

# Demographic & Opportunity Study

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April 2011



## Objectives

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- To prepare for future opportunities and challenges of the local Jewish community, the Jewish Federation of Greater Portland conducted research designed to:
  - Estimate the current size of Portland's Jewish community.
  - Identify areas of unmet needs (services, programming, etc.).
  - Explore current perceptions of local Jewish organizations.
  - Determine best ways to reach unengaged population.

### Determining the size of the community

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- A two phase process for sizing was conducted by Yacoubian Research in Fall 2008:
  - Phase I: 1,800 screening interviews to identify Jewish households completed through random digit dial (RDD)\*.
  - Phase II: 2,513 screening interviews using stratified RDD (RDD calls within census tracts and zip codes where at least one known Jewish household was located).
- The 4,313 screening interviews identified 46 Jewish households. This process determined the number of Jewish households and population in the region.

\*Randomly generated phone numbers for census tracts and zip codes in Clackamas, Multnomah, and Washington counties in Oregon and Clark County in Washington included cell phone numbers.

### Determining the size of the community—Who was counted?

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- **Jewish Persons**
  - Jewish people who self-identify as Jewish (religiously, ethnically, or culturally)
- **Jewish Households**
  - Households that include at least one Jewish person
- **Persons in Jewish Households**
  - Children and adults in above categories, plus non-Jews living in Jewish households (where one adult is Jewish)

## Jewish Population Estimates

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- Jewish Persons: 47,500
- Jewish Households: 27,700
- Persons in Jewish Households: 60,000

## Identifying opportunities to increase involvement

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- In Spring 2009, Yacoubian Research conducted a total of 904 interviews with Jewish households.
- The 200+ question survey was structured to allow all questions to be voluntary.
- 100 interviews are excluded from this presentation because one or more questions used to segment\* the sample were not answered.
- Sample source for the 804 surveys in this analysis:
  - 31 (4%) from Phase 1 And Phase 2 random digit dialing (RDD).
  - 773 (96%) from Phase 3 dialing from community mailing lists.\*\*

\* See slide 10 for description of segments.

\*\*11,000 unique households compiled from 16 Portland area Jewish agencies, organizations and congregations lists.

### Identifying opportunities to increase involvement

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- All population studies require some weighting to reflect a more accurate measure of the population.
- Since community mailing lists reflect, in large part, those with some involvement in the community, the raw results of the survey over-represent involved audiences.
- However, given the small size of the RDD sample, it was impossible to effectively replicate the known data.
  - Multiple weighting schemes were applied to the data by county, synagogue membership, survey mode, level of involvement and a combination of the above.
  - None of the weighting schemes were able to accurately approximate known “hard” data statistics (synagogue membership, MJCC membership, number of Jewish day school students, etc.).

### Identifying differences by level of involvement

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- While this dataset cannot be used to report findings as a representation of the entire community, measures were taken to segment the dataset and identify possible issues of interest and importance among key segments.
- Given there were only 11,000 Jewish households identified on community lists compared to the 27,700 estimated, there is a clear need to better understand those with no communal involvement.
- To that end, four questions were used to create an involvement index:
  - How involved are you in Jewish social, cultural, religious, athletic or artistic organizations or activities in the Greater Portland Area?
  - Are you, or anyone in your household, now a member of the Mittleman Jewish Community Center?
  - Are you, or is anyone in your household, now a member of a congregation?
  - Do you plan to participate in the Federation's next annual campaign?

### Segment Definitions

	High Involvement	Moderate Involvement	Low level of Involvement*
Very/somewhat involved in Jewish organizations and activities			
Member of a congregation	292	379	134
MJCC member	Answered positively to 3 or more	Answered positively to 1 or 2	No positive answer to any
Definitely/probably will participate in Federation's next campaign			

\*Respondents in this segment are classified as having “low levels of involvement” and not as “uninvolved” because the segment includes people who indicate involvement in the Jewish community is “not too important” as well as “unimportant” and people who “probably won’t” or “definitely won’t” participate in Federation’s next campaign. Members of this segment may have other communal involvements.

