

"Count Me In"

The 2010 Study of the Rochester Jewish Community

Key Slide Presentation [Website Version]

10/18/10 Overview Report to the Community

Prepared by:

Jocelyn Goldberg-Schaible
Rochester Research Group

Prepared for:

Jack Finkelstein, Larry Fine and Judy Azoff
Jewish Federation of Rochester

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I BACKGROUND & INTRODUCTION

- The “Count Me In” study, despite its name, is not really about counting, not just about counting, and not only about counting. Its real purpose is to provide actionable insight to support the strategic and tactical planning process of our Jewish Community’s agencies, organizations, temples and synagogues over the decade to come.
- These planning processes will require insight that goes far beyond “how many” to understand what it is that our Jewish community members tell us they want, need, and value – and what they don’t want, don’t need, and don’t value. This study’s design, therefore, was by intent much more attitudinal than census.
- It was also a study designed right here, for our own community and its needs, in response to specific questions requested by the leadership [both professional and volunteer] who head up our Federation’s funded agencies, organizations, temples and synagogues. Ours was not a boiler-plate survey designed generically and then tweaked a bit for our community – ours was a survey designed by and for our own community. There is a significant difference there, and part of that difference is its fundamental intent. And that fundamental intent, once again, was not about counting.

I BACKGROUND & INTRODUCTION

- This presentation of findings – like all of our analyses of Count Me In findings -- will provide lots of numbers and charts. And a central part of the take-away from this particular presentation will include the “How Many?” analysis.
- Please understand that this study – and all other community demographic studies – represent estimates, rather than actuals. You will soon learn that there are an estimated 19,850 Jews living in the Rochester area, and an estimated 9,740 Jewish households. There may actually be a few hundred more or less of each.
- This is, by the way, always the case in community demographic surveys, irrespective of methodology and whether it’s telephone-based, online, or even face-to-face, even when charts and graphs imply more specificity than they can actually support, by providing numbers with several decimal places, and by performing convoluted analysis on those numbers.
- We will do none of that three-decimal-place pretending. Ours are estimates. Solid estimates, based on an extremely solid sample. But estimates nonetheless.
- Our study – by intent and design -- is fundamentally quite straightforward:

We asked.

You answered.

We learned.

- Now here is some of what we learned.

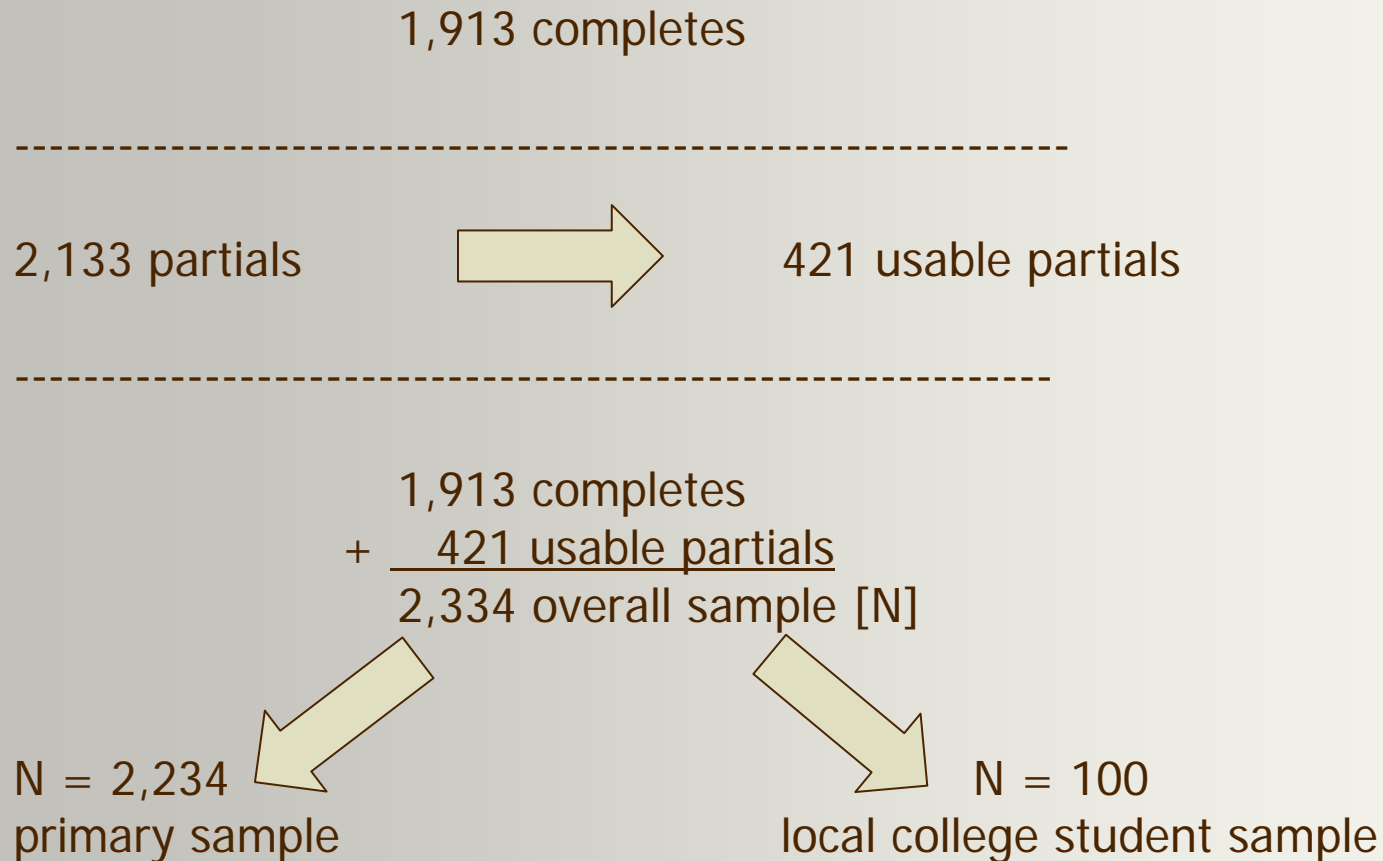
II STUDY METHODOLOGY

A) DERIVATION OF OUR SURVEY SAMPLE

- Beyond the 1,913 participants who completed the full in-depth interview in its entirety, and made it over the finish line – which in some cases required more than an hour of involvement – several hundred others began the survey process and made a non-trivial investment in participating. In a few cases they made it all the way to the final submit button, but then encountered technical difficulties submitting their survey. Either because of technical glitches, fatigue, or circumstantial interruption, in other words, some participants may not have made it all the way over the finish line, but their efforts were not wasted because their input was able to be salvaged and utilized.
- Some re-entered the survey and tried again later on, and were successful in crossing the finish line that time – in which case we disallowed their partial attempts and culled them out of the data base. Others may have entered the online survey out of curiosity -- like members of the media, or those who did not qualify because they were not Jewish – and along with those who participated in relatively few questions, their partials were culled out of the system and not included in our data. The data cleaning process was a careful, thoughtful, and painstaking one – but the quality of our final sample depended upon it directly.
- We ended this data cleaning process having culled 2,133 partials down to 421 usable partials – in other words, fully-qualified participants who made a serious effort to participate – and true to our word, they too are now part of our “Count Me In” findings. So our final participant sample [N] now ends up at $1,913 + 421 = 2,334$. Holding our college student sample aside [N=100] since they branched off to answer their own parallel set of questions, our remaining primary sample – upon which we’ll be basing most of our analyses -- becomes 2,334.

II STUDY METHODOLOGY

A) DERIVATION OF OUR SURVEY SAMPLE



II STUDY METHODOLOGY (continued)

B) CMI's "VIRAL" SAMPLING STRATEGY

- **This study's sample was not pre-determined or systematically controlled, but rather viral by design. What is a viral sample? It may sound nasty, but it isn't. It's really very clever, and highly inclusive. Simply speaking, a viral sample works like this:**
 - "A" reads about the Count Me In survey, perhaps in one of the area newspapers, or the Federation Focus, or sees mention of it in any number of other channels and venues where we'd communicated so effectively about the study and its intent.
 - "A" mentions it to "B" and "C" over coffee one morning. "C" goes online and gives it a try, then forwards the link to "D" and "E" and "F". "E" and "F" tell their husbands about it, and F's husband participates that night. He's so impressed by its breadth and depth, that he mentions it at the JCC the next morning to his sweaty friend "G", who forwards the link on to "H".
 - "H" and his wife participate that night, and a few days later, H's wife tells her aging mother and mother-in-law about it. Her Mom was way ahead of her, and had already participated in it on her own computer, but her mother-in-law needed a little help, so daughter-in-law "H" shepherded her through it after Sunday dinner that next weekend. Well, grandma "H" enjoyed the experience of participating so much that she tells her bridge friends all about it, some of whom live at the Summit, some at St. John's Meadows, and some in their own homes.
 - Several of these gray-haired friends are able to participate using computers made available in those venues, or at the JCC, while others do so with the help of CMI volunteer interviewers. Old Mrs. "I" and "J" tell their children about having participated, so those children -- "K", "L", and "M" -- participate as well.
 - "M" is a member of Temple X, and tells her friends "N" and "O" about the survey. Even though the Temple X bulletin had written about the survey and encouraged its members to participate, "N" is a past member of Temple X, and "O"'s children are still small and hasn't joined a Temple yet. But after hearing about it from "M", they both participate as well.
 - "O" mentions the survey to "P" and "Q", whose children all go to pre-school together, and also to "R", an old friend from Camp Seneca Lake. "R" mentions it to "S" and "T", who also went to CSL decades ago, but who now live in Batavia and Geneva. "T" has a daughter at SUNY Geneseo, who heard about the survey through Hillel on campus, and also a grown son who's connection with the Jewish community has been minimal at best these last few years, but both participate, and then mention it to a couple of friends.

II STUDY METHODOLOGY (continued)

B) CMI's "VIRAL" SAMPLING STRATEGY

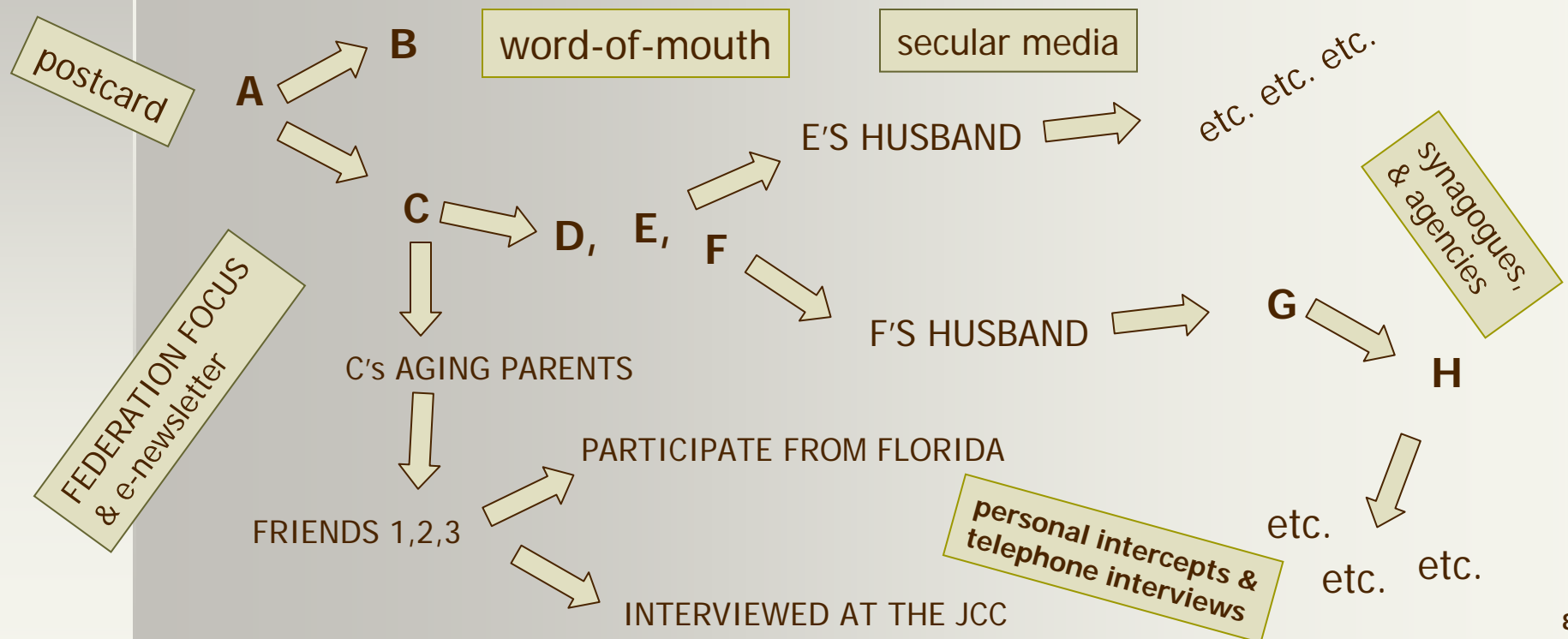
- Along the way, this pattern was repeated in myriad contexts, as our sample snow-balled and veered around the community in various directions, picking up momentum over a sustained 8-week period. Meantime, the person-to-person viral effect was fueled by a constant parade of media and PR spotlights. It seems safe to say that few Jews in the greater Rochester area ended those eight weeks unaware of that the Count Me In survey was taking place.
- Some of those in our alphabet soup of a sample were from interfaith households, some were GLBT, some were aging, some just starting their families, some relatively new to our community, some lifelong area residents, some highly affiliated, some only marginally affiliated, some not at all affiliated, some living at our community's center, and others in the more Jewishly remote surrounding areas.

AS A RESULT OF THIS VIRAL APPROACH,
THE COUNT ME IN SURVEY'S SAMPLE IS
INCLUSIVE, ROBUST, AND ACTIONABLE.

II STUDY METHODOLOGY (continued)

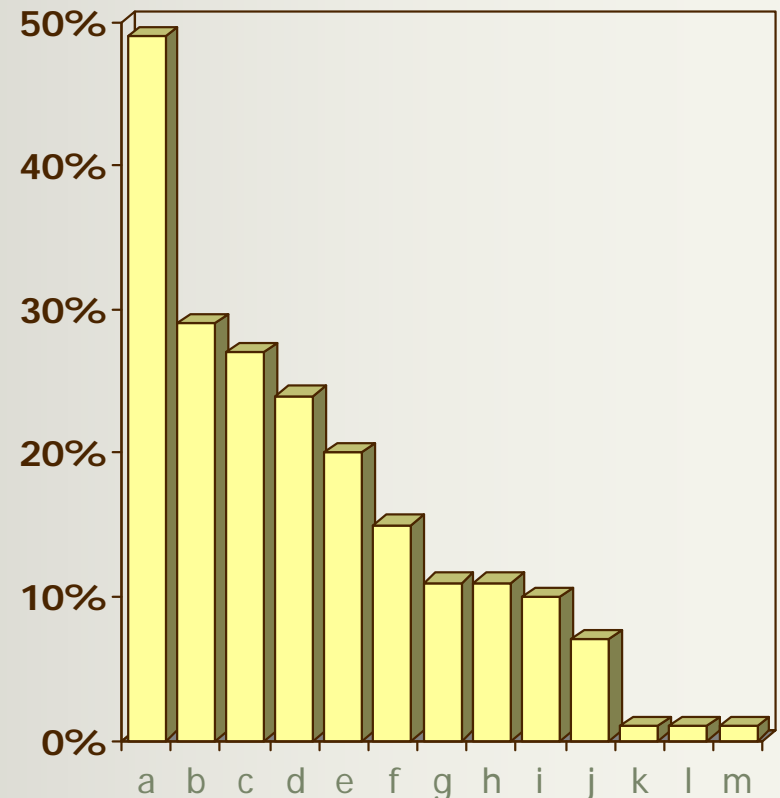
B) CMI's "VIRAL" SAMPLING STRATEGY

- This study's sample was not pre-determined or systematically controlled, but rather viral by design. What is a viral sample? It may sound nasty, but it isn't. It's really very clever, and highly inclusive.



Q137) How did you hear about this survey? [Please choose all that apply:]




- a) Received a postcard or flyer in the mail [49%]
- b) Heard about it from (or at) my temple / synagogue [29%]
- c) Other → please specify (*"personal referral from a friend, acquaintance, neighbor, relative" etc.*) [27%]
- d) Read about it in the Jewish Federation e-newsletter [24%]
- e) Word of mouth – heard people talking about it [20%]
- f) Heard about it from (or at) the JCC [15%]
- g) Read about it in the secular press (in an ad or article) [11%]
- h) Read about it in the printed edition of Federation Focus [11%]
- i) Saw a poster or flyer in some Jewish context [10%]
- j) Read about it in the Jewish press (in an ad or article) [7%]
- k) Saw a poster or flyer in a secular context [1%]
- l) I saw the interviewing being conducted in some secular public space [1%]
- m) I was interviewed in the senior community where I live [1%]



II STUDY METHODOLOGY (continued)

C) THE 'COUNT ME IN' RESEARCH APPROACH

**BY DESIGN,
IN TERMS OF BOTH PARTICIPATION AND CONTENT,
THE COUNT ME IN SURVEY IS**

-  **INCLUSIVE**
-  **ROBUST**
-  **ACTIONABLE**

STUDY METHODOLOGY (continued)

C) THE 'COUNT ME IN' RESEARCH APPROACH

INCLUSIVE

- Perhaps the best aspect of this sampling strategy was its broad-based inclusiveness. This year, everyone who wanted to participate had the opportunity to do so. In contrast with a telephone-based survey that works from a pre-determined list and/or Random Digit Dialing [RDD] and/or a set of Distinctively Jewish Names [DJN], no one in our community with ideas and opinions and experiences to share was left out of this survey. Ours was truly a COMMUNITY survey -- and everyone who took part now gets to feel that their ideas and opinions and experiences have indeed been COUNTED IN.
- Moreover, this sampling approach, and the fact that our survey was fielded online, did not, as some initially feared, turn out to be in any way AGE-BIASED. Our sample has a highly robust set of respondents across all age cohorts, including over 500 respondents in their 70s and 80s+.
- And while volunteers were trained and ready to help anyone and everyone who might need assistance in order to participate [including frail elderly, disabled, Russian-speakers, etc.] many of our oldest respondents participated entirely on their own within the very first week after the survey's launch. Our shift in methodology, in other words, clearly provided a more inclusive participant cross-section.

STUDY METHODOLOGY (continued)

C) THE 'COUNT ME IN' RESEARCH APPROACH

ROBUST

- As a result, the Count Me In survey ended up with a sample that is statistically robust beyond all expectations.
- With 2,234 respondents [and another 100 college students attending local colleges] our overall sample is conservatively associated with a precision interval (or margin of error) of $\pm 3\%$ at the 95% confidence level, suggesting that our findings and projections should be within 3% of what we would have found if everyone in our Jewish community had participated.
- For the sake of comparison, national election polling predictions are based on smaller samples than ours. Communities like Philadelphia, whose Jewish population is roughly ten times larger than our own, recently completed their demographic study with a sample roughly half as large as ours. And ten years ago, when Rochester undertook its last demographic study, our sample was less than one-third as large as ours is today.
- Clearly, with respect to both quality and quantity, the Count Me In sample is one we can be proud of.

STUDY METHODOLOGY (continued)

C) THE 'COUNT ME IN' RESEARCH APPROACH

ACTIONABLE

- As long as our interview was -- and for some it was more than an hour in length -- it could easily have been a lot longer if we hadn't been firm in designing the study to focus solely on questions whose findings would be actionable -- in other words, questions whose answers would support planning decisions with which our community's organizations, agencies and synagogues are grappling, and will be grappling, in the years to come.
- Even though it was tempting to also include things that would have been just plain interesting, and nice to know, we chose to focus instead on the most actionable questions submitted by each of our community's agencies and synagogues, who came and met with the survey's designers, and submitted their wish-list in response to the following invitation:

Q. What would you like to learn about our Jewish community, and what would you like to learn from our Jewish community, to help your organization plan on our community's behalf throughout the next several years?

II STUDY METHODOLOGY (continued)

D) METHODOLOGICAL BOTTOM LINE

**The findings from this in-depth study
should hopefully provide ongoing insight
which carries us insightfully into the decade ahead.**



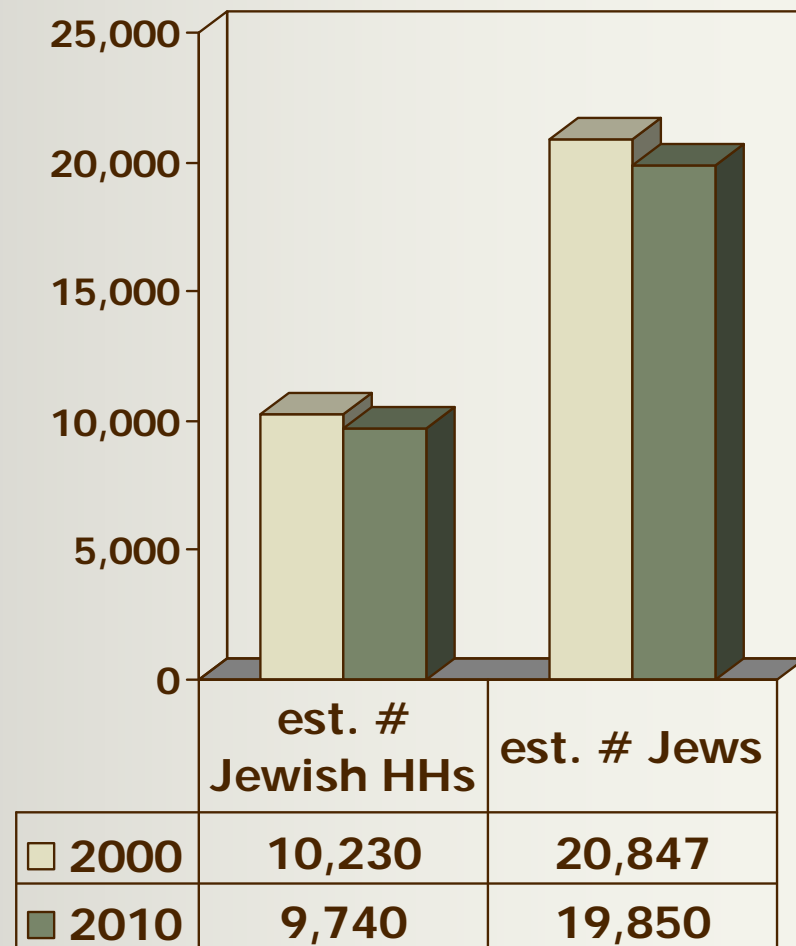
**In a very empowering way,
throughout the entire “Count Me In” process,
we have built community
by studying our community.**

III

ASSEMBLED FINDINGS

So how many of us are there?

- There are an estimated 19,850 Jews living in the Rochester area today [2010].
- There were an estimated 20,847 Jews living in Monroe County in 2000.
- Over the past decade, this represents an estimated 4.8% decline across the region, or an 8% decline within Monroe County.
- There are an estimated 9,740 Jewish households in the Rochester area today [2010].
- There were an estimated 10,230 Jewish households in Monroe County in 2000.
- This, too, represents over the past decade an estimated 4.8% decline across the region, or an 8% decline within Monroe County.



How Much of the Community Participated in the Count Me In Survey?

Calculating our 2010 Survey's Response Rate

- Of those who participated in our 2010 survey, 14% indicated that someone else in their household had participated as well.
- Our 2,234 respondents, therefore, represent a net of 1,921 different households.
- Of our projected total of 9,740 Jewish households, in other words, 1,921 represents a **household response rate** (at 19.7%) **of nearly 20%**.
- Of our projected total of 19,850 Jews in the Rochester area (less the 4,820 children and teens who were too young to participate in our survey) the 2,234 who did participate out of 15,030 old enough to do so represent a **personal response rate** (at 14.9%) **of nearly 15%**.
- By way of historical comparison, in **2000** the 708 respondents represented a **household response rate** [708/10,230 = 6.9%] **of nearly 7%**.
- **In 2000**, of the projected total of 20,847 Jews in the Rochester area (less the 6,100 children and teens who were too young to participate in that survey) the 708 respondents who did participate out of 14,747 old enough to do so represented a **personal response rate** (at 4.8%) **of nearly 5%**.

	2000	2010
HH response rate	7%	20%
Personal response rate	5%	15%

- **By all measures, our 2010 study's response rate was a robust and impressive one – owing to the accessibility of the online survey methodology, and the community's widespread communication and enthusiastic support on behalf of that methodology.**

Geographically, what do we know about our Jewish community today?

Methodological Note: It is a fact that across the US, zip code demarcations and town/village/municipality boundaries are not always aligned. Neither are electoral districts and, in some parts of the country, even time zones.

