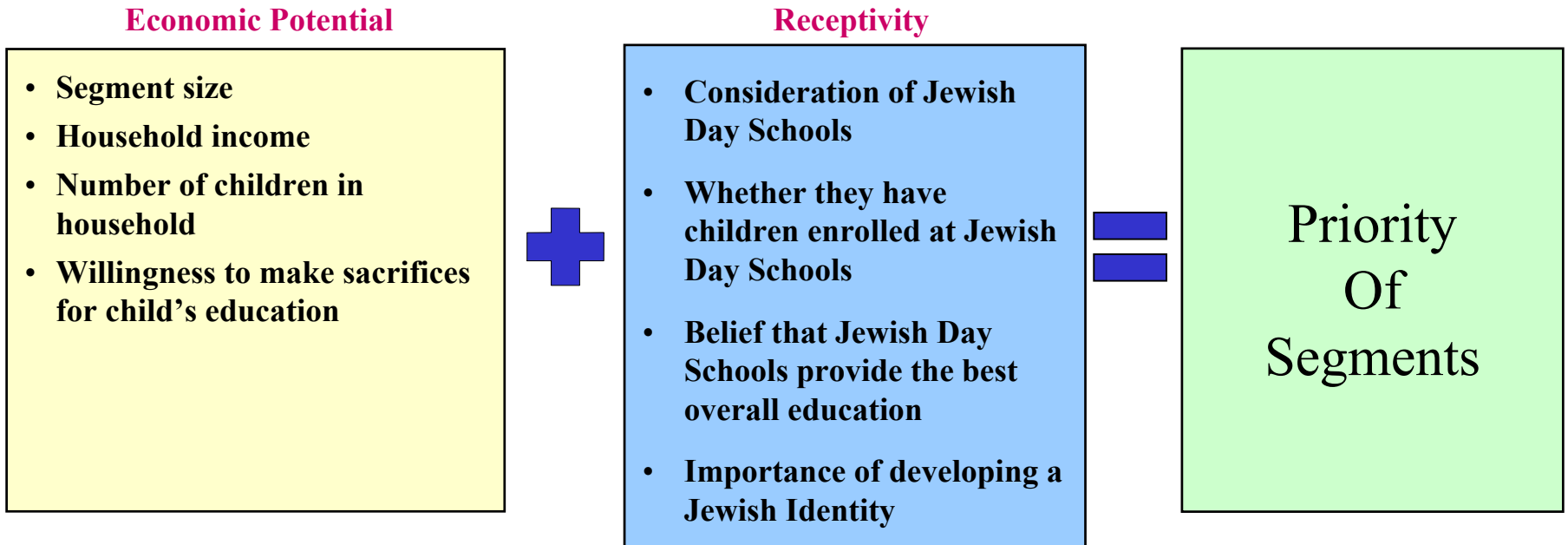
Segment Recommendations

- Messages related to high quality secular education, alumni college acceptance records and performance on standardized tests

Segment Opportunity Analysis

Opportunity Analysis

The purpose of opportunity analysis is to identify which segments to target by assessing each segment's **ECONOMIC POTENTIAL** (i.e., does the segment represent a sizable share of the market, do its members have money to spend on education?) and **RECEPTIVITY** (i.e. how easy will it be to capture the segment, do the parents within the segment consider Jewish Day Schools, do they believe that Jewish Day Schools offer good educations?) so that clear target segments emerge. The ideal target segments are those with high economic potential and high receptivity.



The SATs offer the greatest economic potential, due to their large proportion of the population and greater affluence. The Believers and BOBs show average levels of economic potential, though importantly, these parents are the most willing to make sacrifices for their children's education.

OPPORTUNITY ANALYSIS: ECONOMIC POTENTIAL

AVERAGE= 100

	Segment Size	HH Income (Mean)	Number of Children (Mean)	Willing to make sacrifices (Q11 Top 3 Box)	Total Economic Potential Index Score
Believers	70	95	114	118	97
Best Of Both Worlds	90	103	102	117	103
Jewish Public School	80	86	98	67	82
Alternative Communities	100	98	91	99	97
Secular Academic Trackers	160	108	100	99	114

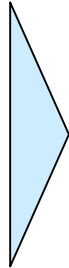
Note: Economic Potential Scores are shown as indexed against the total sample. A score of 100 indicates that the segment score is the same as the total sample. Scores above 100 indicate the segment is greater than the total, and scores below 100 indicate the segment is less than the total. The Total Economic Potential Index Score is an average of all indices for the segment.

- = strong economic potential
- = moderate economic potential



By far, the Believers show the highest levels of receptivity for Jewish Day Schools, followed by the BOBs. The other segments fall far behind in terms of their opportunity for Jewish Day Schools.

OPPORTUNITY ANALYSIS: RECEPTIVITY
AVERAGE= 100

	Consideration	Have Child Enrolled at JDS	JDS Provide Best Overall Education	Important to Develop Jewish Identity	Total Receptivity Index Score
Believers	167	329	317	156	228
Best Of Both Worlds	137	152	196	137	154
Jewish Public School	84	29	29	137	56
Alternative Communities	55	33	63	52	49
Secular Academic Trackers	80	33	21	67	44



Note: Receptivity Scores are shown as indexed against the total sample. A score of 100 indicates that the segment score is the same as the total sample. Scores above 100 indicate the segment is greater than the total, and scores below 100 indicate the segment is less than the total. The Total Receptivity Index Score is an average of all indices for the segment.

 = strong receptivity
 = moderate receptivity

The Believers are the strongest group for DAF, with by far the highest receptivity for Jewish Day Schools. However, the BOBs are likely the greatest source of opportunity for new enrollment. The remaining three segments are currently lower areas of opportunity.

COMBINED OPPORTUNITY ANALYSIS

	ECONOMIC POTENTIAL	RECEPTIVITY	TOTAL OPPORTUNITY INDEX	CURRENT ENROLLMENT PENETRATION	GOAL OF INCREASED ENROLLMENT
Believers	97	228	325	69%	+2%
Best Of Both Worlds	103	154	257	32%	+5%
Jewish Public School	82	56	138	6%	+1%
Alternative Communities	97	49	146	7%	+1%
Secular Academic Trackers	114	44	158	7%	+1%



Discriminant Function Analysis

One of the objectives of this study is to develop a discriminant function analysis (DFA) - a brief list of questions that can be used to classify families into the appropriate needs-based segment during the admissions process. LRW will provide DAF with an easy-to-use Excel tool that can be used to classify parents into Believers, BOBs, Jewish Public Schools and others. By having parents answer a brief list of 15 questions during the admissions process, schools can identify the segment membership of that parent and directly address their educational needs.

The 15-Question DFA includes:

Importance of:

- A school that doesn't have too many students
- Affordable tuition
- Convenient transportation available to the school
- Ethics and values that are taught at the school
- Jewish culture and practices
- Secure school facility
- Availability of financial aid

Agreement with:

- Choosing a school is a long and difficult process
- Jewish education is essential for supporting the state of Israel
- The right elementary or high school is important for college
- You are uncomfortable in environments with too much Jewish culture
- You want your child's Jewish education to be better than yours
- Your child needs to interact with all different types of people
- Your Jewish heritage is more cultural than religious
- It is very important for your child to develop a Jewish identity

For a more detailed report, please contact Ilene Sussman,
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