## Segment Definitions

	High Involvement	Moderate Involvement	Low Level of Involvement
Very/somewhat involved in Jewish organizations and activities	99%	59%	0
Member of a congregation	96%	66%	0
MJCC member	34%	7%	0
Definitely/probably will participate in Federation's next campaign	92%	29%	0

### Caveats

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- The questions in this survey were voluntary, so there are instances where respondents skipped specific questions leading to “missing data”.
- The tables and graphs in this presentation are based on those responding and bases may fluctuate from question to question.
- In many instances, mean ratings are reported (instead of top box percentage ratings) due to the high number of “Don’t Know” responses. Mean computations exclude “Don’t Know” responses and thus are based only on those who provided a valid rating.

## Demographic and Opportunity Study

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### **Demography**

Jewish Identity and Engagement

Jewish Education

Community Perceptions

Social Services

Volunteerism and Philanthropy

Household size for highly and moderately involved Jews is in line with the state average of 2.49\*, while households with low levels of involvement are significantly smaller in size and Jewish representation.

	High Involvement	Moderate Involvement	Low level of Involvement
People per household	2.5	2.5	2.0
Jewish people per household	<b>2.4</b>	2.1	1.5
Percent of household who are Jewish	96%	84%	75%

When a result for one segment is significantly higher than another segment, that result is *italicized*, when significantly higher than both other segments, appear in ***bold and italics***.

Non-practicing Jews represent a small percentage of survey respondents.

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- People who report themselves as non-practicing Jews (born and/or raised Jewish) represent:
  - 9% of the low involvement segment
  - 3% of the moderate involvement segment
  - 1% of the high involvement segment
- 15% of Jews with low levels of involvement have at least one member of their household who was born Jewish, but no longer consider themselves Jewish (significantly more than those with moderate involvement at 9% and high involvement at 3%).
- Current religious practices for non-practicing Jews range from Christianity to Buddhism to no religion.

Households with low levels of involvement are significantly less likely to include children age 18 or under. Low involvement households with children are also less likely to be raising their children Jewish.

	High Involvement	Moderate Involvement	Low Involvement
None	66%	70%	<b>85%</b>
One to Two	30%	26%	13%
Three or more	3%	4%	2%
Average # of children (All households)	.6	.6	.3
Average # of children (Households with children)	1.7	1.9	1.9
Percent raising children Jewish (Households with children)	<b>100%</b>	88%	70%