In presenting our findings, our geographic analysis is based upon each household's reported zip code, and those zip codes are analytically referred to by their closest neighborhood equivalent – although they are not always one and the same.

For example, to provide a frame of reference that enables the reader to visualize the basic area we're referring to, we'll refer to "Brighton" as the area including the zips 14618, 14610 and 14620 – even though some who live in 14610 and 14620 actually reside within the City of Rochester, send their children to City schools, etc. Likewise, we'll refer to "Pittsford" as the area including the zip 14534, even though some with the mailing zip 14618 may actually pay Pittsford property taxes and/or send their children to Pittsford schools.

In other words, please think of the designations "Brighton", "Pittsford", etc. as neighborhoods, to help visualize the basic geographic "chunks" of our community, rather than thinking of them too literally with hard-edged boundaries.

Where do we live today?

Our 2,234 respondents' households live in the following individual zips across the greater Rochester area, arranged in descending order:

- 14618 = 779 [Brighton]
- 14534 = 412 [Pittsford]
- 14610 = 197 [Brighton]
- 14620 = 138 [Brighton]
- 14450 = 77 [Perinton / Fairport]
- 14625 = 61 [Penfield]
- 14526 = 59 [Penfield]
- 14607 = 56 [City]
- 14623 = 49 [Henrietta]
- 14617 = 49 [Irondequoit]
- 14580 = 37 [Webster]
- 14609 = 23 [City]
- 14622 = 21 [Irondequoit]
- 14420 = 20 [Brockport]
- 14472 = 15 [Honeoye Falls]
- 14467 = 14 [Henrietta]
- 14424 = 12 [Canandaigua]
- 14586 = 11 [Henrietta]
- 8 each: 14605, 14619, 14624, 14612, 14616
- 7 each: 14604, 14456, 14559
- 6 each: 14468
- 5 each: 14565, 14626, 14454
- 4 each: 14445, 14543, 14608, 14502
- 3 each: 14615, 14425, 14546
- 2 each: 14621, 14692, 14418, 14464, 14513, 14514, 14522, 14568, 14020
- 1 each: 14506, 14613, 14411, 14422, 14423, 14432, 14011, 14469, 14471, 14485, 14505
- And 61 offered assorted zip codes from beyond the survey area [eg. Florida, etc.]

Observation: This zip code roster speaks to the broad-based reach of our survey, and the wide dispersion of our Jewish community, across the greater Rochester region.

Where do we live today?

Taking these individual zips and clustering them geographically, we are better able to visualize the geographic distribution of our Jewish community across the region:

Brighton Zips
1,114 or 51%

- 14618 = 779 [Brighton]
- 14610 = 197 [Brighton]
- 14620 = 138 [Brighton]

Pittsford
412 or 19%

- 14534 = 412 [Pittsford]

Collar
Community
Crescent
337 or 16%

- 14580 = 37 [Webster]
- 14625 = 61 & 14526 = 59 [Penfield]
- 14445 = 4 [East Rochester]
- 14450 = 77 [Perinton / Fairport]
- 14564 = 5 [Victor]
- 14472 = 15, 14506 = 1 [Honeoye Falls / Mendon]
- 14543 = 4 [Rush]
- 14623 = 49, 14467 = 14, 14586 = 11 [Henrietta]

Rest of the City (including Irondequoit & Greece) 217 or 10%

14617 = 49, 14622 = 22 [Irondequoit]
14607 = 56, 14609 = 23
14612 = 8, 14616 = 8, 14626 = 5, 14615 = 3 [Greece]
14605 = 8, 14619 = 8, 14624 = 8, 14604 = 7, 14608 = 4
14611 = 3, 14621 = 2, 14692 = 2, 14606 = 1, 14613 = 1

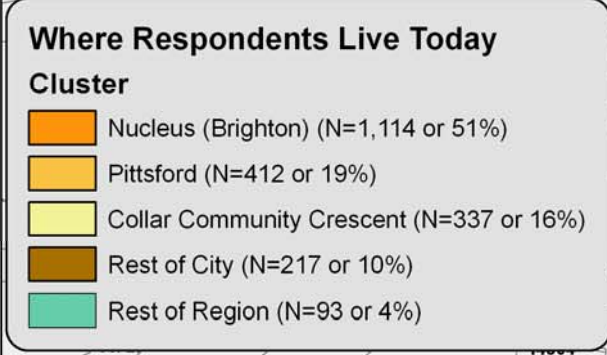
Rest of the Region 93 or 4%

14420 = 20 [Brockport]
14424 = 12, 14425 = 3 [Canandaigua]
14456 = 7 [Geneva]
14559 = 7 [Spencerport]
14468 = 6 [Hilton]
14454 = 5 [Geneseo]
14502 = 4 [Macedon]
14546 = 3 [Scottsville]
14020 = 2, 14011 = 1 [Batavia]
14418 = 2 [Branchport]
14464 = 2 [Hamlin]
14513 = 2 [Newark]
14514 = 2 [Chili]
14522 = 2 [Palmyra]
14568 = 2 [Walworth]

1 each: 14411 [Albion], 14422 [Byron],
14518 [Oaks Corners], 14520 [Ontario],
14527 [Penn Yan], 14423 [Caledonia],
14432 [Clifton Springs], 14485 [Lima],
14469 [Bloomfield], 14505 [Marion],
14471 [Honeoye]

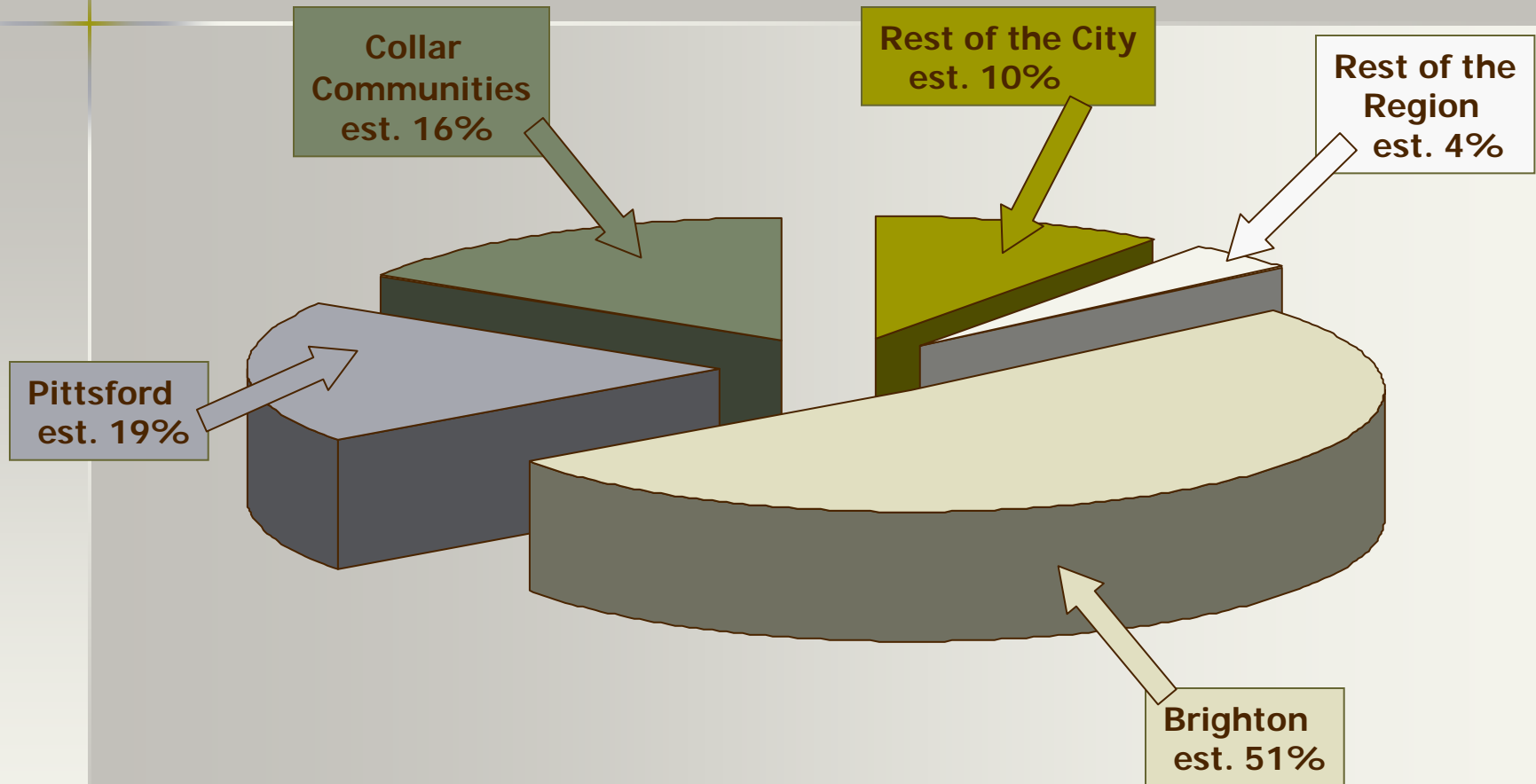
...and 61 assorted zips from beyond
the survey area [eg. Florida, etc.]

Where Our 2,234 Respondents Live Today:
An Overview of the Five Zip-Code-Based Clusters
Comprising our Jewish Community Today [2010]



Where do we live today?

Roughly what proportion of our Jewish Community now resides within each of these geographic clusters?



Where We Live in 2010 [est. % of the Jewish Community]

Rest of the City est. 10%

Brighton est. 51%

Collar Communities est. 16%
[Webster, Penfield, Fairport, Perinton, Victor,
Mendon, Honeoye Falls, Rush, Henrietta]

Pittsford est. 19%

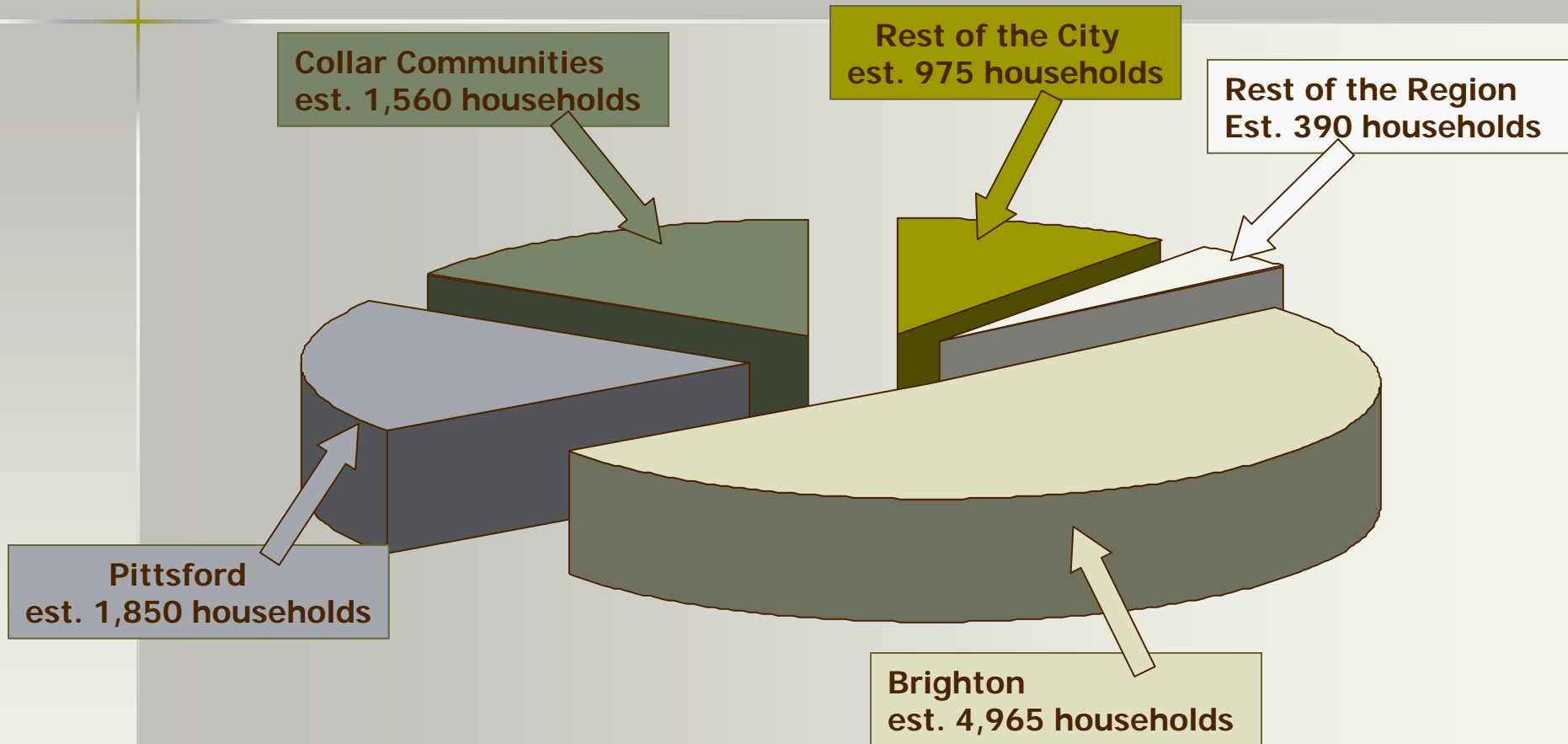
Rest of the Region est. 4%

Community Cluster Key

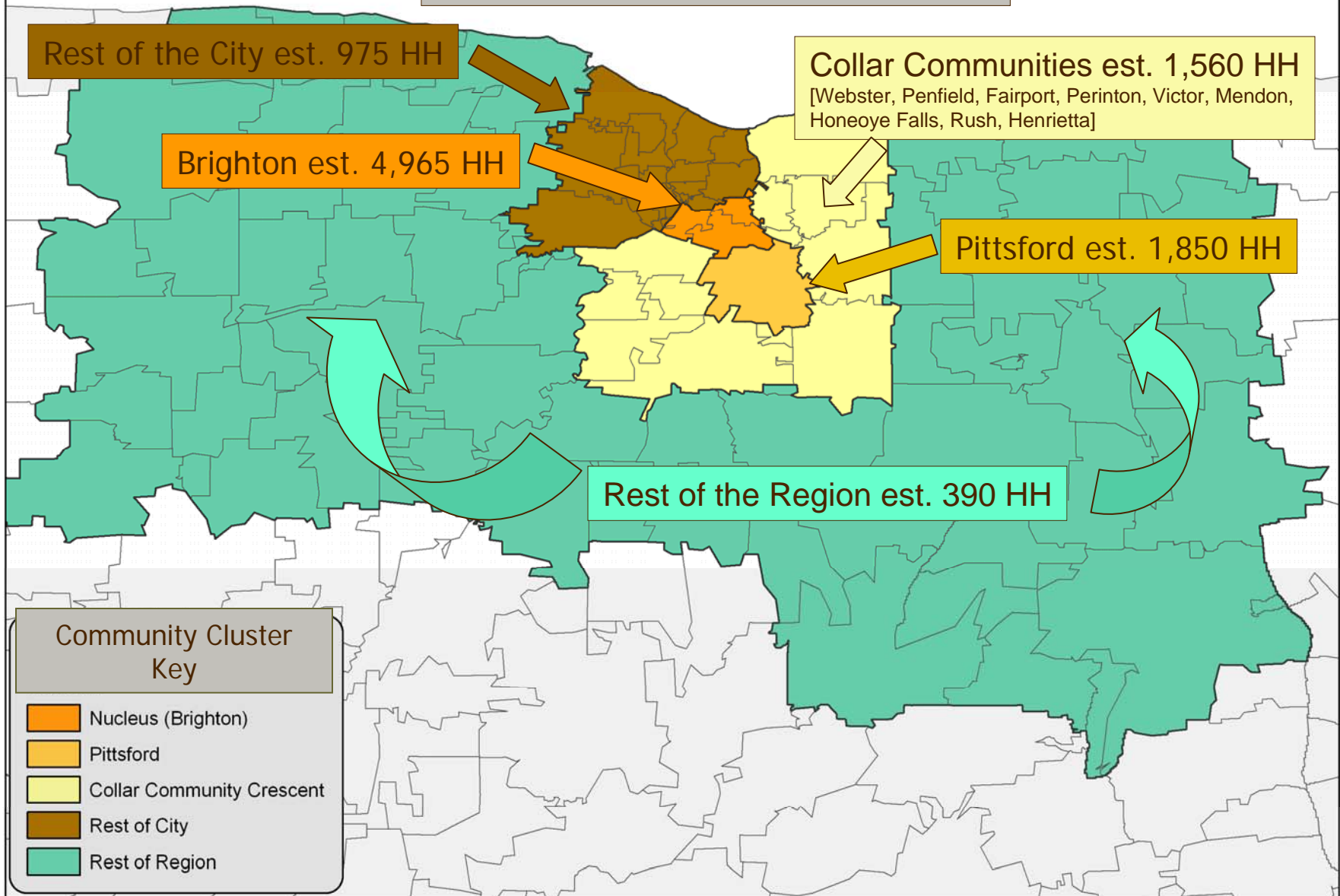
- Nucleus (Brighton)
- Pittsford
- Collar Community Crescent
- Rest of City
- Rest of Region

Where do we live today?

Roughly how many Jewish households are there within each of these geographic clusters?

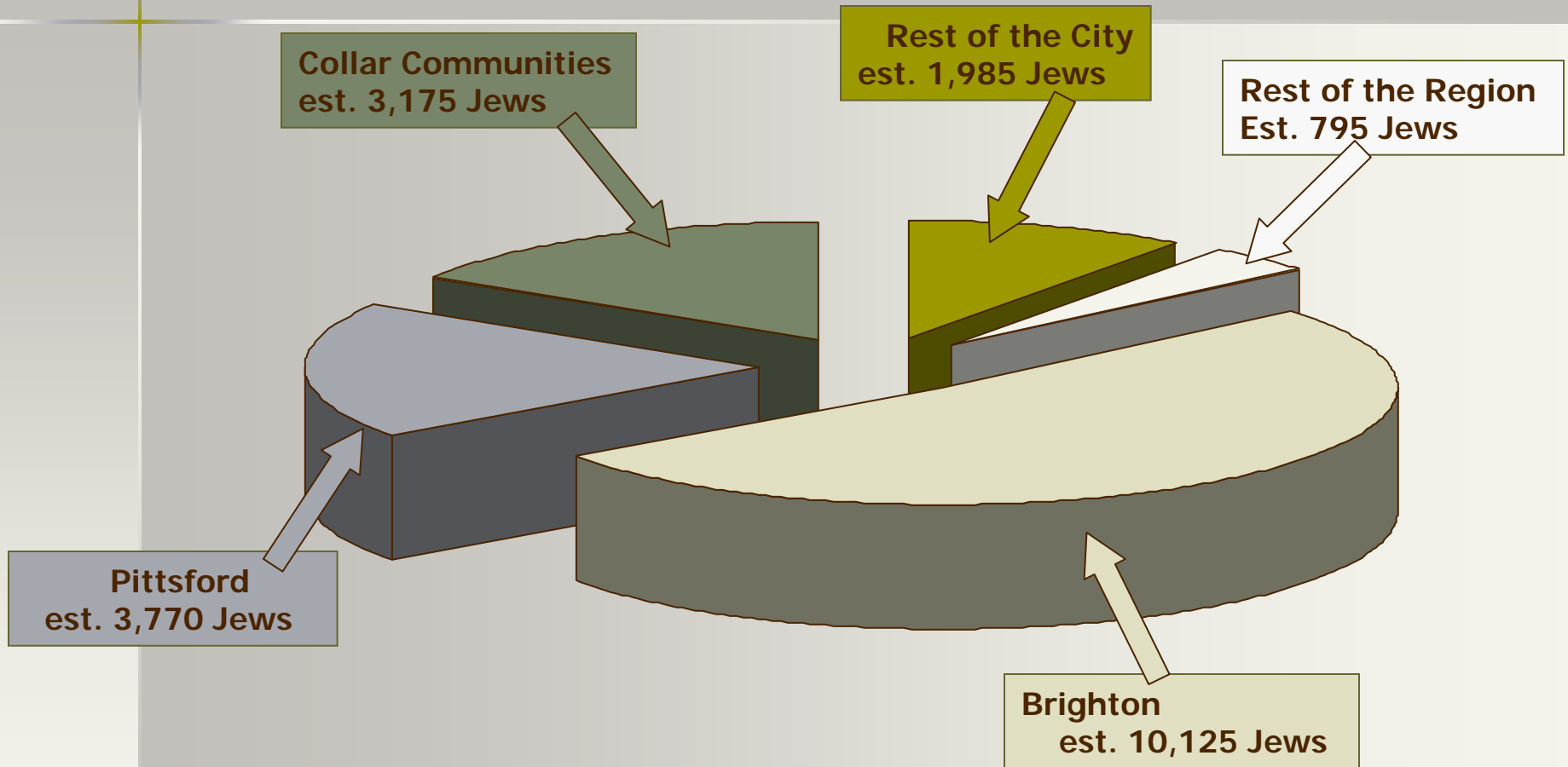


Where We Live in 2010 [est. # of Jewish Households]



Where do we live today?

Roughly how many Jews are there within each of these geographic clusters?