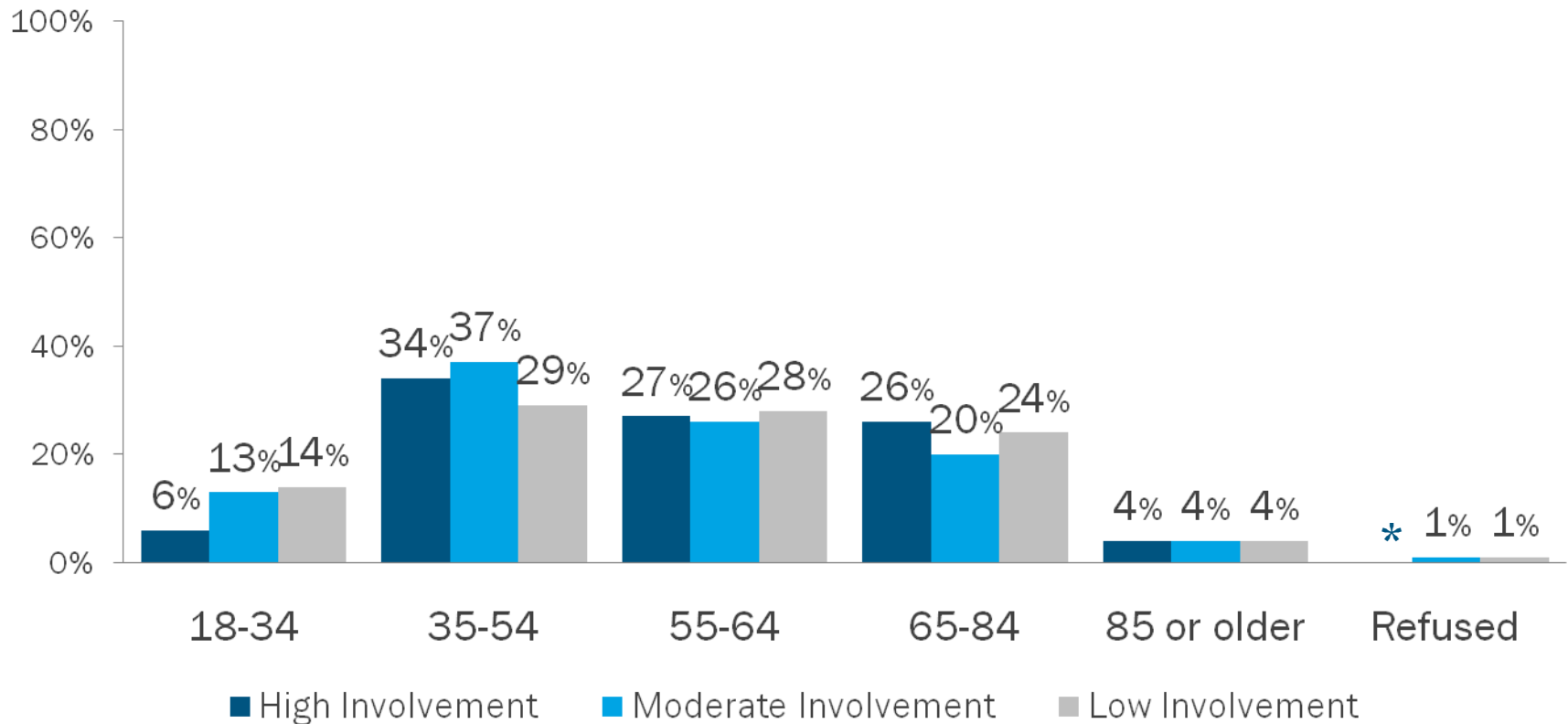
## General Demographic Differences by Segment

Jews with low levels of involvement have lived in the Portland metropolitan area for a shorter period of time, are significantly less likely to be married, and are less likely to own their home.

	High Involvement	Moderate Involvement	Low Involvement
Length of residence:			
Less than 5 years	11%	14%	23%
Median years*	24.8	18.8	17.5
Median age	58.4	55.1	57.2
College graduate +	91%	80%	79%
Employed/Retired	55% / 34%	55% / 26%	52% / 26%
Married	76%	61%	49%
Median income	\$111.0 k	\$75.8 k	\$71.1 k
Own home	89%	82%	72%

\*Median is based on those who gave a numeric response, vendor included an option of “all my life” which was selected by a small portion of respondents.

Approximately a third of all respondents in this survey are age 65 or older. Latest census estimates that 13.3% of Oregon's population is age 65 or older.



\* Less than 0

Across segments, over half live in Multnomah County. Three times as many moderately involved Jews live in Clark County than other segments.

	High Involvement	Moderate Involvement	Low Involvement
Multnomah	57%	51%	54%
Washington	29	25	20
Clackamas	7	10	13
Clark	4	12	4
Unknown/Other	3	3	8

Majority of highly involved Jews live in close proximity to Jewish community organizations, while this is not the case for those with low levels of involvement.

	High Involvement	Moderate Involvement	Low Involvement
SW Portland	50%	30%	20%
NW Portland	10%	10%	3%
Tigard/Tualatin area	9%	6%	8%
Beaverton	7%	7%	11%
SE Portland	7%	15%	23%
Lake Oswego/West Linn	6%	7%	9%
N/NE Portland	6%	9%	14%
SW Washington	4%	11%	4%
Forest Grove/Hillsboro	0%	2%	2%
Milwaukie/Oregon City	0%	1%	4%
East Multnomah and Clackamas County	0%	2%	2%

\*Excludes 5 respondents who live outside of survey area and 28 respondents who did not supply zip codes.

## Demographic and Opportunity Study

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Demography

**Jewish Identity and Engagement**

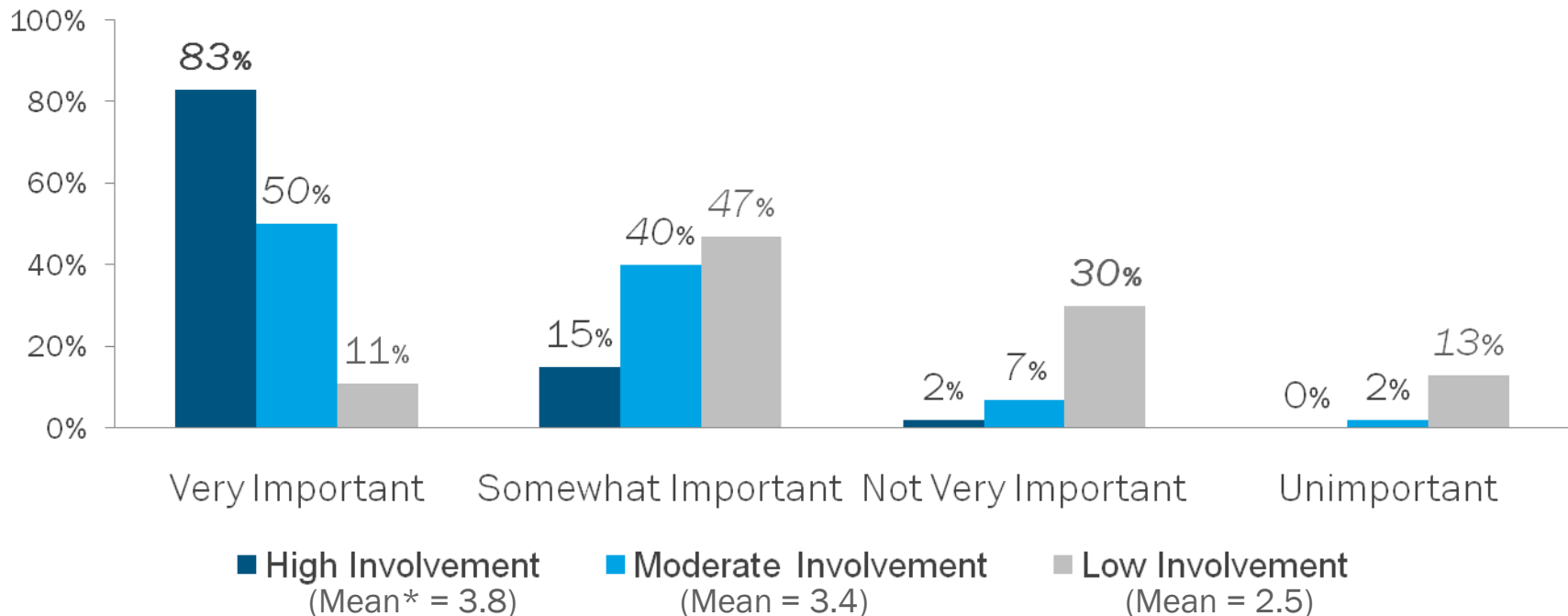
Jewish Education

Community Perceptions

Social Services

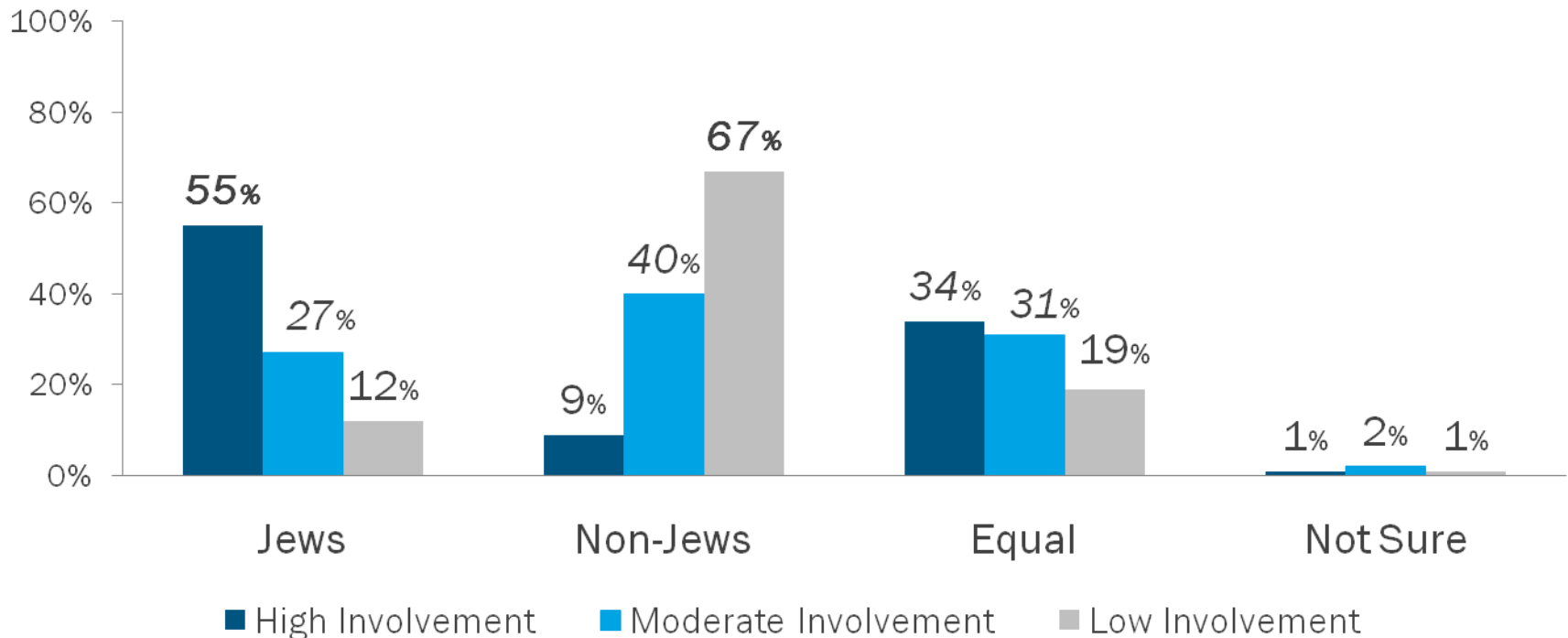
Volunteerism and Philanthropy

Not surprisingly, the vast majority of highly involved Jews indicate it's very important to be involved in the Jewish community, while more than four in ten of those with low levels of involvement state that it is not important.