Where We Live in 2010 [est. # of Jews]

Rest of the City est. 1,985 Jews

Brighton est. 10,125 Jews

Collar Communities est. 3,175 Jews
[Webster, Penfield, Fairport, Perinton, Victor, Mendon,
Honeoye Falls, Rush, Henrietta]

Pittsford est. 3,770 Jews

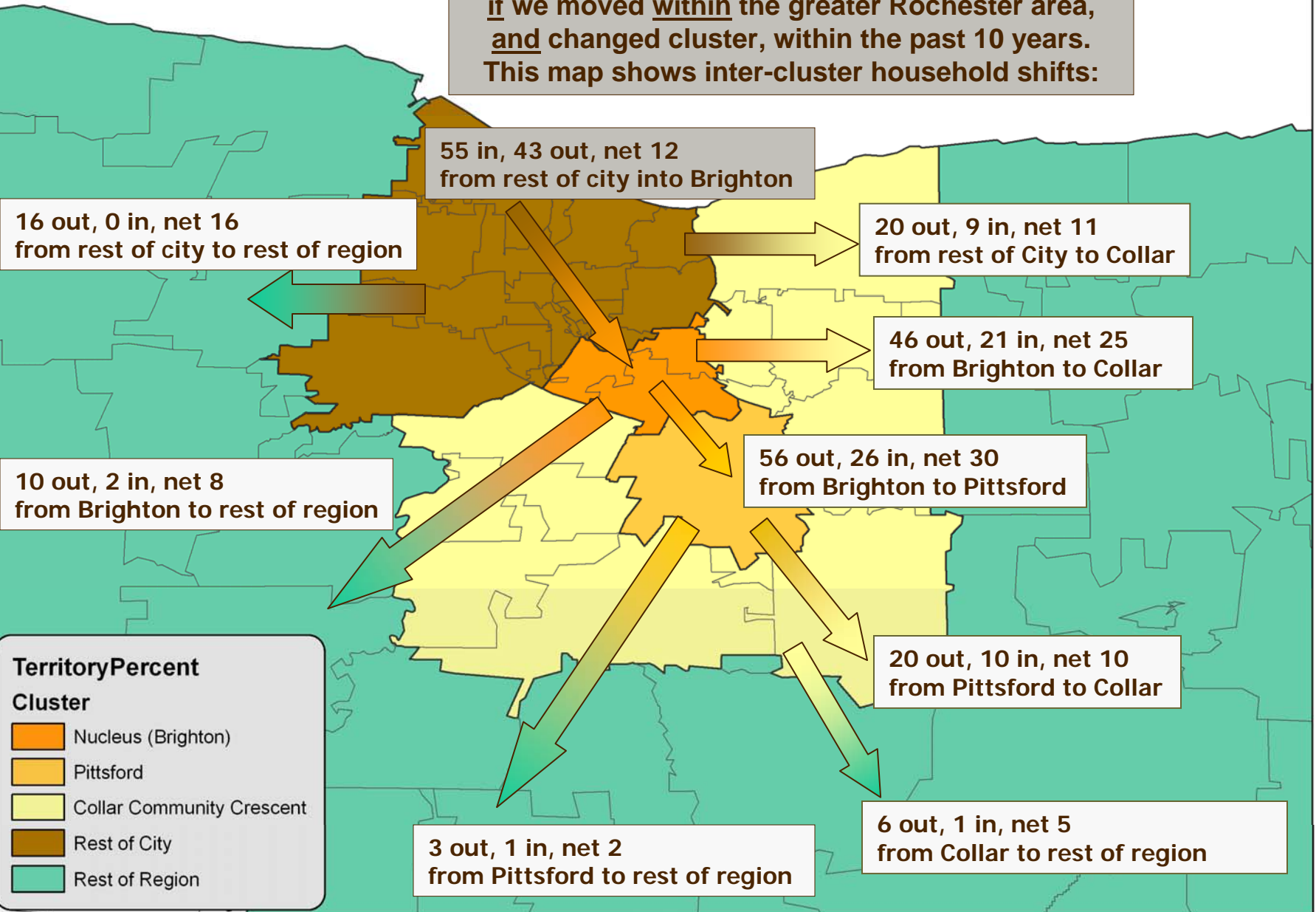
Rest of the Region est. 795 Jews

Community Cluster Key

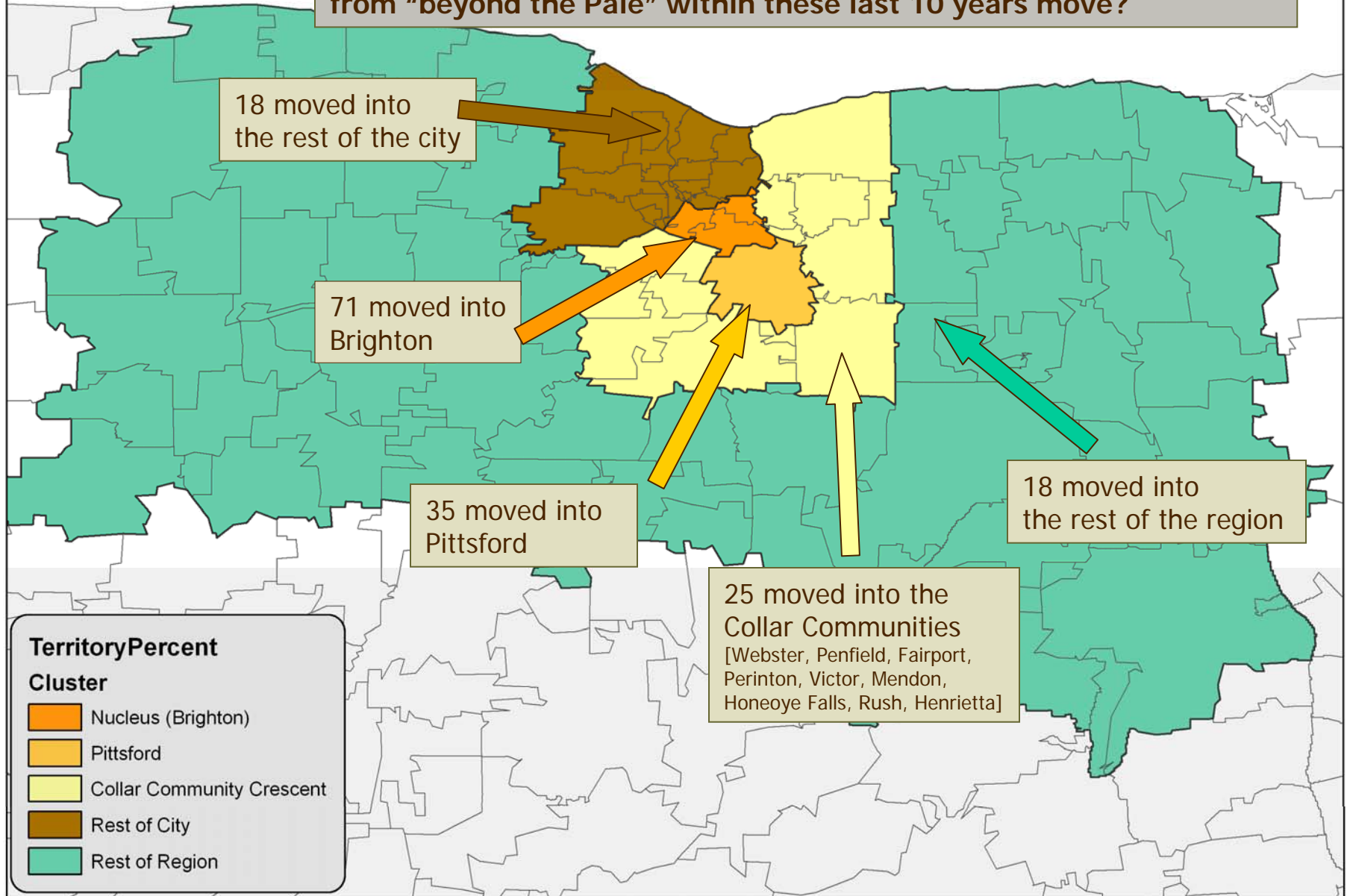
- Nucleus (Brighton)
- Pittsford
- Collar Community Crescent
- Rest of City
- Rest of Region

**What's happened to our Jewish Community
geographically within the past 10 years?**

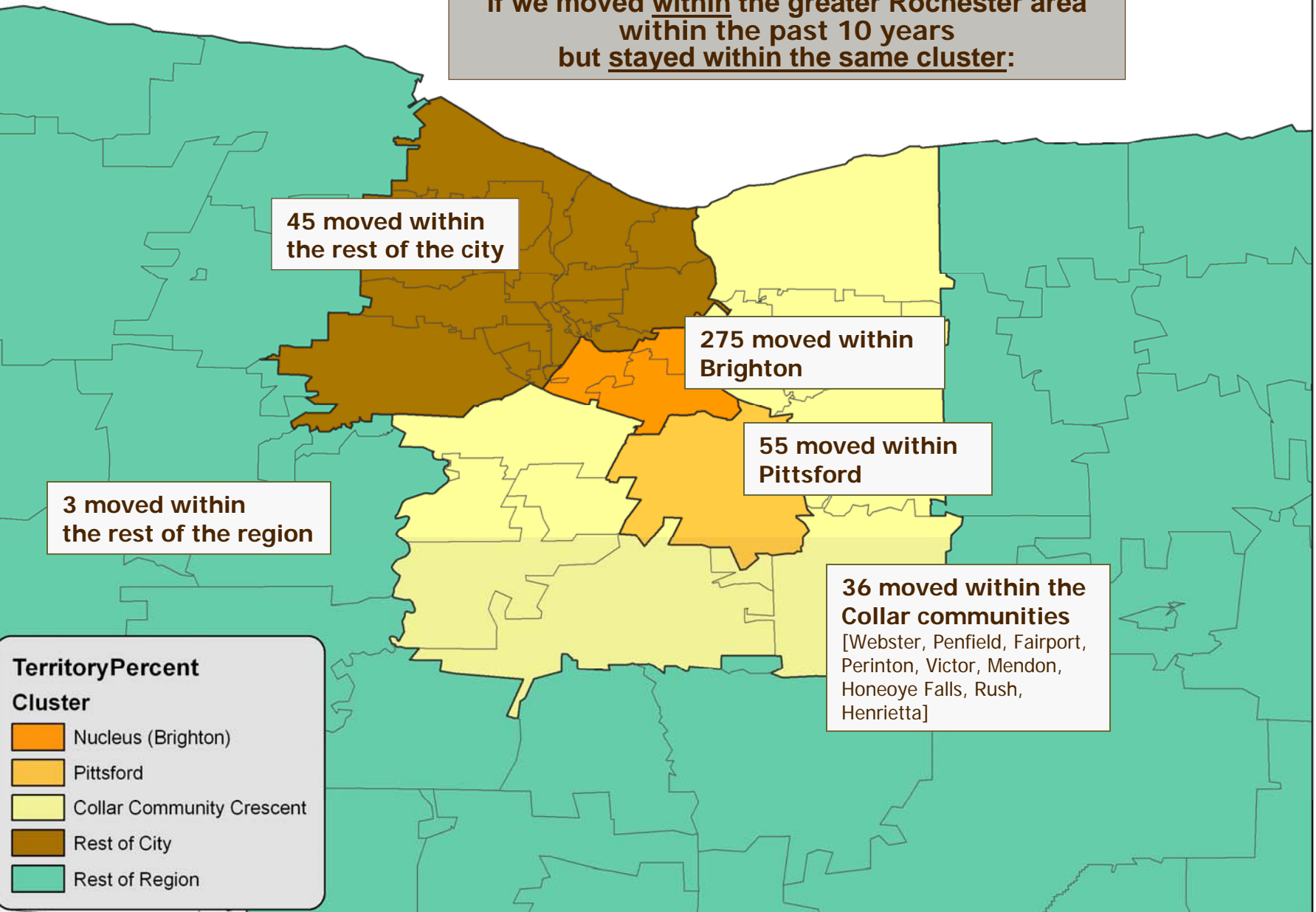
Where we live today (in 2010)
versus where we lived previously,
if we moved within the greater Rochester area,
and changed cluster, within the past 10 years.
This map shows inter-cluster household shifts:



Where we live today (2010):
Into which clusters did those who came into our Jewish Community
from “beyond the Pale” within these last 10 years move?



Where we live today (in 2010)
versus where we lived previously,
if we moved within the greater Rochester area
within the past 10 years
but stayed within the same cluster:



The Rochester Jewish Community's Geography in an Historical Perspective

Where We Lived Historically (1988-->2000-->2010)

In 1988, just over 20 years ago:

Quoting the 2000 study,
in 1988 there were an
estimated:

6,100 Jewish HH
in Brighton (54%)

1,100 Jewish HH
in Pittsford (10%)

4,000 Jewish HH
in the Non-Core (36%)

= 11,200 Jewish HH
in total

Historical Clusters

-  Core (Brighton + Pittsford)
-  Non-Core (All other areas)

Where We Lived Historically (1988-->2000-->2010)

In 2000, ten years ago:

The 2000 study estimated:

4,900 Jewish HH
in Brighton (48%)

1,300 Jewish HH
in Pittsford (13%)

4,000 Jewish HH
in the Non-Core (39%)

= 10,230 Jewish HH
in total

Historical Clusters

- Core (Brighton + Pittsford)
- Non-Core (All other areas)

Where We Lived Historically (1988-->2000-->2010)

In 2010, today:

**Collapsing & consolidating
our five 2010 community
clusters into three for
historical comparability,
today we find:**



**4,965 Jewish HH
in Brighton (51%)**

**1,850 Jewish HH
in Pittsford (19%)**

**2,925 Jewish HH
in the Non-Core (30%)**

9,740 Jewish HH in total

Historical Clusters

-  Core (Brighton + Pittsford)
-  Non-Core (All other areas)

Where We Lived Historically (1988-->2000-->2010)

Historical Perspective

Note: Within the declining "non-core" sector is the "rest of the city", including such zips as the Irondequoit area's 14617, which diminished from 5% of our Jewish households in 2000, to just 2% of our Jewish households today. When consolidated this way for decade-to-decade comparability, this "rest of the city" decline offsets Jewish growth in the eastern collar communities, so the non-core area shows a net decline, while parts of that area [i.e. the collar communities] have in fact grown in Jewish presence this decade.

Historical Clusters

- Core (Brighton + Pittsford)
- Non-Core (All other areas)

Placing the three decades side-by-side, we get this historical perspective:

Brighton =
6,100→4,900→4,965
[54%→48%→51%]

Pittsford =
1,100→1,300→1,850
[10%→13%→19%]

Non-Core =
4,000→4,000→2,925
[36%→39%→30%]

Total # Jewish HH =
11,200→10,230→9,740
[-8.6%] [-4.8%]

Our Jewish Community's Stability Profile

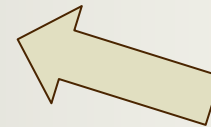
Q41a) Were you born in the greater Rochester area?

Yes = 34%

No = 66%

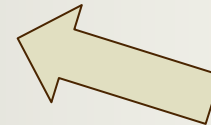
Q42) How many years have you lived in the Rochester area?

Mean average = 28.9 years



Q44a) How many years have you lived at your current address?

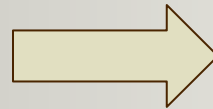
Mean average = 16.1 years



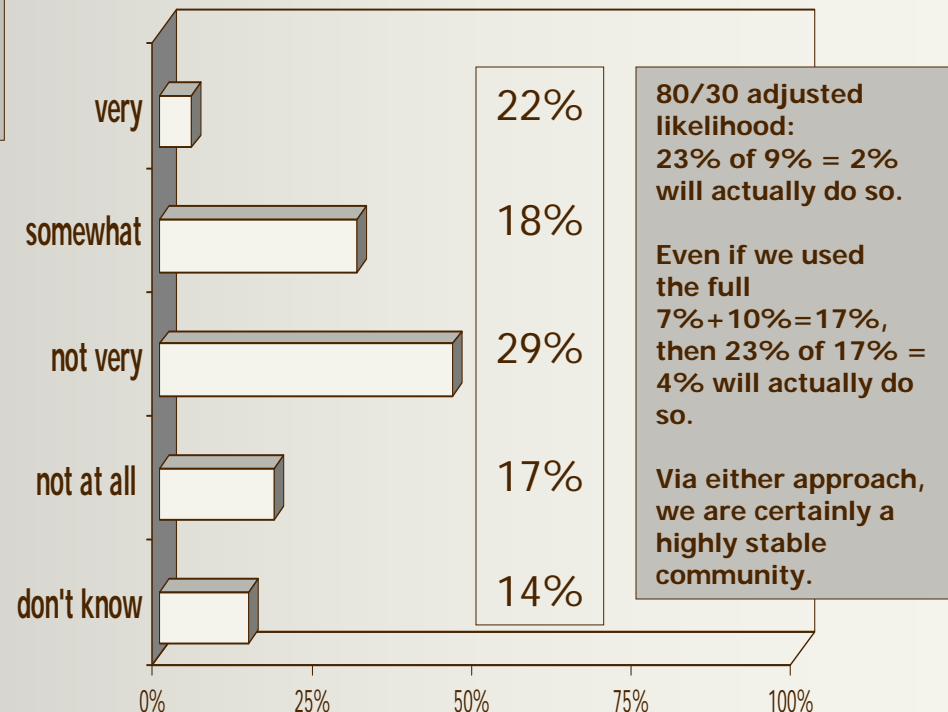
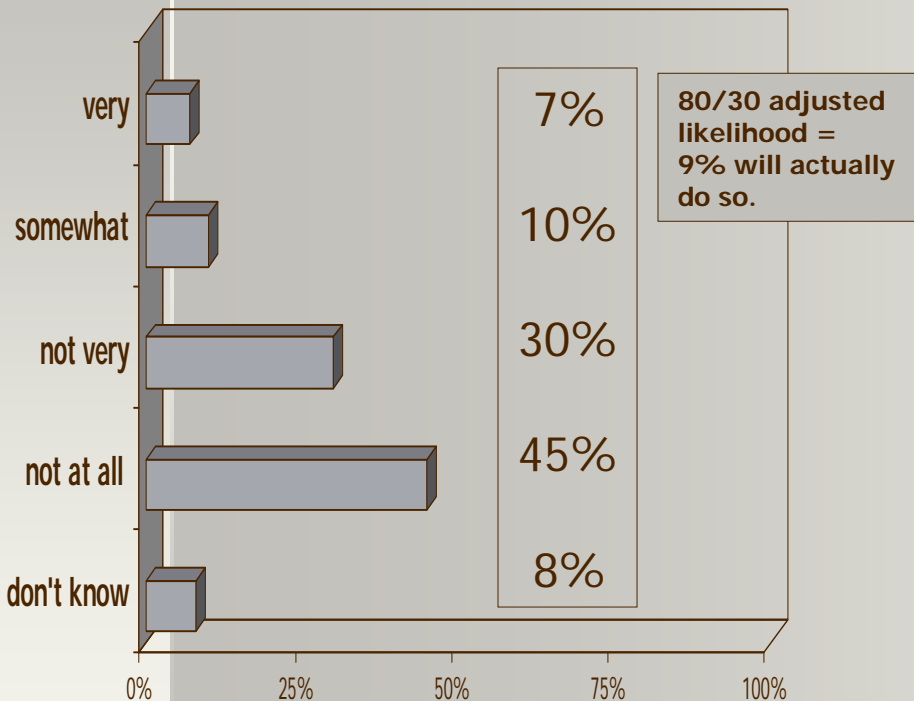
Observation: While only 1 in 3 of us [34%] were born here, we've been here a long time, and tend to stay put. Even when we move, we've tended to remain within the area. On average, we've been here for nearly 30 [28.9] years, and lived at our current addresses for just over 15 [16.1] years, suggesting that on average we've lived in two places within the Rochester area. In other words, we're not a highly transient community – we tend to come, settle, and stay – although on average we move once within the area. Tracking that in-area migration can help us to understand how our Jewish community has been shifting around within its boundaries recently.

Our Jewish Community's Stability Profile

Q46a) How likely are you to move within the coming three years?



Q46b) If you do move within the next few years, how likely are you to leave the Greater Rochester area?

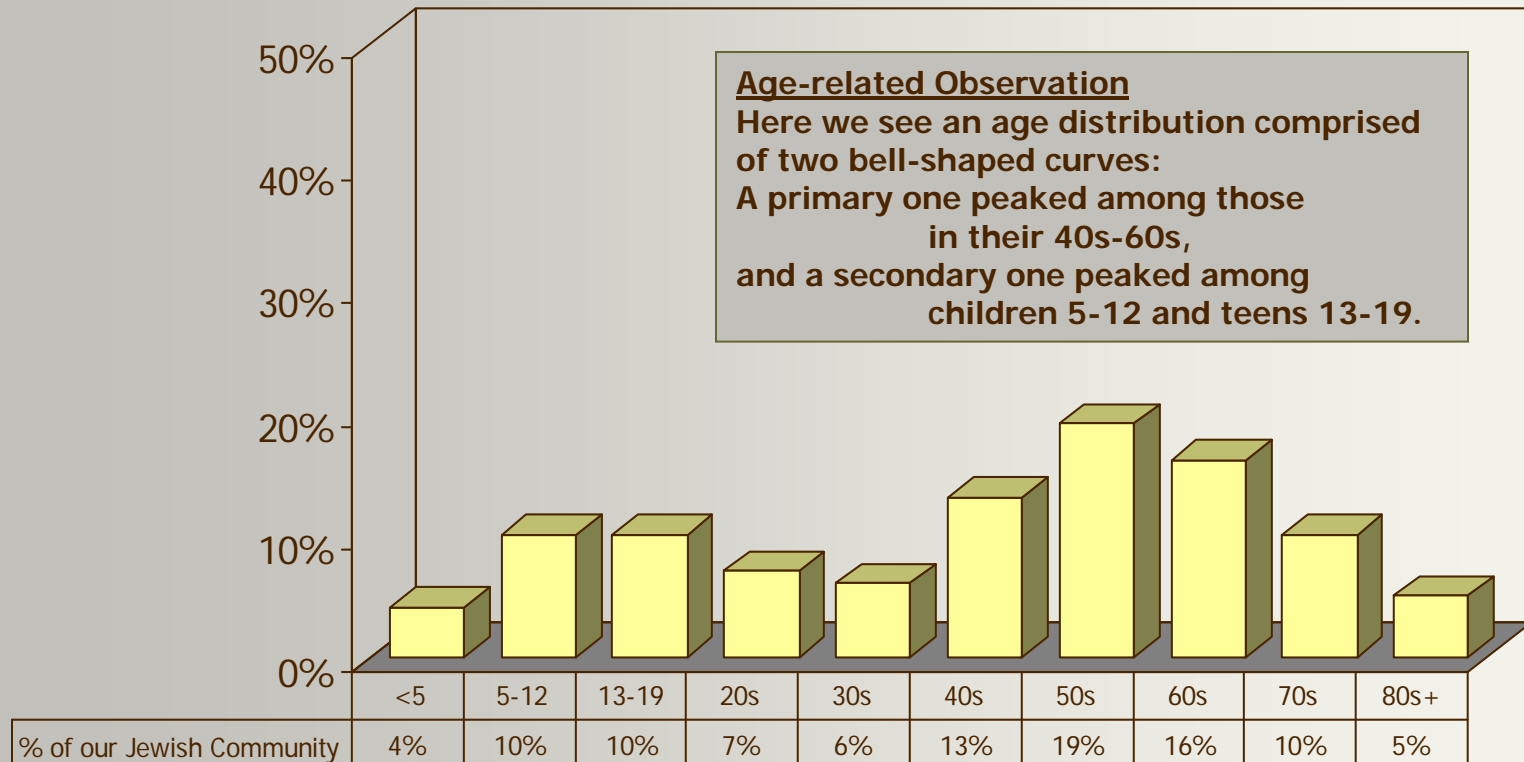


**Demographically,
what do we know about
our Jewish community today?**

Jewish Community Age Profile

Q29b) Within your household, how many people are...

**Estimated number of Jews
within our community's 9,740 Jewish households**

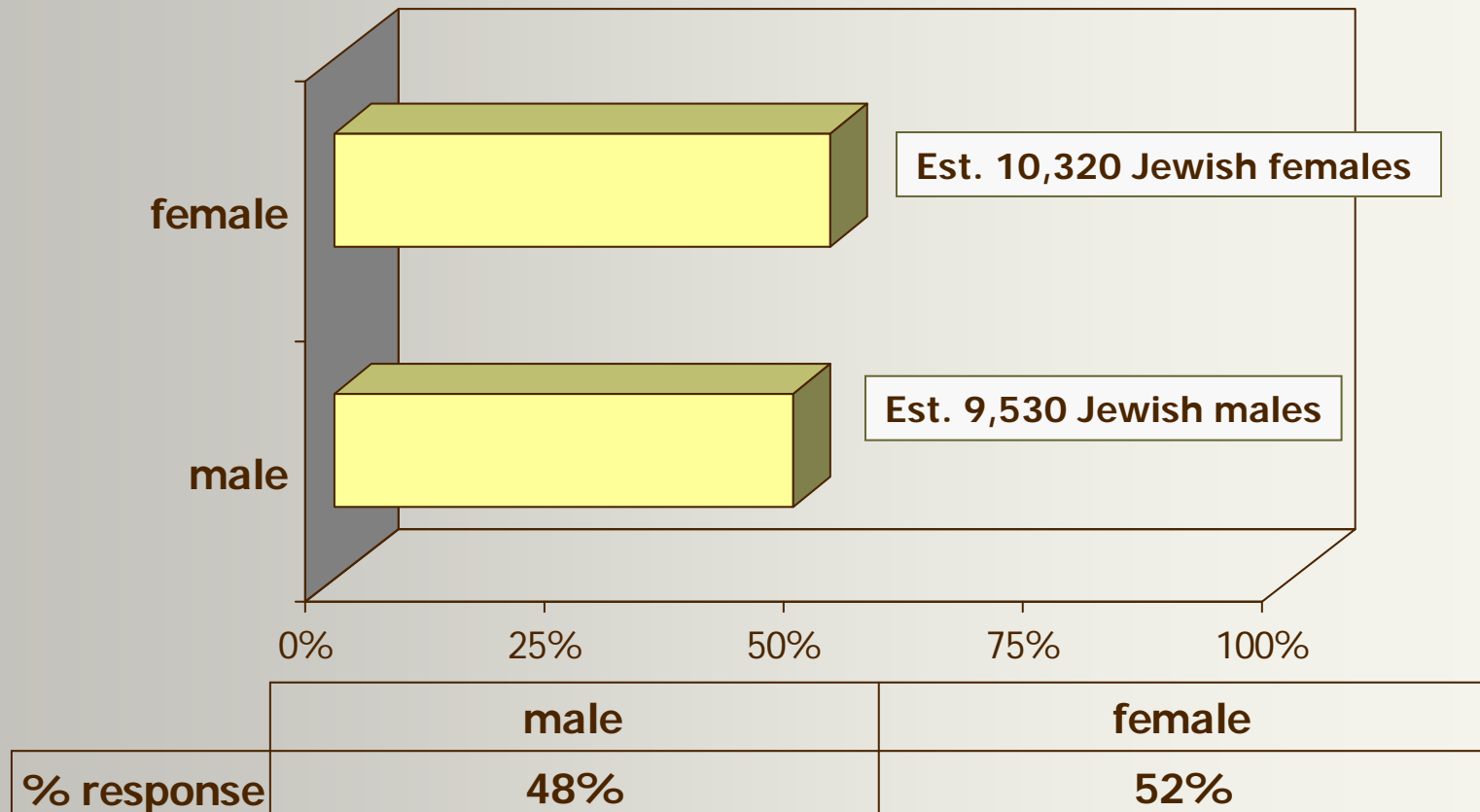


Projected # of Jews	853	1,900	2,053	1,382	1,220	2,523	3,687	3,206	1,990	1,036
[total = 19,850]										

[N=2,234 respondent households]

Jewish Community Gender Profile

Q20) Just a reminder: Your "household" includes those with whom you live today, in your home or apartment. Now within your household, how many people are...