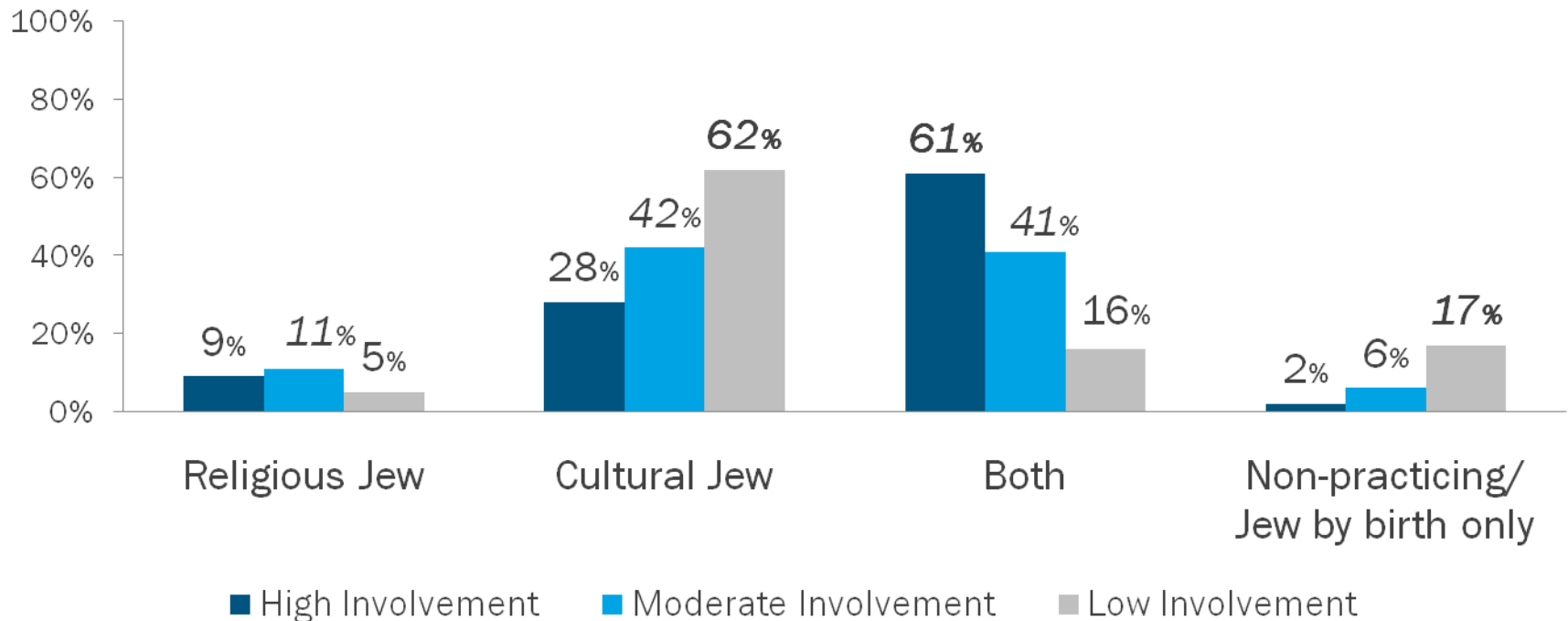


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- Among Jews with both moderate and low levels of involvement, the primary reasons given for not being more involved in the community include:
    - Lack of interest (primary reason among those with low levels of involvement).