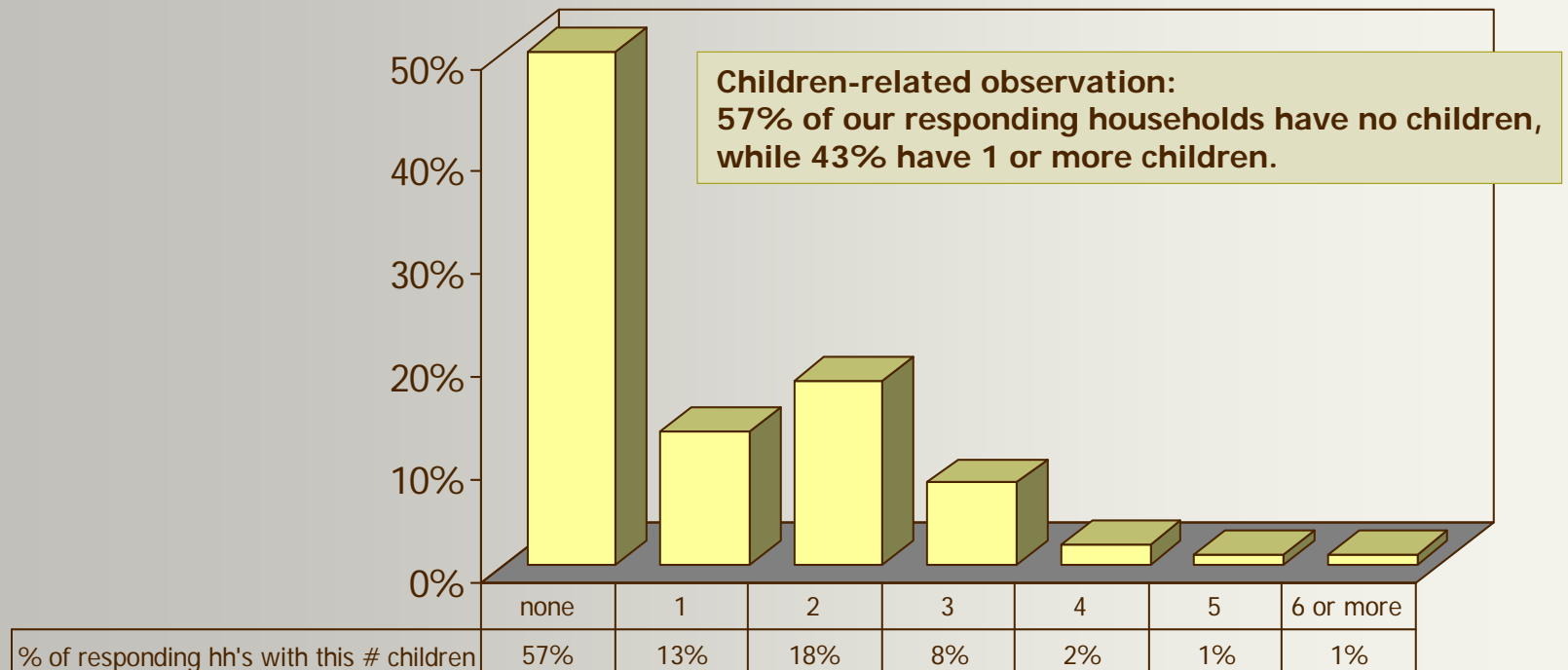


[est. N= 19,850 Jews within our 9,740 Jewish households]

[Note: Within our survey's 2,234 respondents, 3 identified a household member as trans-gender.]

Profile of Our Jewish Children

Q29c) Just for clarification, this household has how many children in total?

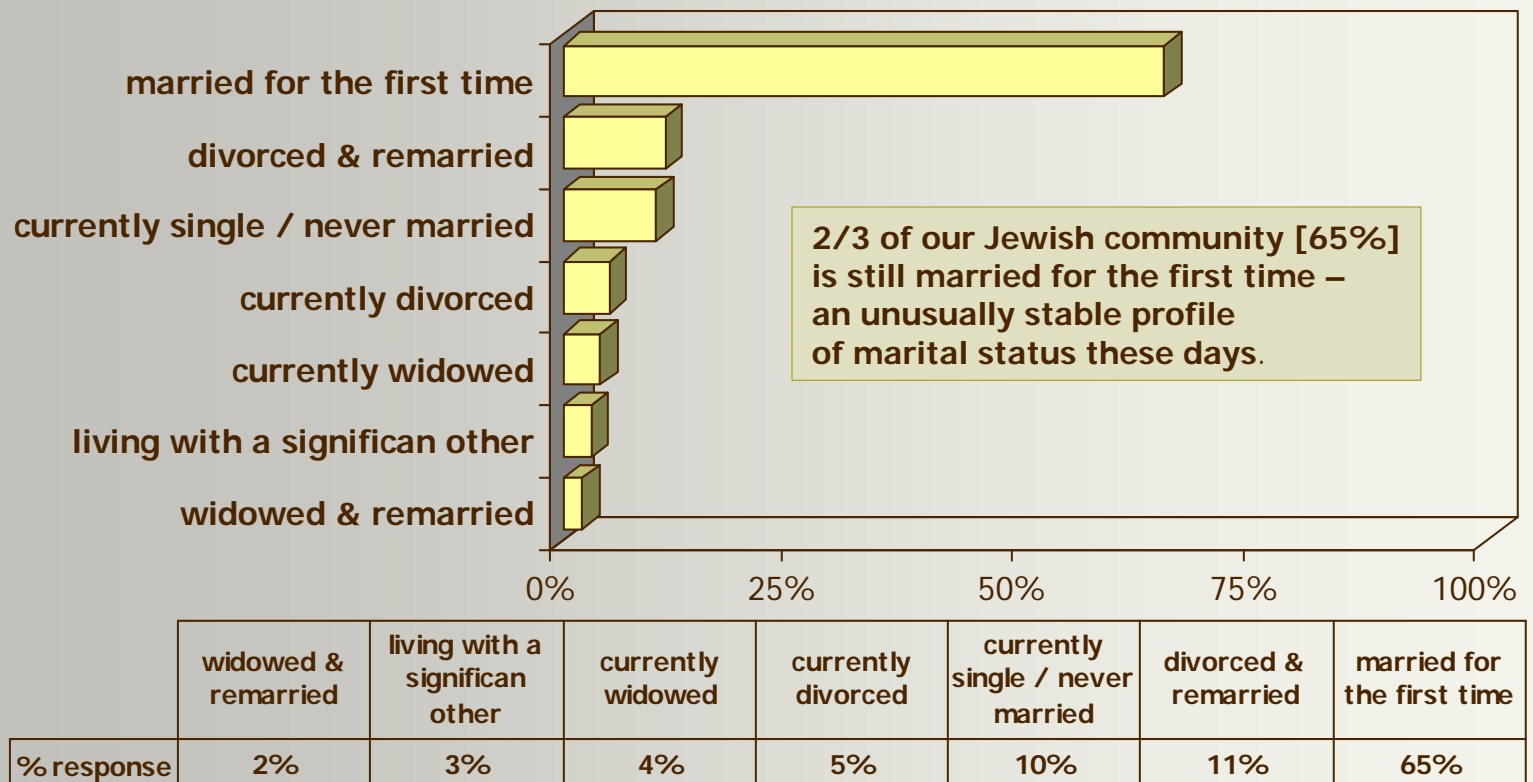


[N=2,234 respondent households]

Note: Q38 finds that 8% of our Jewish community's children are adopted.

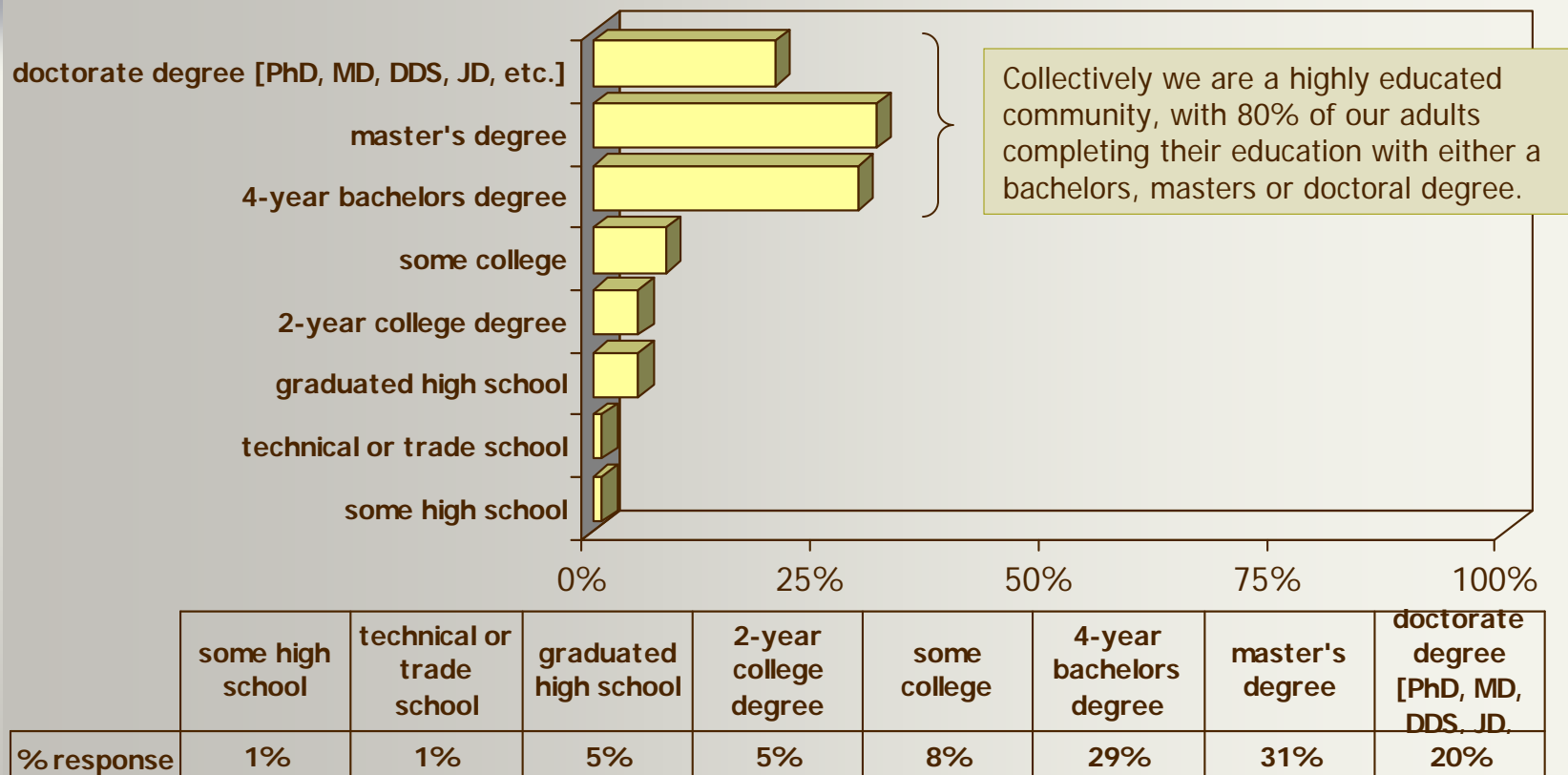
Our Jewish Community's Marital Status Profile

Q32) How many adults in this household are currently...



Our Jewish Community's Educational Profile

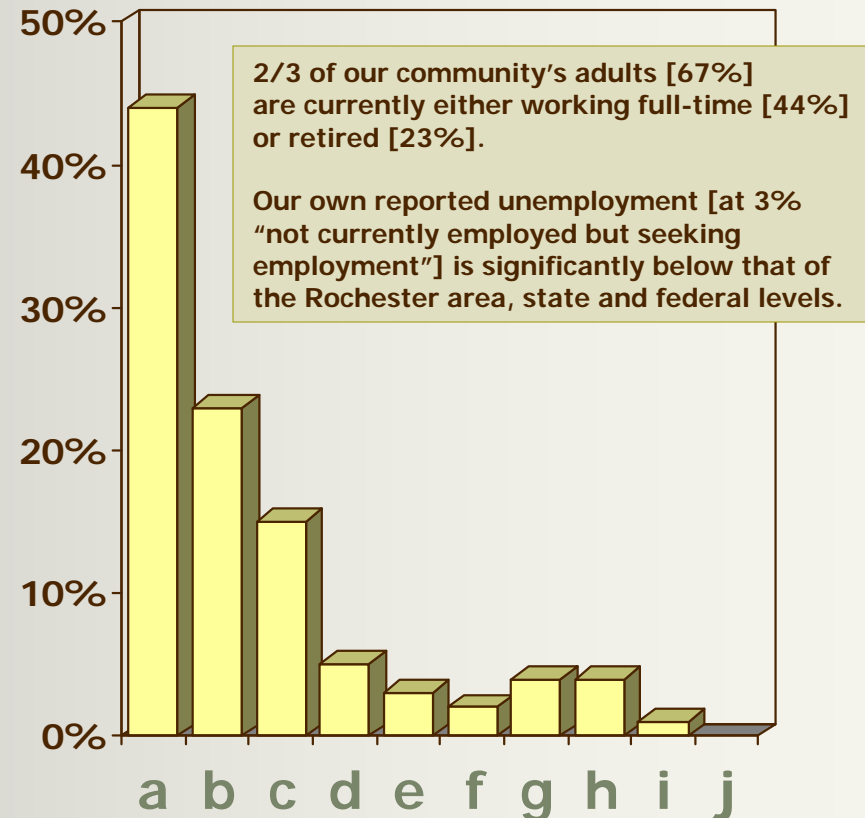
Q36) What was the highest level of education achieved by each of your household's adults [i.e. those who are not still in school]?



Our Jewish Community's Employment Profile

Q35) Within your household,
how many of the adults are...?

- a) Working full-time [44%]
- b) Retired [23%]
- c) Working part-time [15%]
- d) Not employed by choice and not seeking employment [5%]
- e) Unemployed / not currently employed but seeking employment [3%]
- f) Disabled / unable to work [2%]
- g) Full-time students outside the greater Rochester area [4%]
- h) Full-time students within the greater Rochester area [4%]
- i) Part-time students within the greater Rochester area [1%]
- j) Part-time students outside the greater Rochester area [<1%]

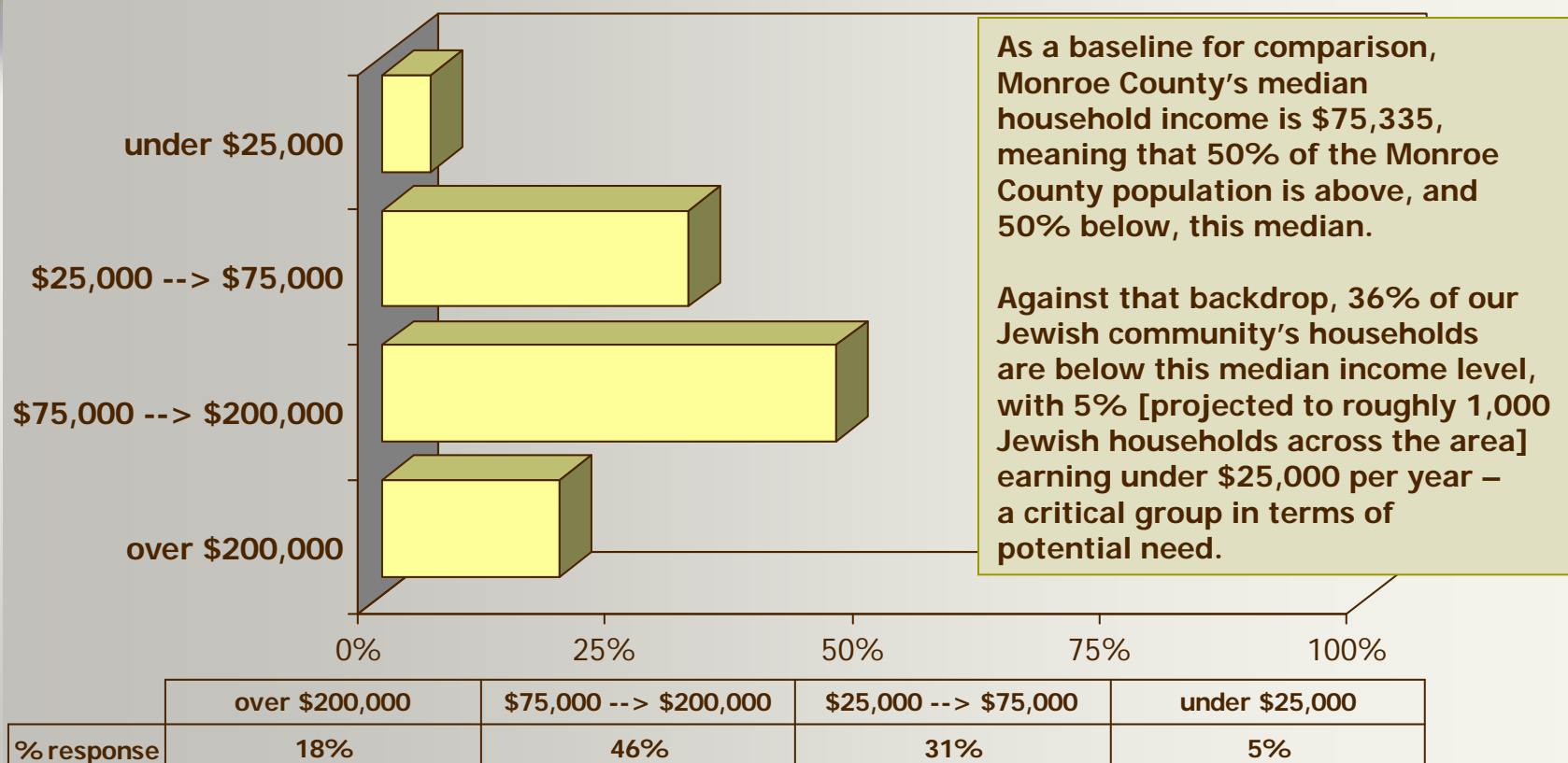


Our Jewish Community's Income Profile

Q144) Last year, was your household's total income over \$75,000?

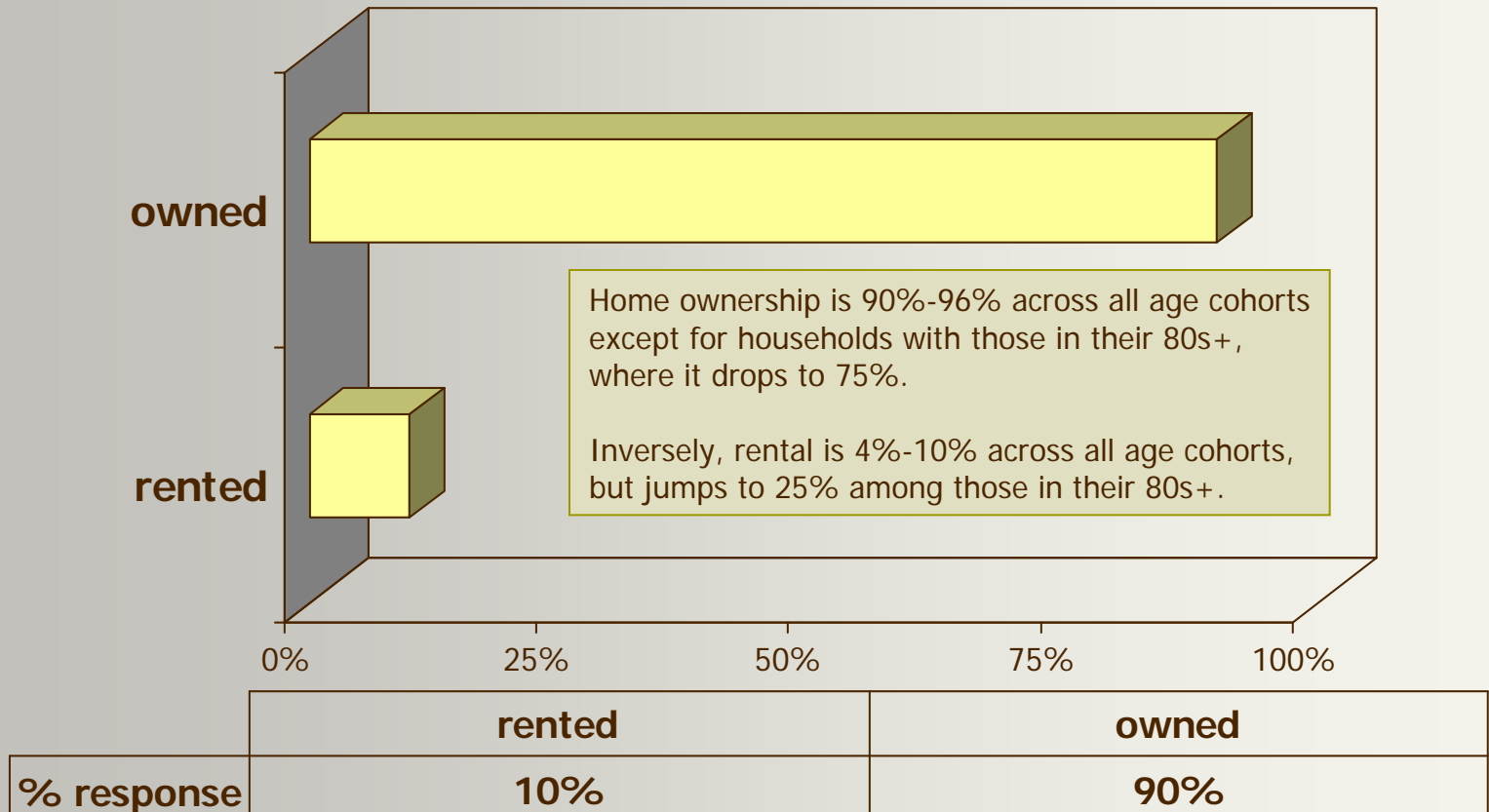
[If yes:] Was it over \$200,000?

[If no:] Was it over \$25,000?



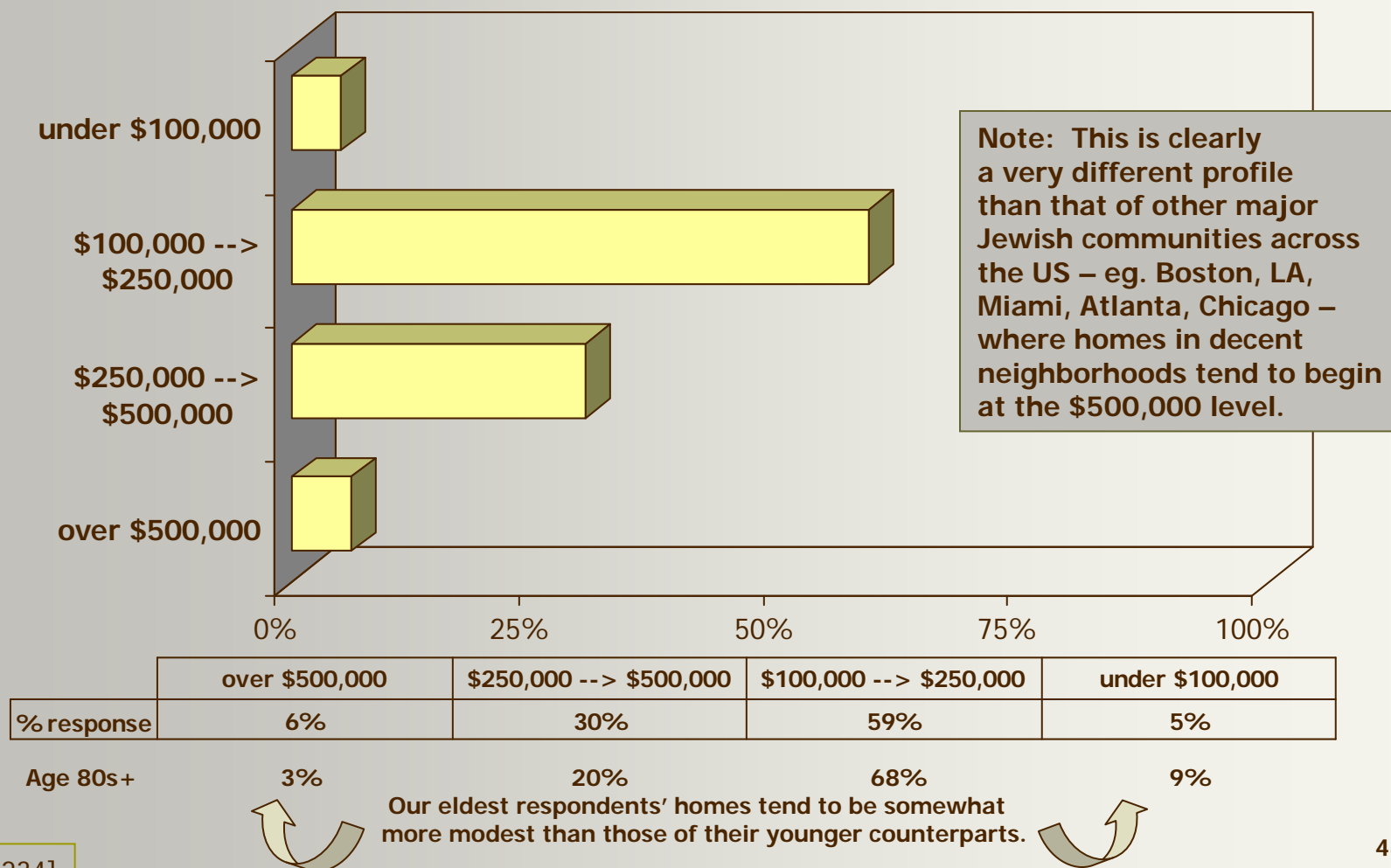
Our Jewish Community's Home Ownership Profile

Q145a) Is your current home owned or rented?