    - Too busy (primary reason among those with moderate levels of involvement).
    - Concerns regarding costs.

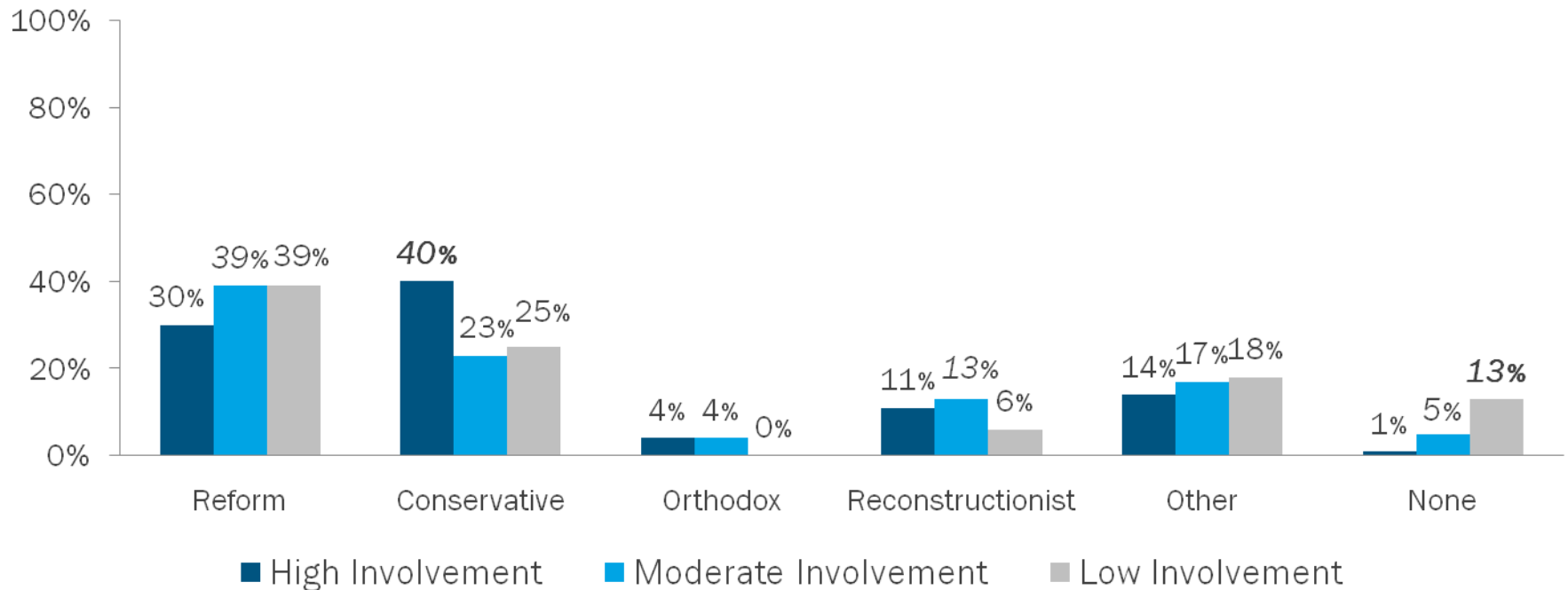
In striking contrast to highly and moderately involved Jews, two thirds of Jews with low levels of involvement report that most of their friends are non-Jews.