Our Jewish Community's Home Ownership Profile

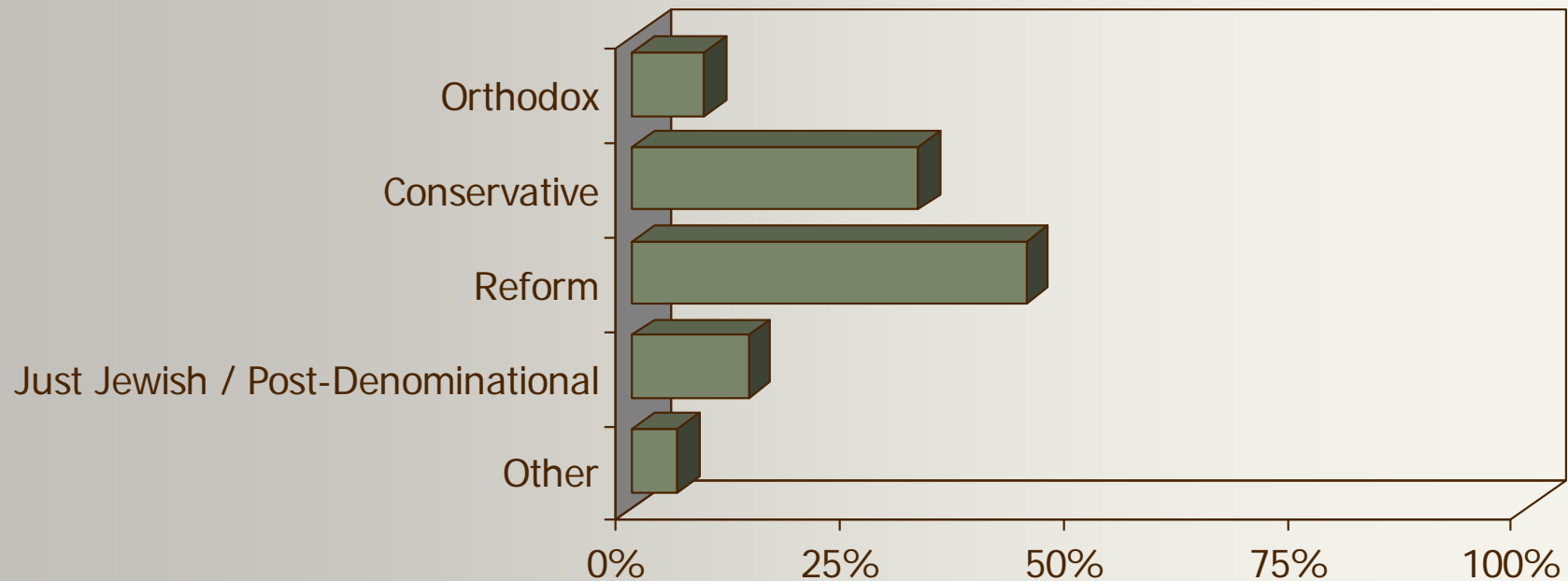
Q145b) [Asked only of those who now own their homes:]
If your Rochester area home were for sale today,
roughly how much do you imagine that it would sell for?



**Religiously,
what do we know about
our Jewish community today?**

Our Jewish Community's Denominational Profile

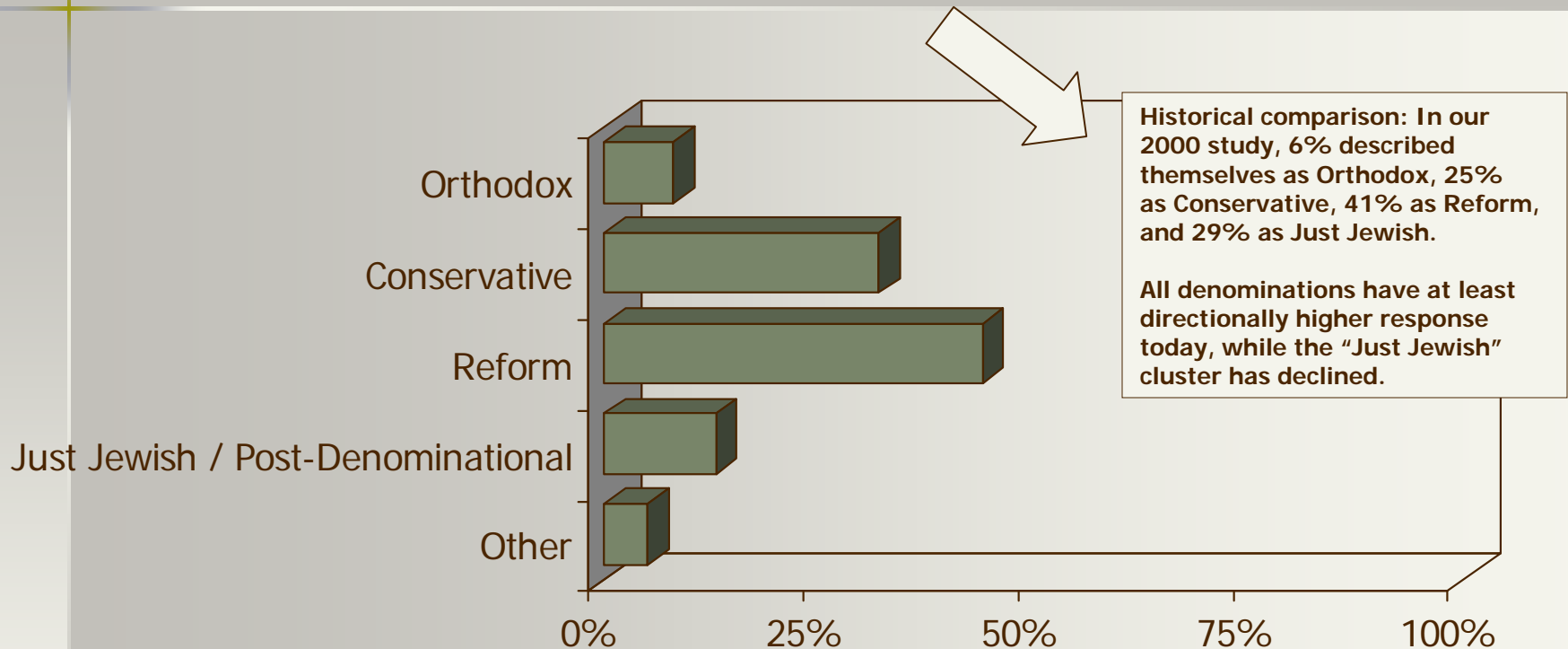
Q90) Which of the following most closely describes how you see yourself today?



	Other	Just Jewish / Post-Denominational	Reform	Conservative	Orthodox
% response	5%	13%	44%	32%	8%

Our Jewish Community's Denominational Profile

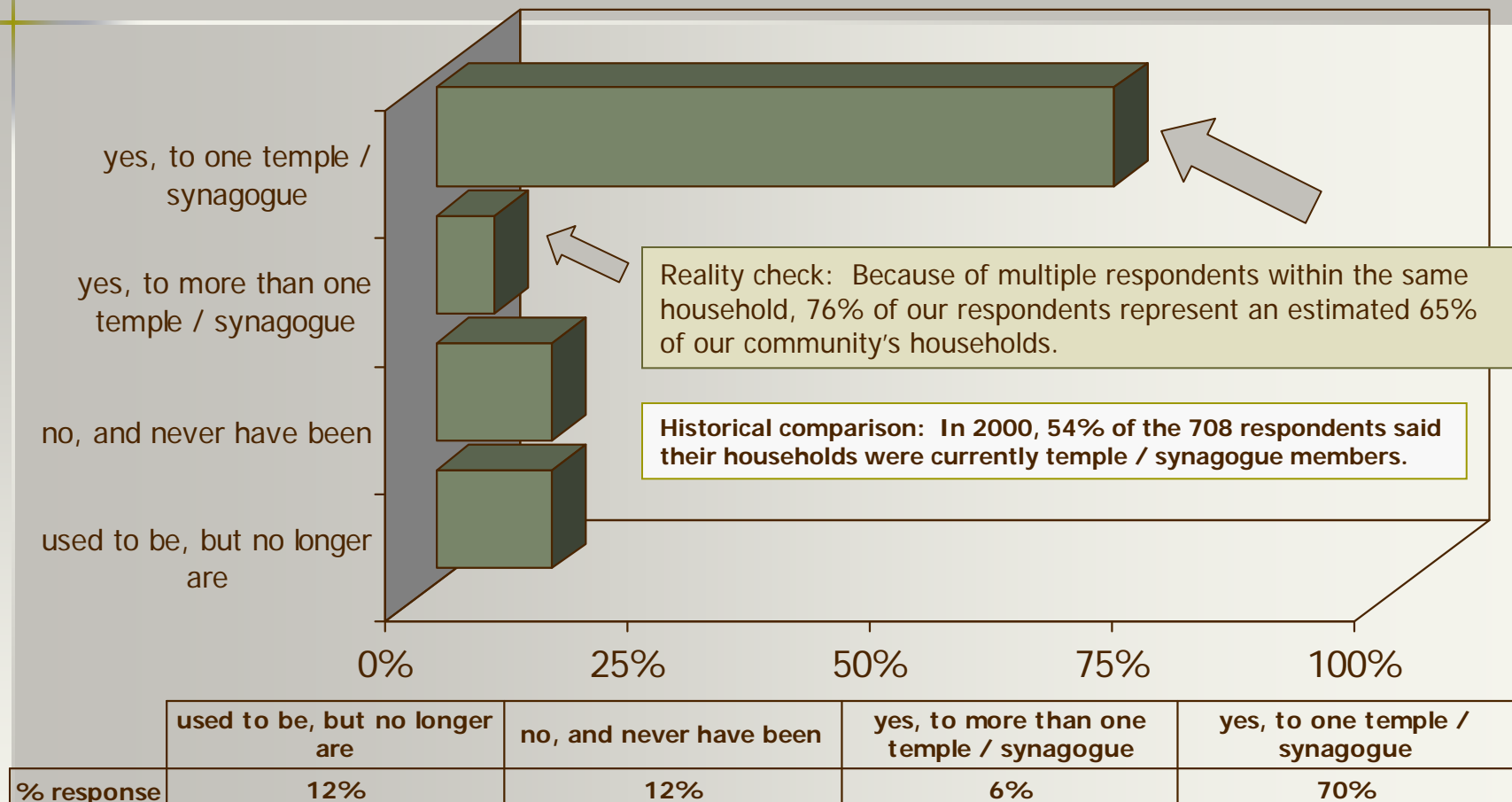
Q90) Which of the following most closely describes how you see yourself today?



	Other	Just Jewish / Post-Denominational	Reform	Conservative	Orthodox
% response	5%	13%	44%	32%	8%

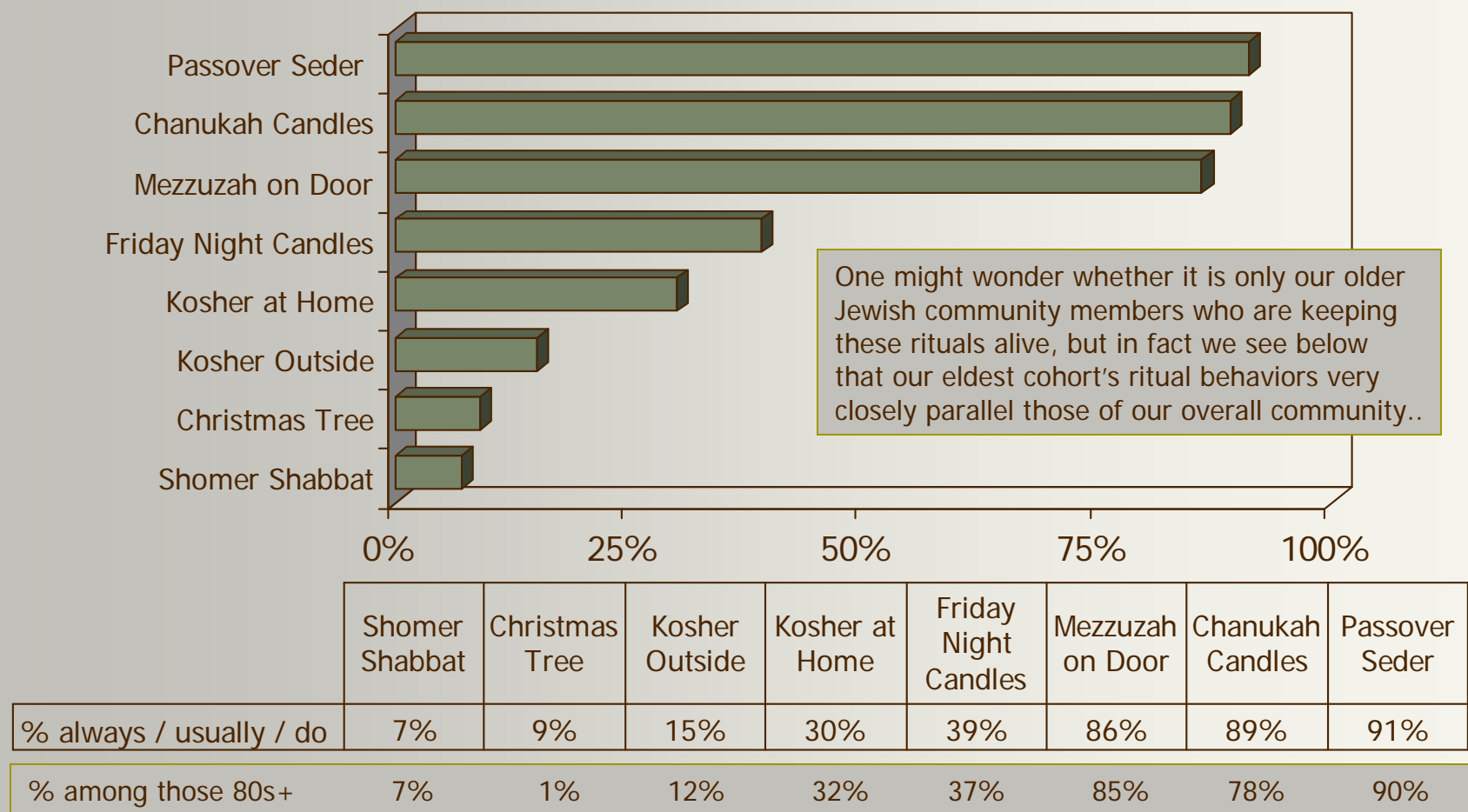
Our Jewish Community's Synagogue Affiliation Profile

Q95a) Is your household currently a dues-paying member of any local temple or synagogue?

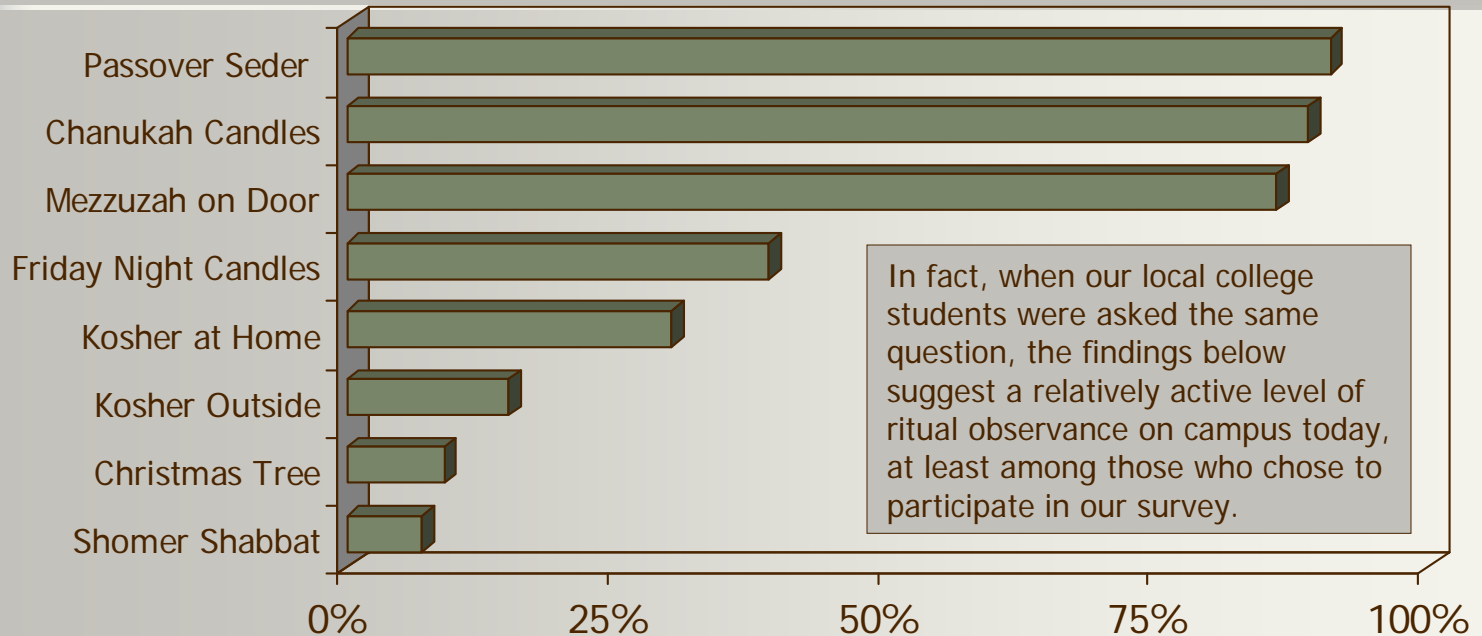


Our Jewish Community's Ritual Observance Profile

Q86) Hierarchy of respondents who
always / usually /do each of the following:



Q86) Hierarchy of respondents who always / usually /do each of the following:

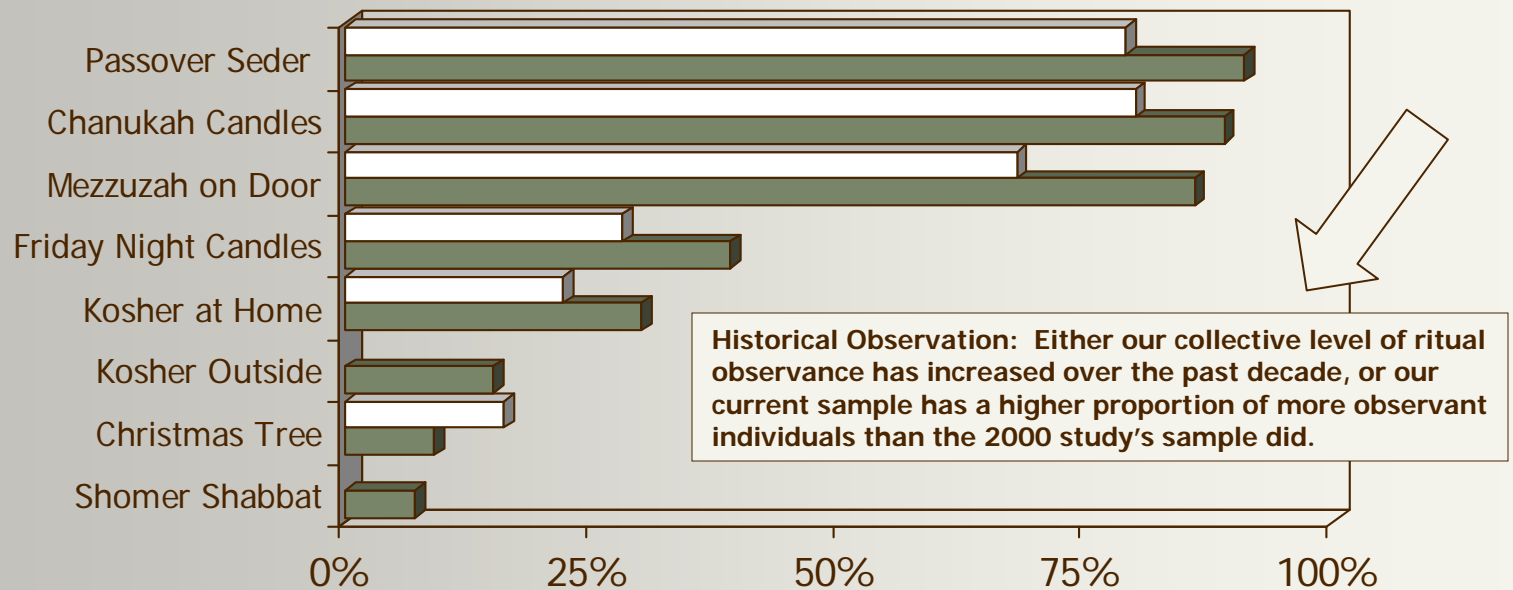


	Shomer Shabbat	Christmas Tree	Kosher Outside	Kosher at Home	Friday Night Candles	Mezzuzah on Door	Chanukah Candles	Passover Seder
% always / usually / do	7%	9%	15%	30%	39%	86%	89%	91%

Local college students [N=100]	NA	6%	35%	40%	35%	NA	87%	92%
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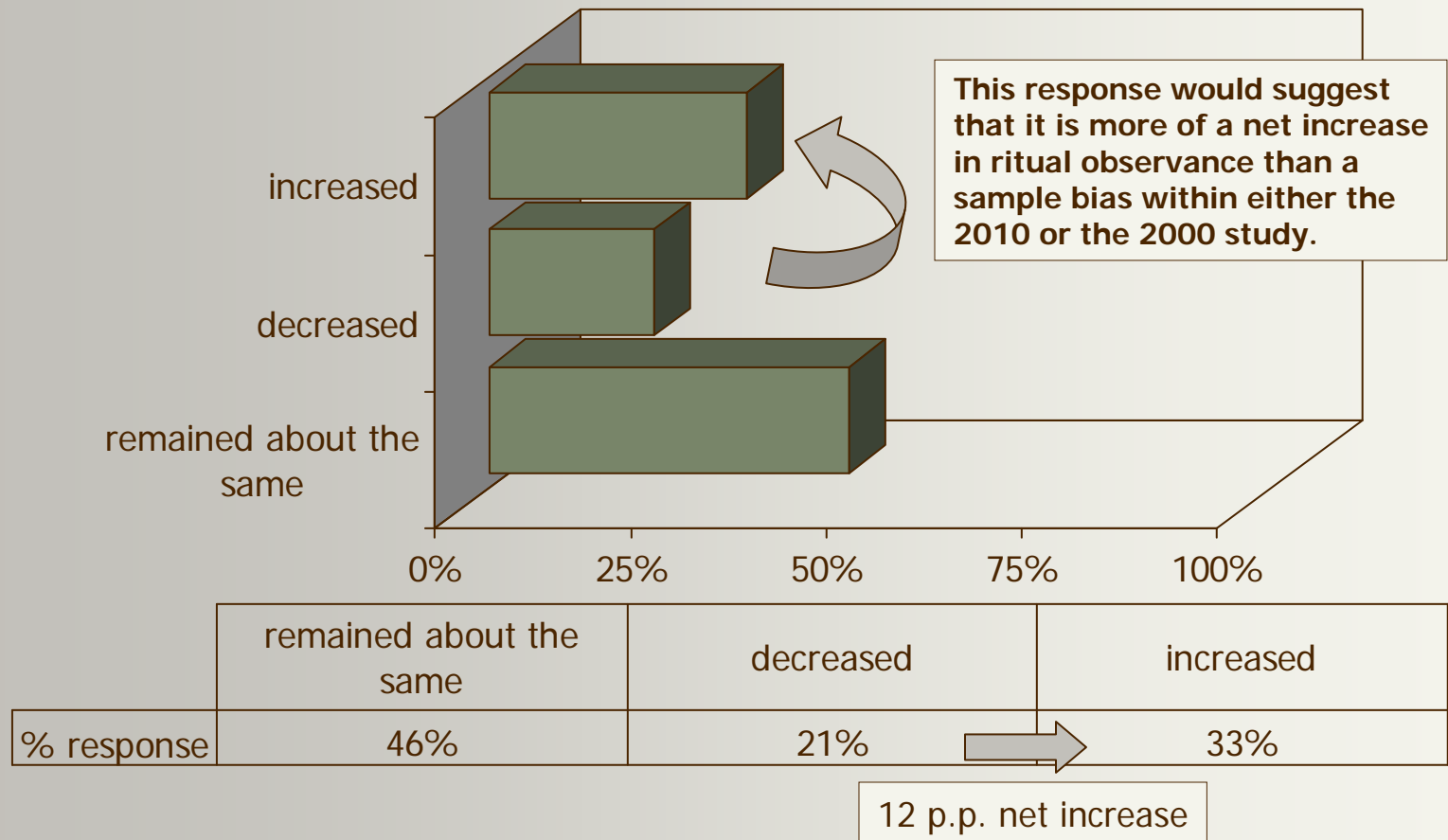
Ritual Observance in Historical Perspective

Q86) Hierarchy of respondents who always / usually / do each of the following:



	Shomer Shabbat	Christmas Tree	Kosher Outside	Kosher at Home	Friday Night Candles	Mezzuzah on Door	Chanukah Candles	Passover Seder
□ 2000 response	not asked	16%	not asked	22%	28%	68%	80%	79%
■ 2010 response	7%	9%	15%	30%	39%	86%	89%	91%

Q93a) All things considered, over time has your level of Jewish ritual observance increased, decreased, or remained about the same?



A PROFILE OF OUR JEWISH COMMUNITY IN TERMS OF MEMBERSHIP, PARTICIPATION, PRACTICE AND TZEDUKKAH

Taken together, the sum total of membership, participation, practice, and tzedukkah included 94% of our 2000 participants, and now includes 99% of our 2010 participants. We were – and we remain – a Jewishly involved community, where the vast majority of Jewish households “do something Jewish” during the course of the year.

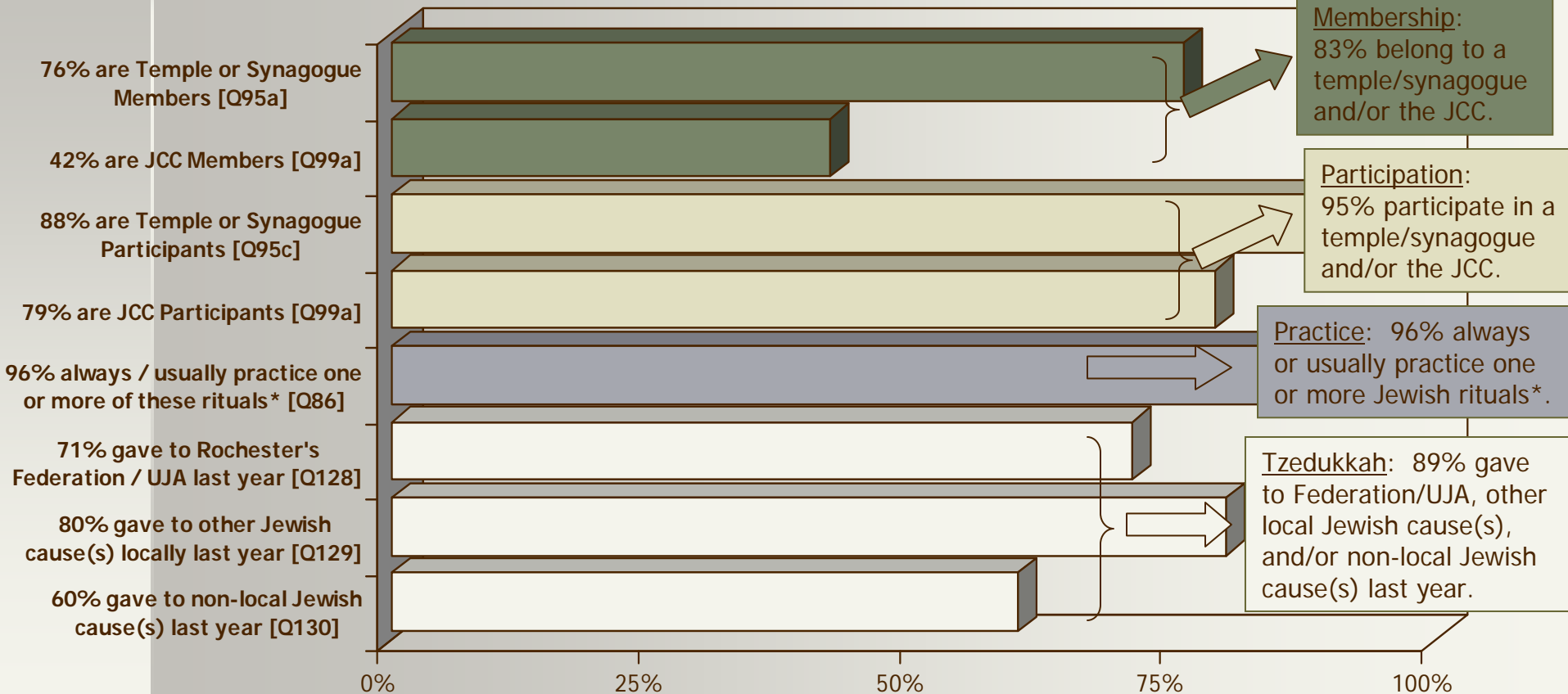
Key Component Cluster

Membership:
83% belong to a temple/synagogue and/or the JCC.

Participation:
95% participate in a temple/synagogue and/or the JCC.

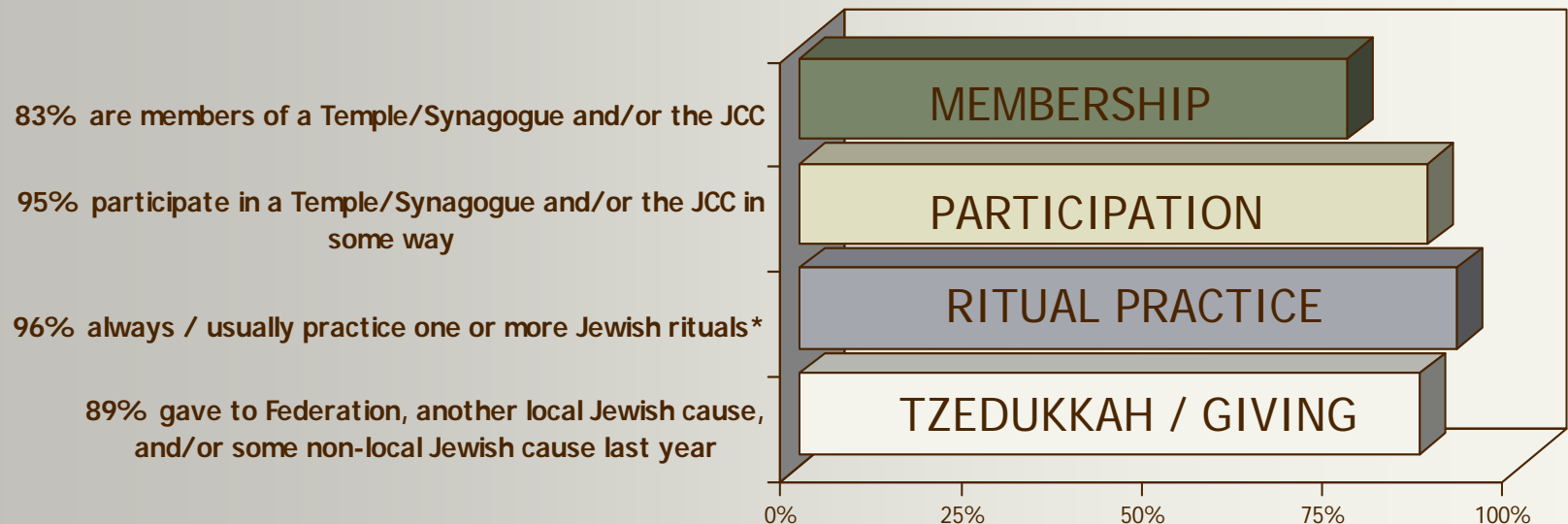
Practice: 96% always or usually practice one or more Jewish rituals*.

Tzedukkah: 89% gave to Federation/UJA, other local Jewish cause(s), and/or non-local Jewish cause(s) last year.



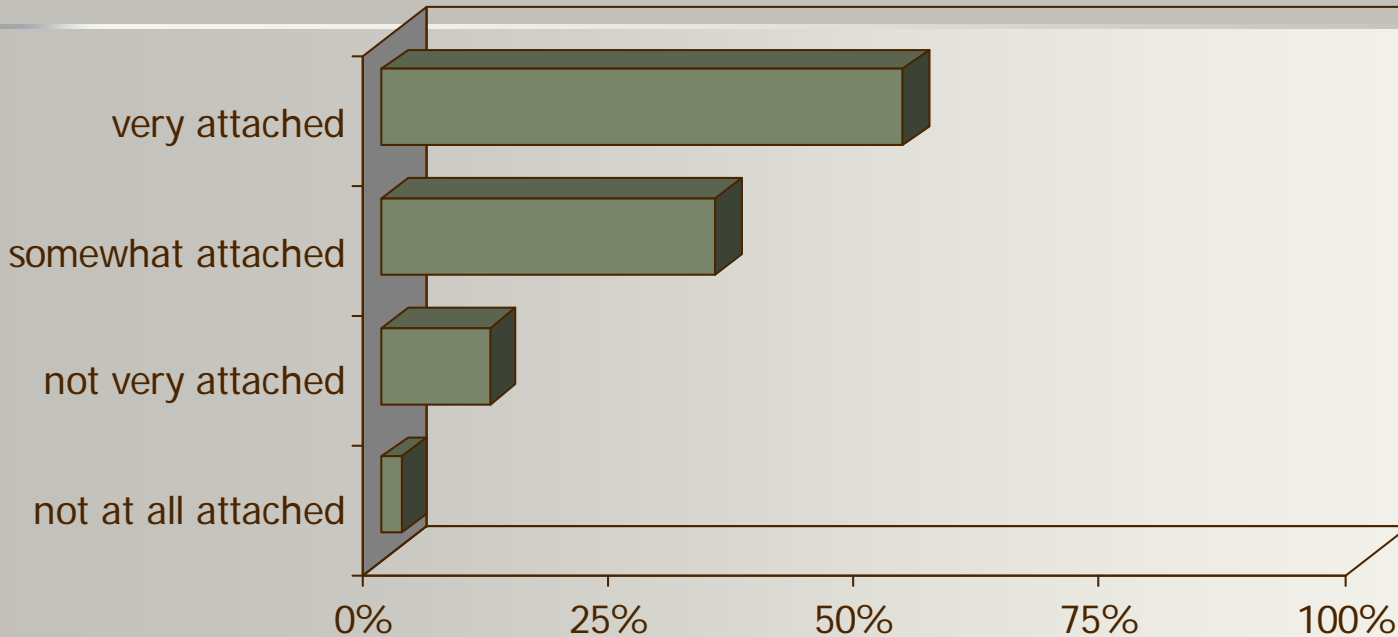
[* attend seder, light Chanukah candles, light Shabbat candles and/or keep Kosher]

A PROFILE OF OUR JEWISH COMMUNITY IN TERMS OF MEMBERSHIP, PARTICIPATION, PRACTICE AND TZEDUKKAH



Taken together, the sum total of membership, participation, practice, and tzedukkah included 94% of our 2000 participants, and now includes 99% of our 2010 participants. We were – and we remain – a Jewishly involved community, where the vast majority of Jewish households “do something Jewish” during the course of the year.

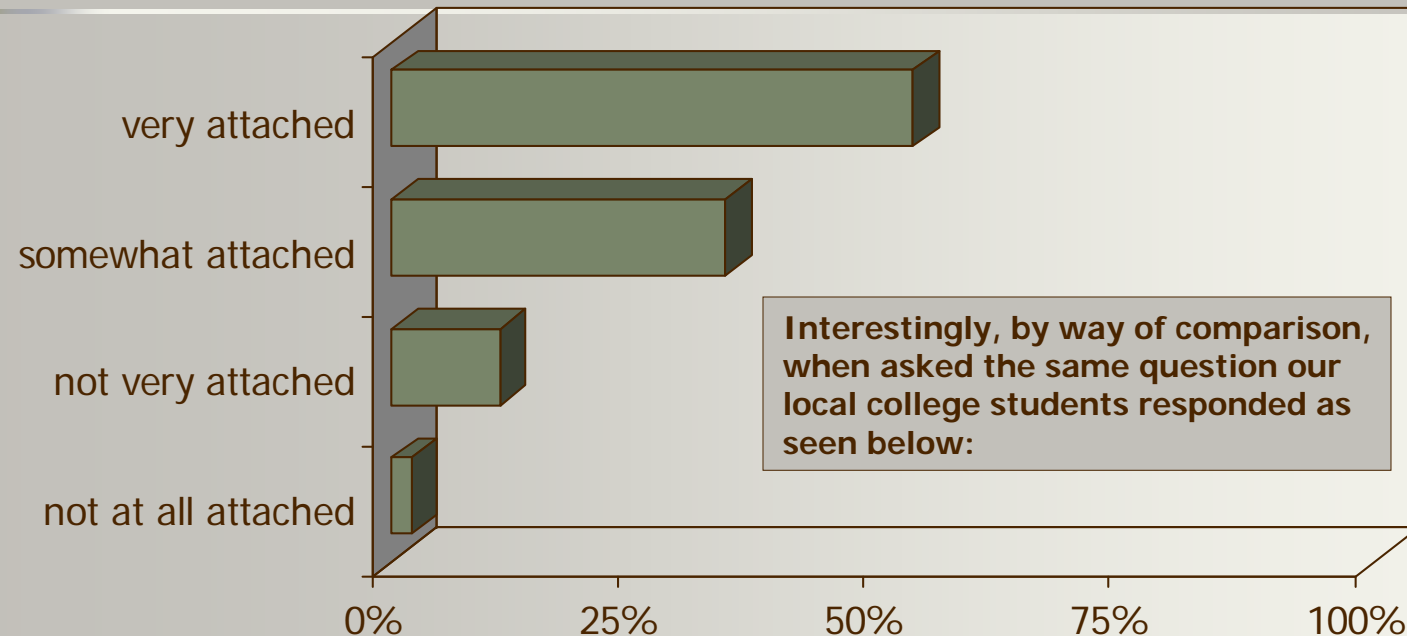
Q114) How emotionally attached to Israel do you feel?



	not at all attached	not very attached	somewhat attached	very attached
% response	2%	11%	34%	53%

In the 2000 study, by way of historical comparison, 12% said "extremely attached", 25% "very attached", 45% "somewhat attached", and 17% "not attached".
[p.403]

Q114) How emotionally attached to Israel do you feel?



	not at all attached	not very attached	somewhat attached	very attached
% response	2%	11%	34%	53%

College student response

[N=100]:

1%

8%

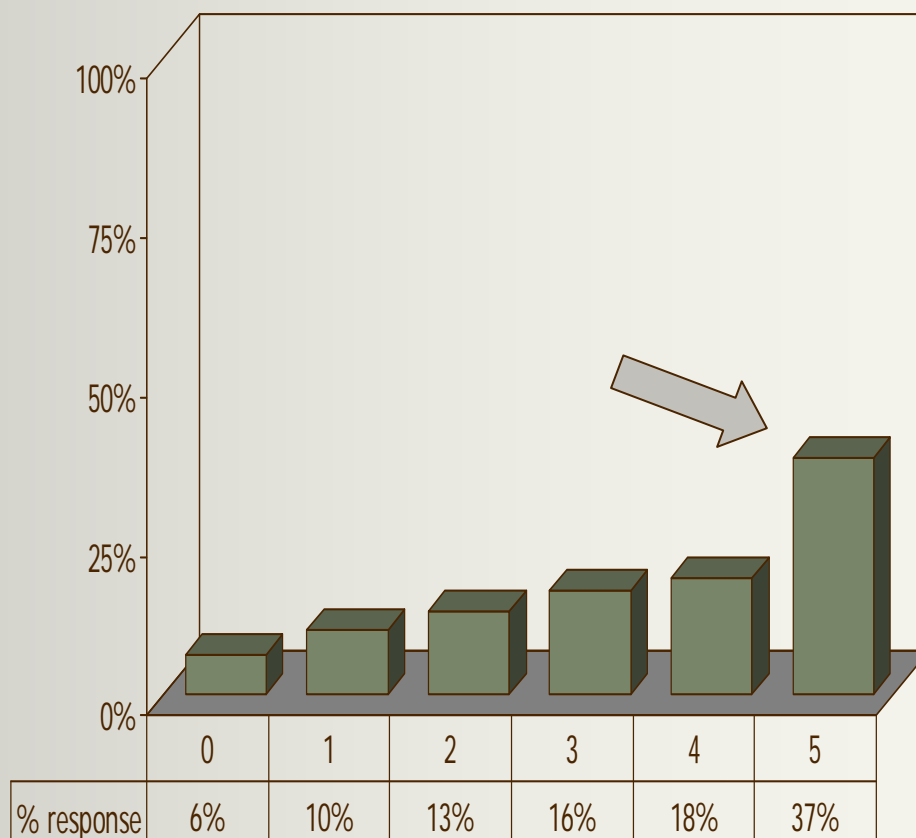
51%

40%

Q94) Of your five closest friends today, how many are Jewish?

Observation:

- Our overall mean average respondent has 3.41 Jewish friends.
- However, this is a factor which varies significantly with respondent age, and also with geography. It varies with denomination, and with several other dimensions, as shown on the slides which follow.
- Note that this measure is not a value judgment – i.e. more is not necessarily better or worse – but an interesting sociological finding because of its close correlation across factors.



Q94) Of your five closest friends today, how many are Jewish?

It's fascinating to see how these 0-5 means vary significantly by respondent segment:

	0-5 Mean
Overall mean [N=2,056]	3.47
Orthodox [N=163]	4.36
Conservative [N=665]	3.74
Reform [N=908]	3.41
Just Jewish / Post-Denominational [N=276]	3.05
Interfaith Household [N=334]	2.75
Non Interfaith Household [N=1722]	3.69
Synagogue Non-Member [N=484]	2.85
Synagogue Member [N=1571]	3.75
Federation Non-Donor [N=562]	2.92
Federation Donor [N=1374]	3.78
Non-Affiliated [i.e. Synagogue Non-Member and Federation Non-Donor] [N=204]	2.44
Affiliated [i.e. Synagogue Member and/or Federation Donor] [N=1822]	3.65
JCC Non-Member [N=1192]	3.32
JCC Member [N=852]	3.75

table continues on following slide...

Q94) Of your five closest friends today, how many are Jewish? (continued)

It's fascinating to see how these 0-5 means vary significantly by respondent segment:

	0-5 Mean	
	Overall mean [N=2,056]	3.47
{	Nucleus [N=1044]	3.72
	Pittsford [N=390]	3.72
	Collar Communities [N=304]	3.21
	Rest of City, 146... [N=193]	3.00
	Rest of Region, 145... 144... [N=103]	2.76
{	Never been to Israel [N=522]	2.94
	Been to Israel [N=1444]	3.74
{	Never been to Jewish Camp [N=437]	3.06
	Been to Jewish Camp [N=1619]	3.62
{	Respondents in their 80s+ [N=152]	4.03
	Respondents in their 70s [N=294]	3.93
	Respondents in their 60s [N=480]	3.61
	Respondents in their 50s [N=537]	3.44
	Respondents in their 40s [N=345]	3.27
	Respondents in their 30s [N=178]	3.12
	Respondents in their 20s [N=64]	2.94

Q94) Of your five closest friends today, how many are Jewish?

Observations:

This is an extremely interesting dimension that varies significantly across respondents segments.

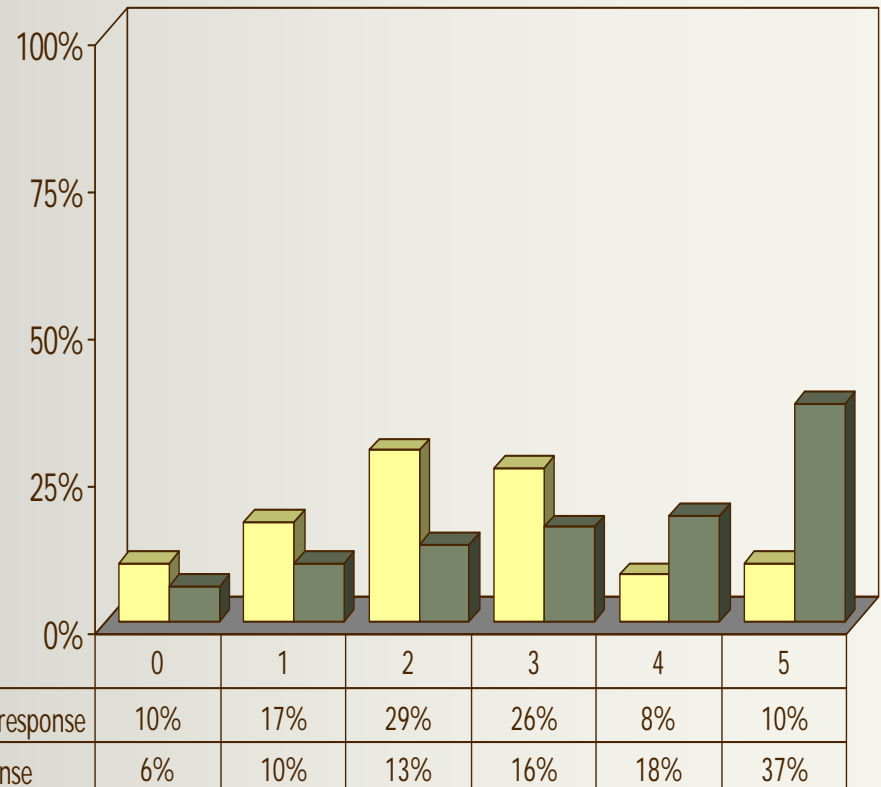
- The older you are, the more of your friends are Jewish. [This trend progresses directly down through the decades.]
- You have a significantly higher proportion of Jewish friends if you
 - **have been to a Jewish summer camp**
 - **have been to Israel**
 - **belong to a temple/synagogue**
 - **belong to the JCC**
 - **donate to Federation.**
- Geographically, more of your friends are Jewish if you live in Brighton [14618, 14610, or 14620] or in Pittsford [14534], and as you get further away [→ collar communities → rest of the city → rest of the region] the fewer Jewish friends you are apt to have.
- Your proportion of Jewish friends declines across denomination [Orthodox → Conservative → Reform → Just Jewish / Post Denominational].
- Those who are intermarried have fewer Jewish friends than those who are not.

While all of the above might seem to be reasonable, intuitive, and even predictable, we now have insight based on clear hard data to confirm what would otherwise have merely been assumptions and best guesses.

Q94) Of your five closest friends today, how many are Jewish? [layering in the college student response]

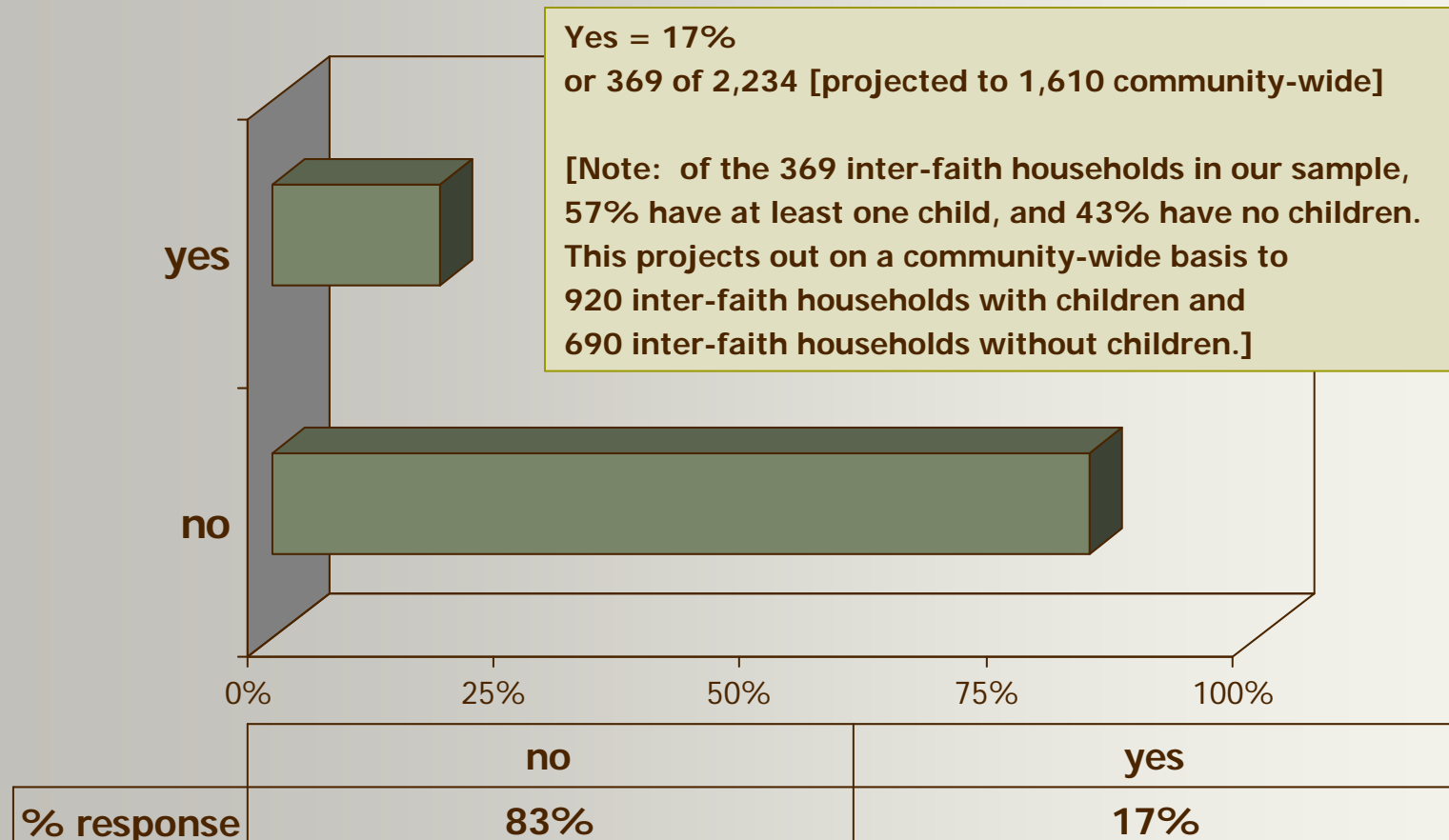
Observation:

- Our overall mean average respondent has 3.41 Jewish friends.
- By way of comparison, our mean average local college student has 2.35 Jewish friends.
- Except for age, they tend to fit all of the highest propensity segments [eg. Jewish camping, been to Israel, synagogue membership, denomination, etc.] yet their mean average number of Jewish friends is lower than we might have anticipated against the backdrop of the trends shown on the prior two slides.