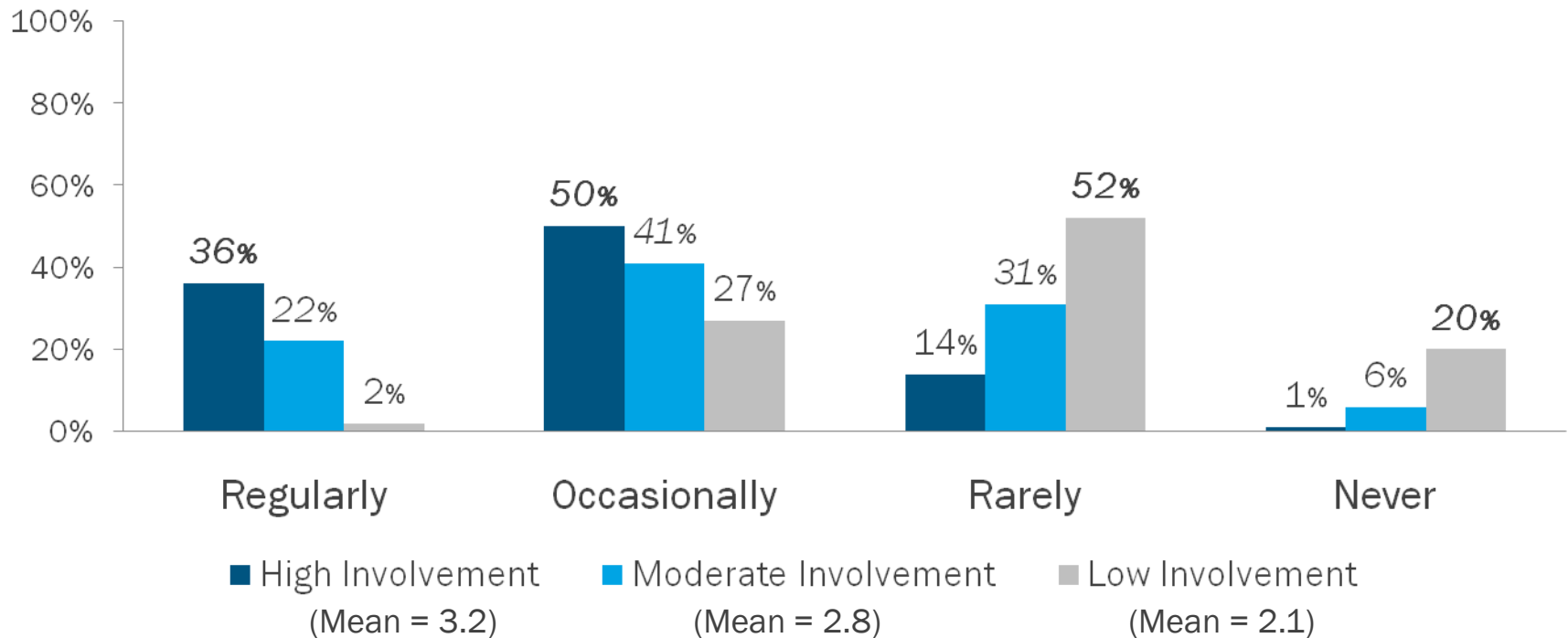
Unlike highly and moderately involved Jews, most Jews with low levels of involvement define their Jewish identity as cultural (non-religious).