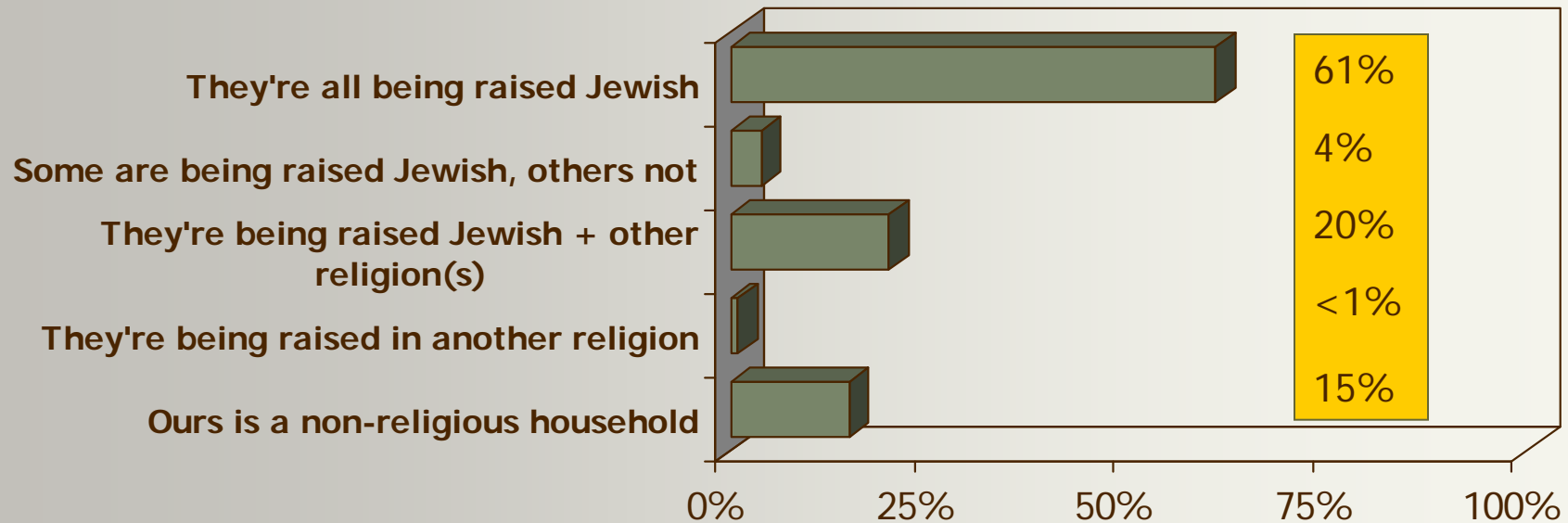


Our Interfaith Households and their Children

Q33a) Is this an inter-faith household?



**Q33b) [For interfaith households with at least one child:]
Are the children in this household being raised Jewish?**



A Methodological Note about our 2010 versus 2000 Comparisons

- The telephone-based 2000 study's 708 total respondents were attained via 213 RDD [random-digit-dialing] calls and 495 DJN [distinctively Jewish names] calls.
- Our 2010 study's 2,334 total respondents were attained by widely publicizing the survey, and welcoming all of our community's Jews to participate. The word was spread widely across the mainstream (i.e. secular) media -- but the temples, synagogues, and other Jewish agencies and organizations certainly took an active role in helping to encourage participation as well.
- Might we, as a result of this approach, have ended up with a higher proportion of affiliated Jews than we did in 2000? We probably did. By opening the survey's gates to all who chose to enter, we have over three times as many total participants, and those most involved Jewishly were most apt to take part.
- Yet the fact remains that within this year's sample we also have significantly more non-affiliated participants than we did in 2000.
- In terms of synagogue membership, for example:

	<u>total N</u> [# people interviewed]		<u>Not A Synagogue Member, and Never Have Been</u>
2000	708	23%	163 respondents
2010	2.234	12%	268 respondents






A Methodological Note about our 2010 versus 2000 Comparisons (continued)

- Let's look at inter-married respondents as another example. The 2000 study projected
62% in-marriage [2 born Jews]
8% conversionary in-marriage [1 born Jew, 1 convert]
30% inter-married [1 born Jew, 1 non-Jew]

In that 2000 study, the sample contained 30% of 480 = 144 inter-married respondents.

In 2010, we simply asked "Is this an inter-faith household?" and 17% of our respondents, or 369 respondents, said yes. Comparing the two sets of findings, therefore, we see:

	<u>Relevant Sample Size</u>	<u>Intermarried / Interfaith HH</u>
2000	480 of 708	30%  144 respondents
2010	2,226 of 2,234	17%  369 respondents  

- To reiterate this bottom-line finding, because of its importance to understanding the context of this study:

In 2010, we have not turned our backs on the unaffiliated, and have in fact included them in far larger numbers than they were included in 2000 via RDD and DJN telephone-based approach. It's just that alongside these non-affiliated respondents are a robust cohort of those more affiliated Jews who in the past would never have had the chance to be "counted in", and this time around, via 2010's more inclusionary online methodology, were provided with that opportunity.

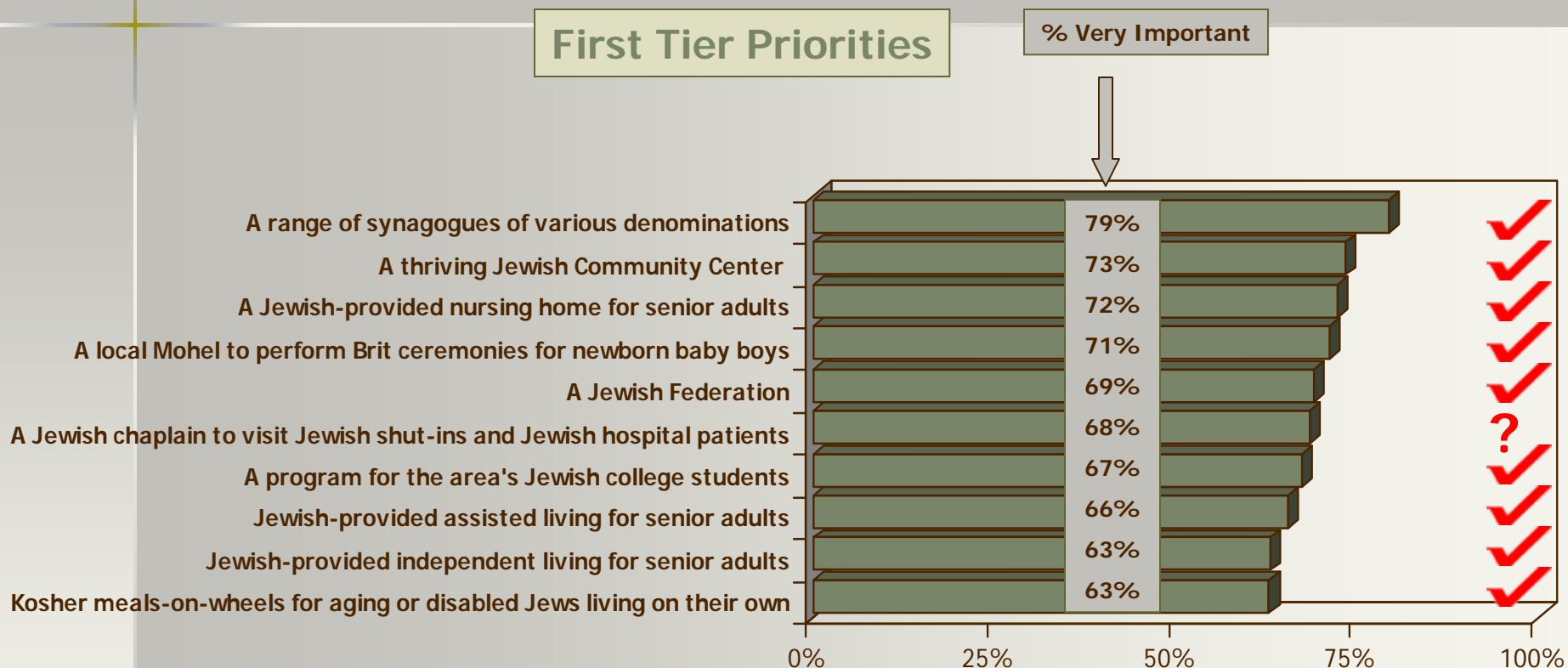
Our Collective Priorities:

What we think matters most in terms of a thriving Jewish community

As just one example of **the value of this survey as an attitudinal barometer of our community's collective perspectives – i.e. what we want, need, and value** – here we see a ranked hierarchy of most-to-least important elements of a thriving Jewish community – with a check mark next to each of the things that we do still have in Rochester today.

A HIERARCHY OF OUR COLLECTIVE VALUES

Q104) From your perspective, how important are each of the following as critical cornerstones of a thriving Jewish community?



[N = 2,234]

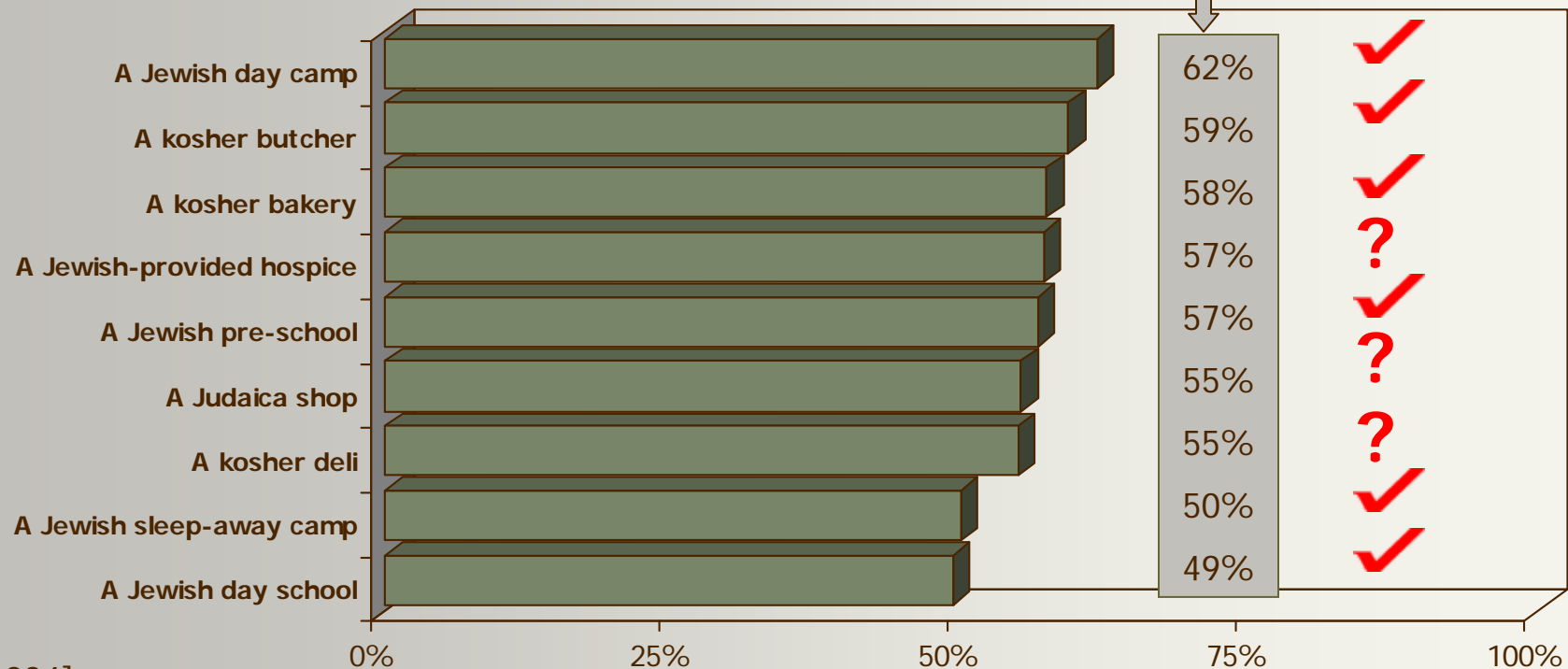
✓ = what we have today ? = what we questionably have today X = what we no longer have today

A HIERARCHY OF OUR COLLECTIVE VALUES

Q104) From your perspective, how important are each of the following as critical cornerstones of a thriving Jewish community?

Second Tier Priorities

% Very Important



[N = 2,234]

✓ = what we have today ? = what we questionably have today X = what we no longer have today

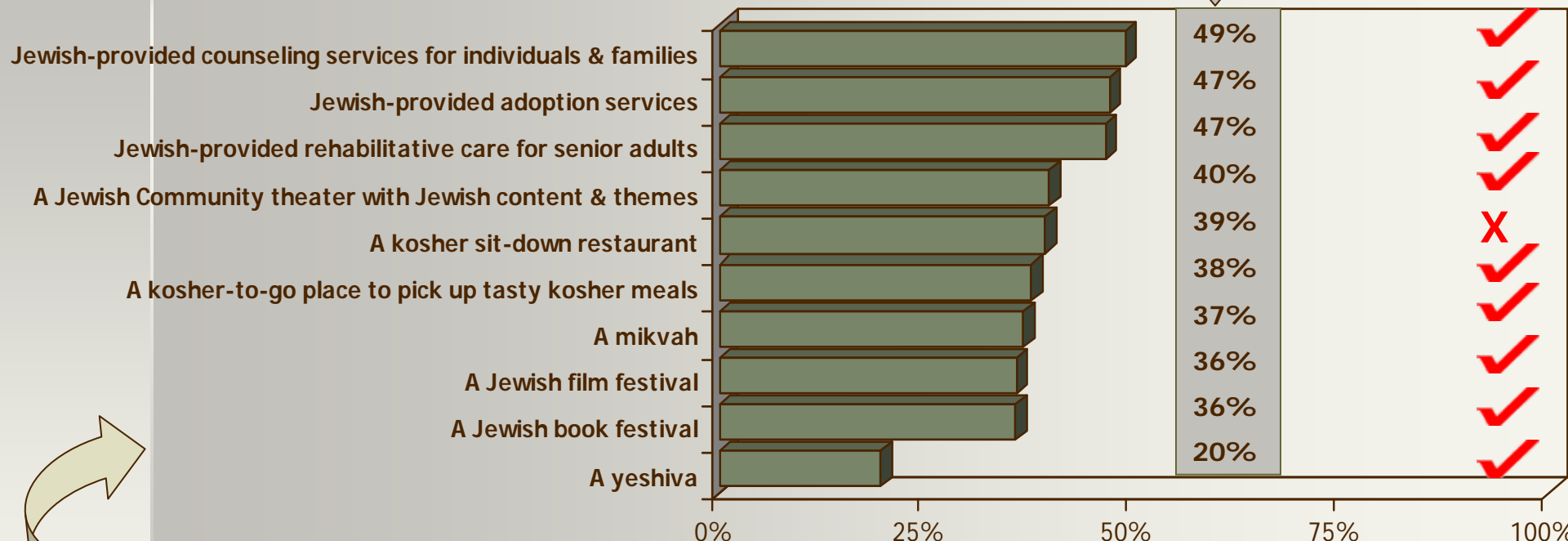
A HIERARCHY OF OUR COLLECTIVE VALUES

Q104) From your perspective, how important are each of the following as critical cornerstones of a thriving Jewish community?

[N = 2,234]

Third Tier Priorities

% Very Important

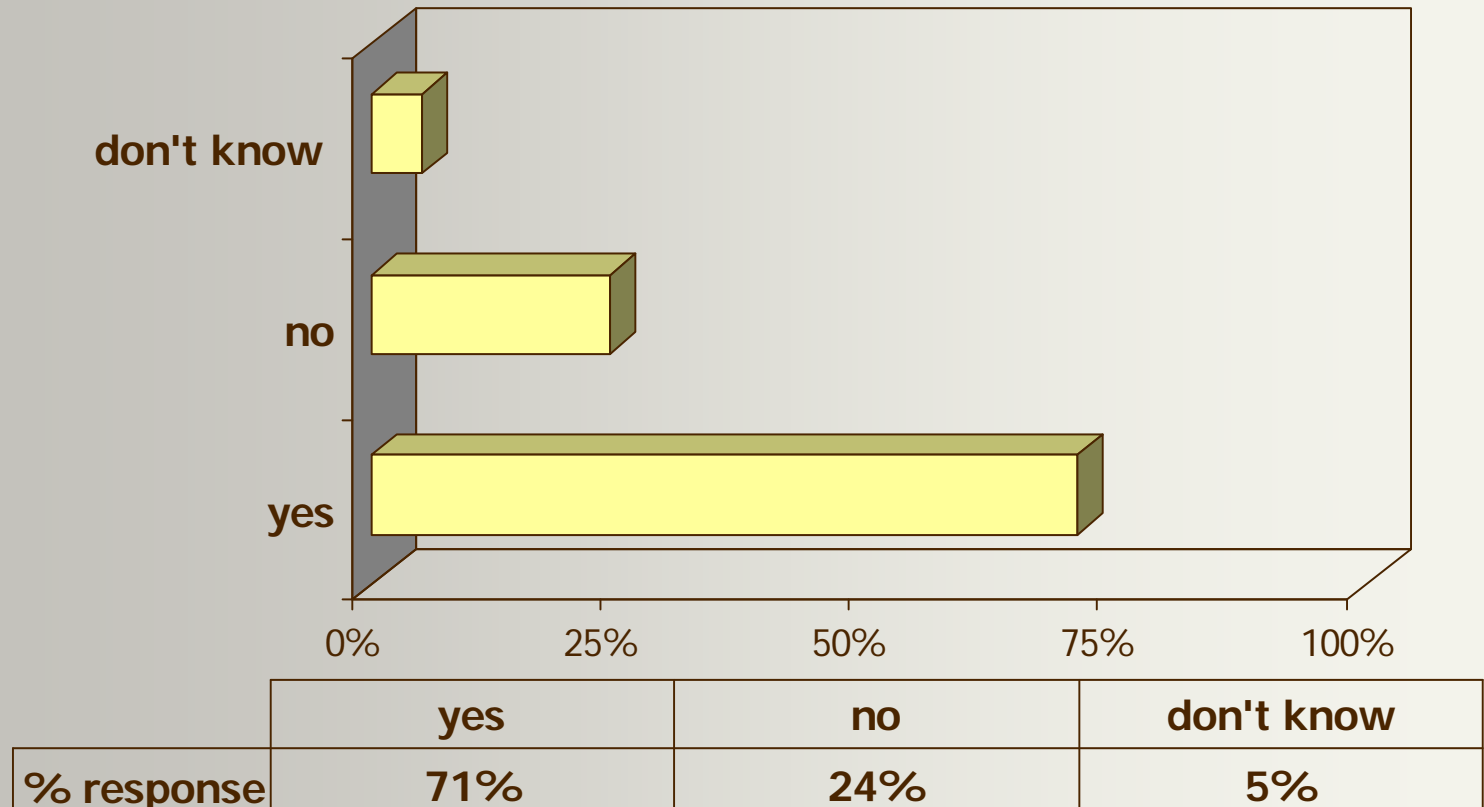


Note that even these lowest third-tier priorities may be highly important to fewer respondents, but to those respondents they may be extremely and critically vital. Even these lowest-ranked components should, therefore, not be trivialized nor downplayed in terms of community value.

✓ = what we have today ? = what we questionably have today X = what we no longer have today

Jewish Community Philanthropy Profile

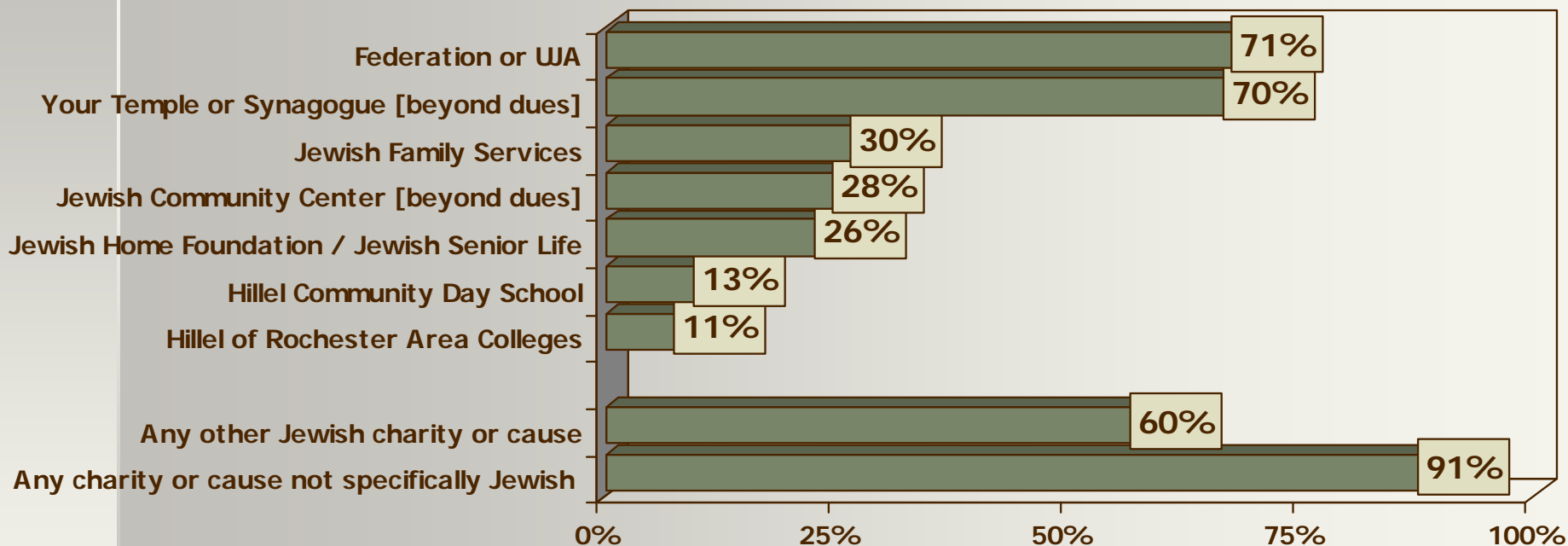
Q128a) Within the past year, did your household make a contribution to the Jewish Community Federation of Greater Rochester or the UJA Campaign?



[Est. N= 71% of 9,740 Jewish households, or 6,915 gifts. The actual number of gifts in 2009 was 3,210, or just under half that number. Our survey respondents, in other words, were just over twice as apt to donate to Federation as their non-responding counterparts – which seems directionally logical and reasonable. It would have been far more surprising, in other words, to find that this was not the case.]

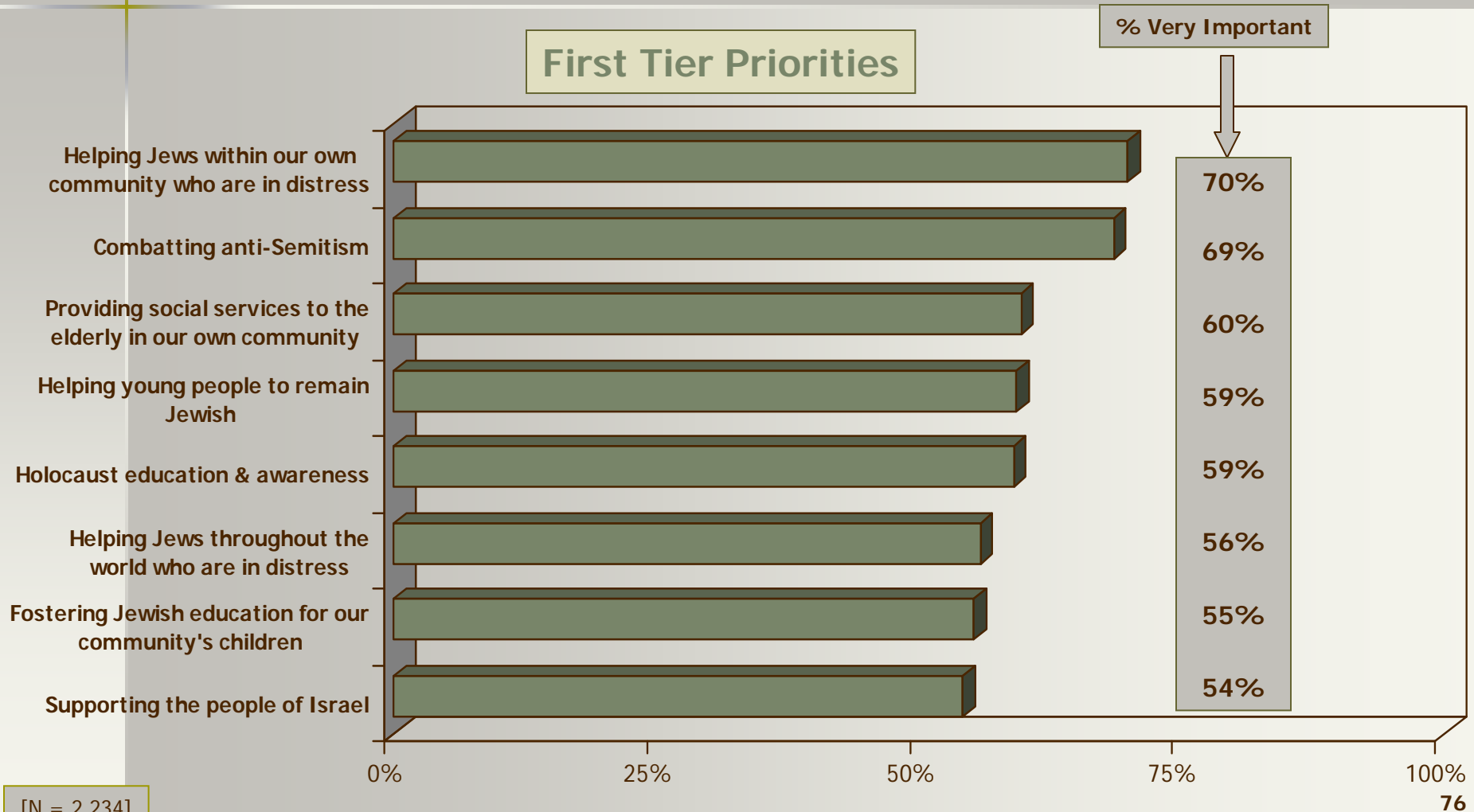
Q129) Within the past year, did your household make a charitable contribution directly to any of the following?

Hierarchy of charitable support in descending order:



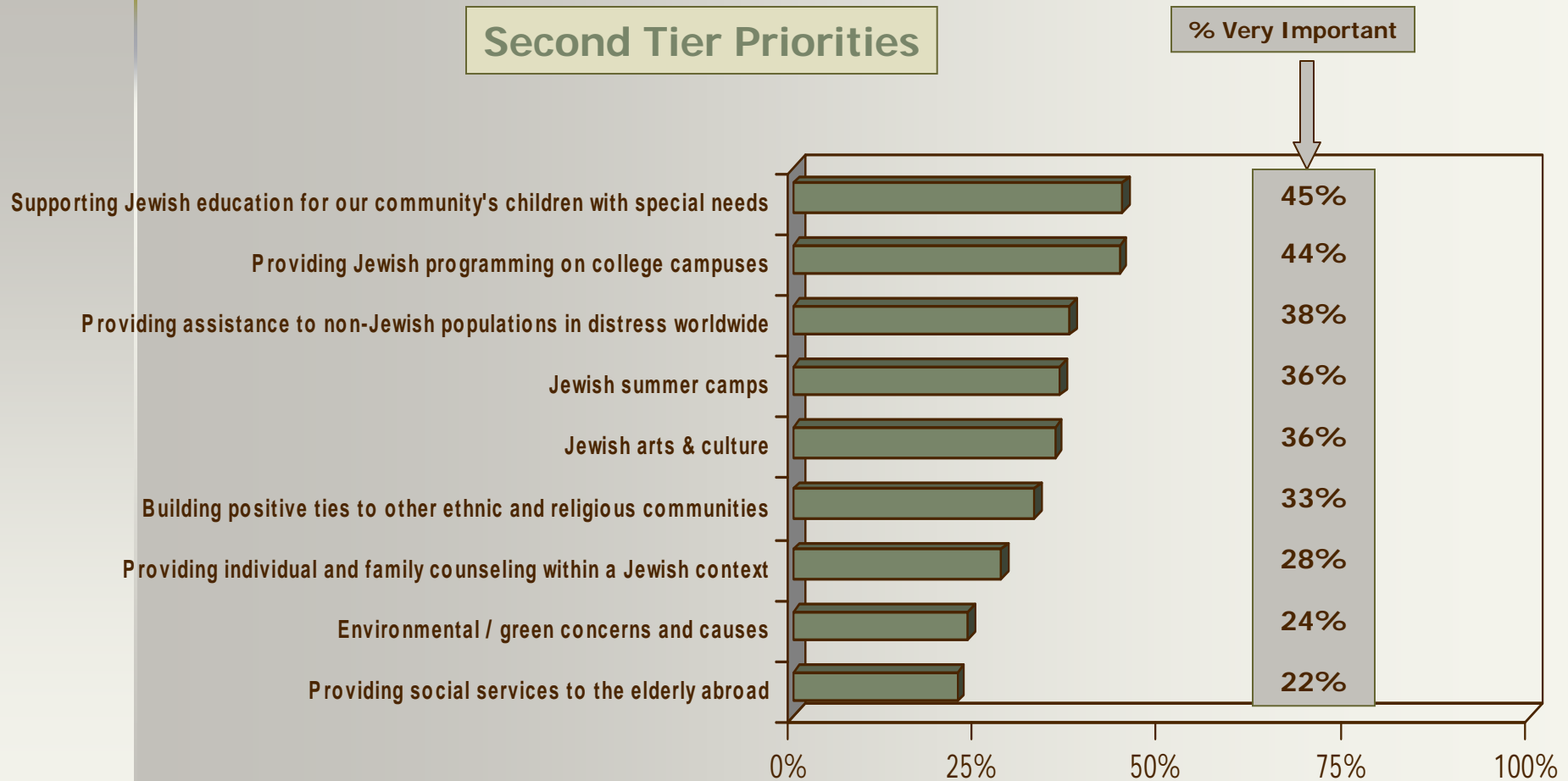
A HIERARCHY OF OUR PHILANTHROPIC VALUES – PART 1

Q132) Each of us finds different things to be meaningful and motivating in our charitable giving. When deciding what Jewish causes to support charitably, how important do you consider each of the following?



A HIERARCHY OF OUR PHILANTHROPIC VALUES – PART 2

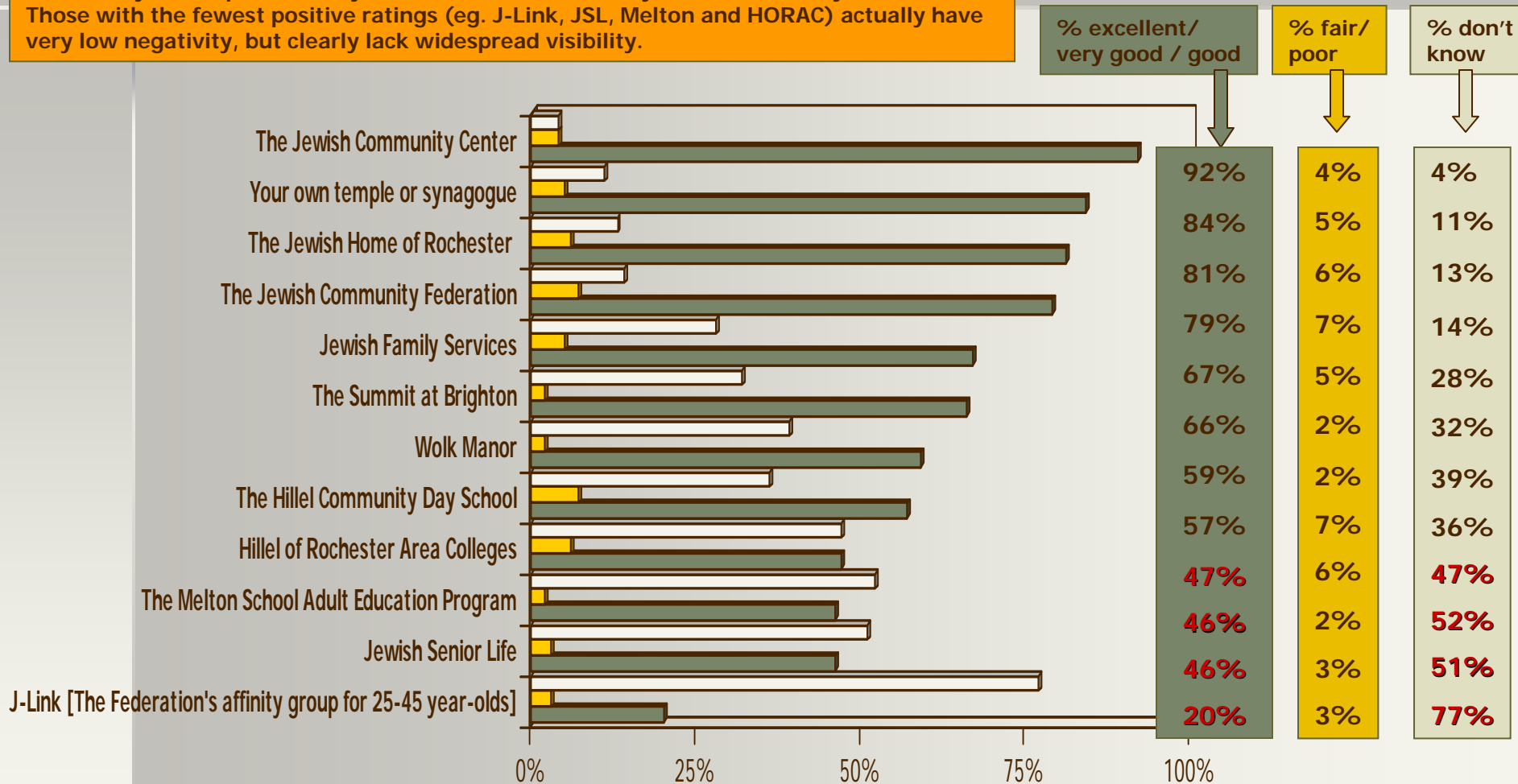
Q132) Each of us finds different things to be meaningful and motivating in our charitable giving. When deciding what Jewish causes to support charitably, how important do you consider each of the following?



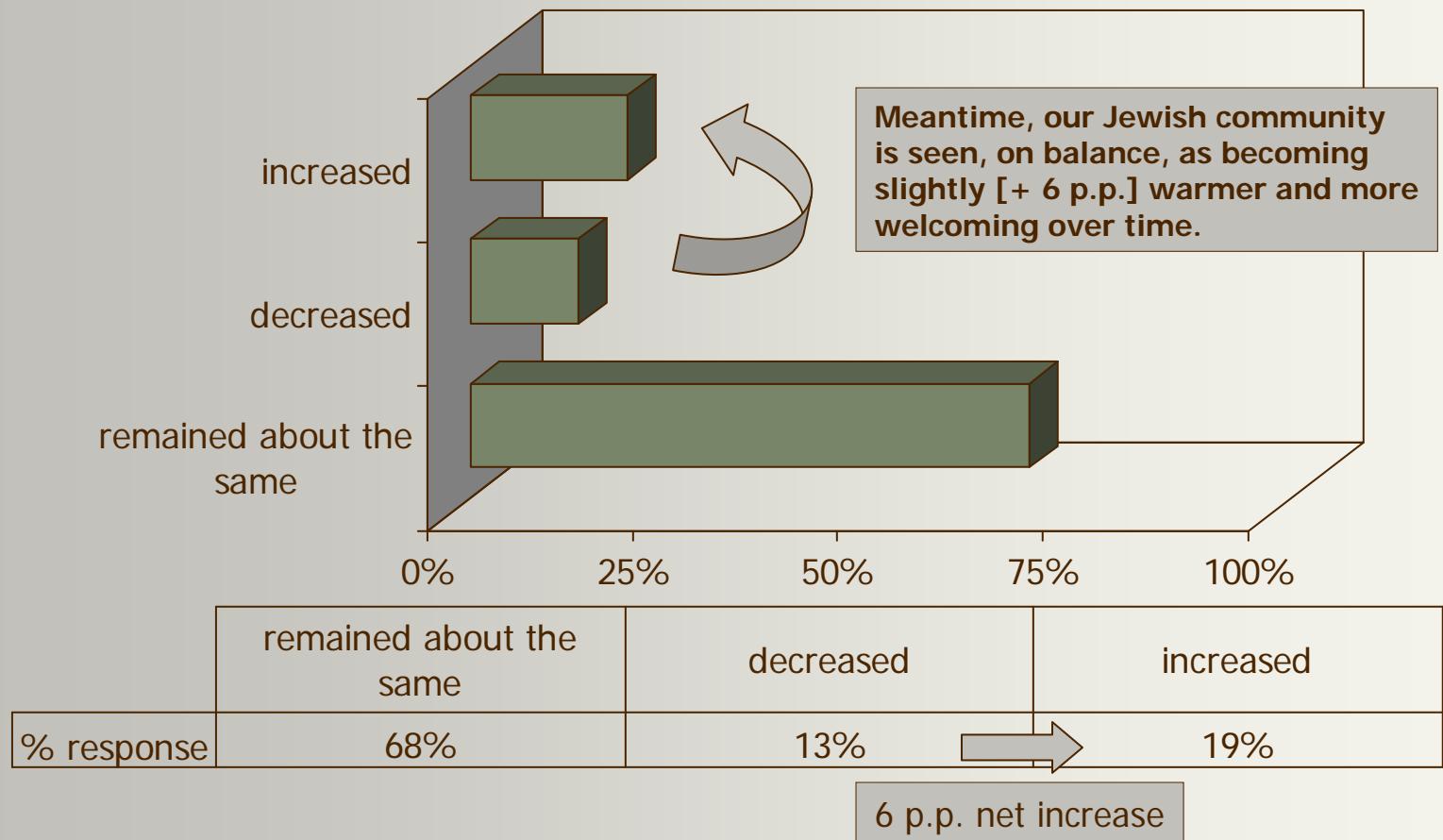
Perception of Federation and Beneficiary Agencies

Q127) Based on whatever you have personally experienced, or whatever you may have heard from others, what is your overall impression of the quality of each of these Jewish agencies, organizations and activities?

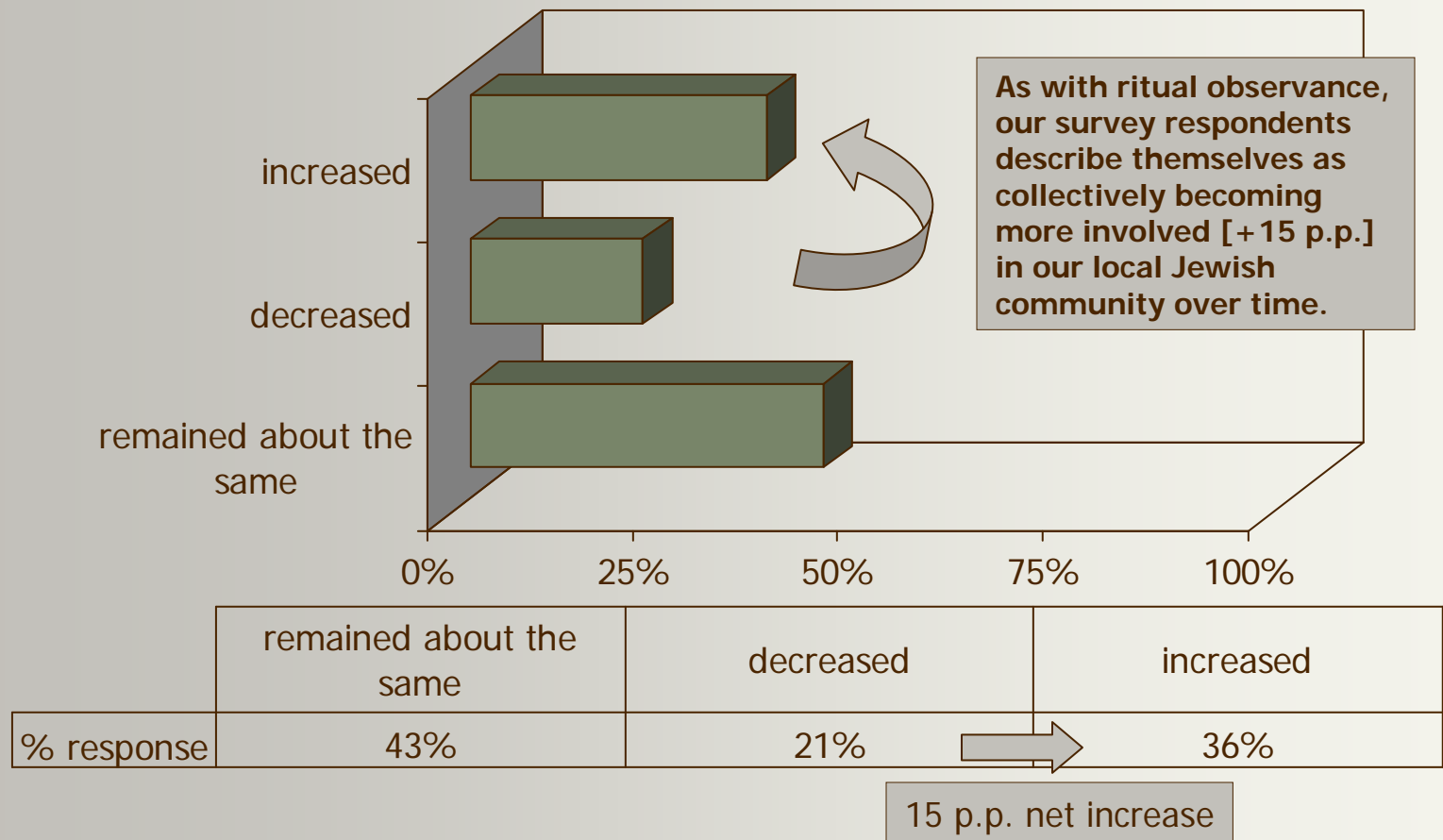
Observation: None of these entities have any significant set of detractors – but some are collectively better perceived by virtue of the fact that they are more broadly known. Those with the fewest positive ratings (eg. J-Link, JSL, Melton and HORAC) actually have very low negativity, but clearly lack widespread visibility.



Q93b) Over time, have you found that the warmth and welcoming nature of the Rochester area's Jewish community has increased, decreased, or remained about the same?

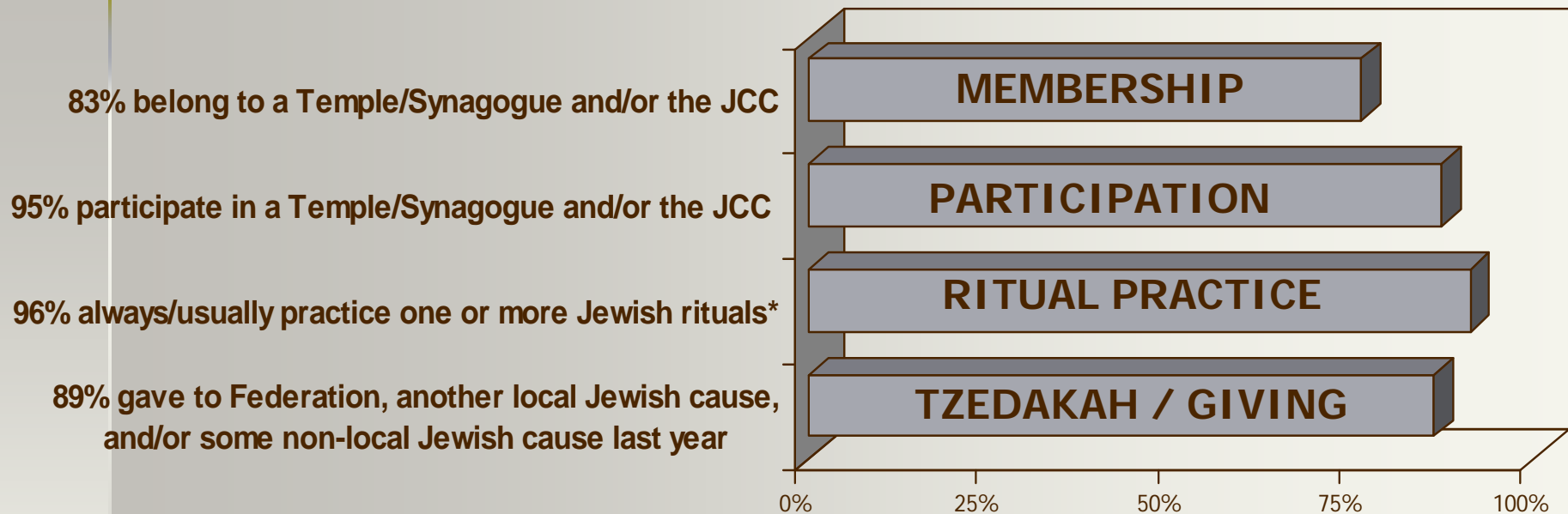


Q93c) Over time, has your involvement with the Rochester area's Jewish community increased, decreased, or remained about the same?



Reiterated Summary Slide:

A PROFILE OF OUR JEWISH COMMUNITY IN TERMS OF MEMBERSHIP, PARTICIPATION, PRACTICE & TZEDAKAH



Taken together, the sum total of membership, participation, practice, and tzedakah included 94% of our 2000 participants, and now includes 99% of our 2010 participants. We were – and we remain – a Jewishly involved community, where the vast majority of Jewish households “do something Jewish” during the course of the year.

Concluding Summary

- This set of key slides represents a sampling of some of the critical insights we now have into our Jewish Community today.
- We've seen current estimates in terms of how many of us there are, and where we live today.
- We've learned about ourselves demographically in terms of age, marital status, education, employment, home ownership, home value, income, etc.
- We've seen ourselves religiously in terms of our collective denominational profile, synagogue membership, and ritual observance.
- We've learned that we're a remarkably stable community, and an aging community -- but still a highly vibrant one. In fact, of 29 cornerstones of a thriving Jewish community, we see that we still have today nearly all of the cornerstones we collectively value most.
- And as the prior slide shows, we have found that the vast majority of us – 99% -- do at least something Jewish over the course of the year; and if we do anything Jewish there is always the potential for doing something more in the years ahead. And this, too, offers a very optimistic bottom line in terms of our Jewish community's future.
- Finally, this is just the tip of the iceberg. The rest of the story will be told in the months to come via a series of presentations and reports, each of which will focus on another chapter of **"Count Me In – A Portrait of the Rochester Jewish Community today"**.

Still to Come:

The Rest of the Count Me In Story

- **Where Do We Come From, and Where are We Going?**
- **Who Are We Jewishly?**
- **Jewish Education Profile**
- **Our Children & Teens**
- **How We View Our Jewish Community**
- **Who Are We Philanthropically?**
- **Focus on Interfaith Households**
- **Focus on those with Disabilities within our Jewish Community**
- **Focus on GLBT Households**
- **Focus on our Local Jewish College Students**
- **Aging in Rochester: Perspectives & Priorities for Today & Tomorrow**
- **The Services We Need Today – and Envision Needing in the Future**

Each of the above will comprise another chapter in our story, and a resource for the ongoing use of those who will be planning for our Jewish community's future in the years ahead. These specifically focused presentations will be posted to the Federation's website in the coming 6-8 weeks, and will remain there for long-term community access.

We asked.
You answered.
We learned.

Thank you, one & all, for saying *"Count Me In."*