Majority across all segments identify as Reform or Conservative Jews, with highly involved Jews more likely to be Conservative and Jews with moderate and low levels of involvement more likely to identify themselves as Reform.



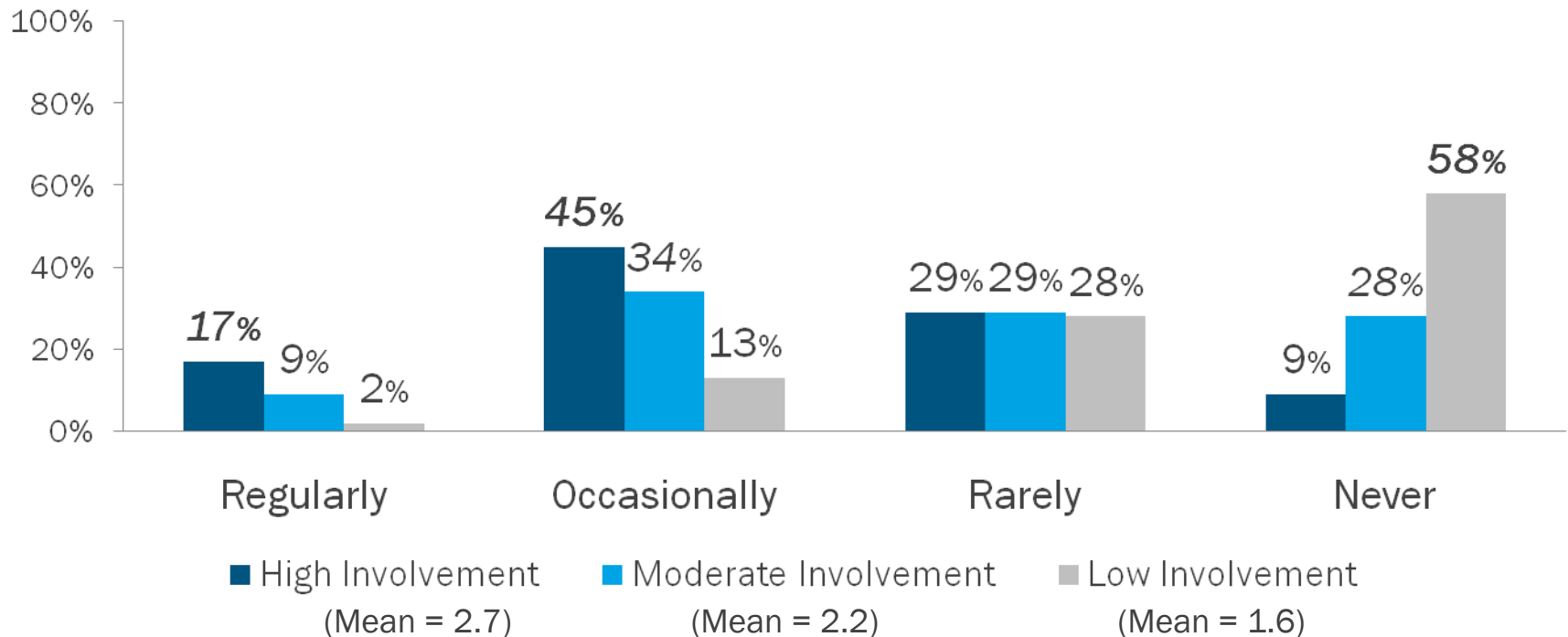
In marked contrast to highly and moderately involved Jews, almost three-quarters of Jews with low levels of involvement rarely, if ever, attend religious services.



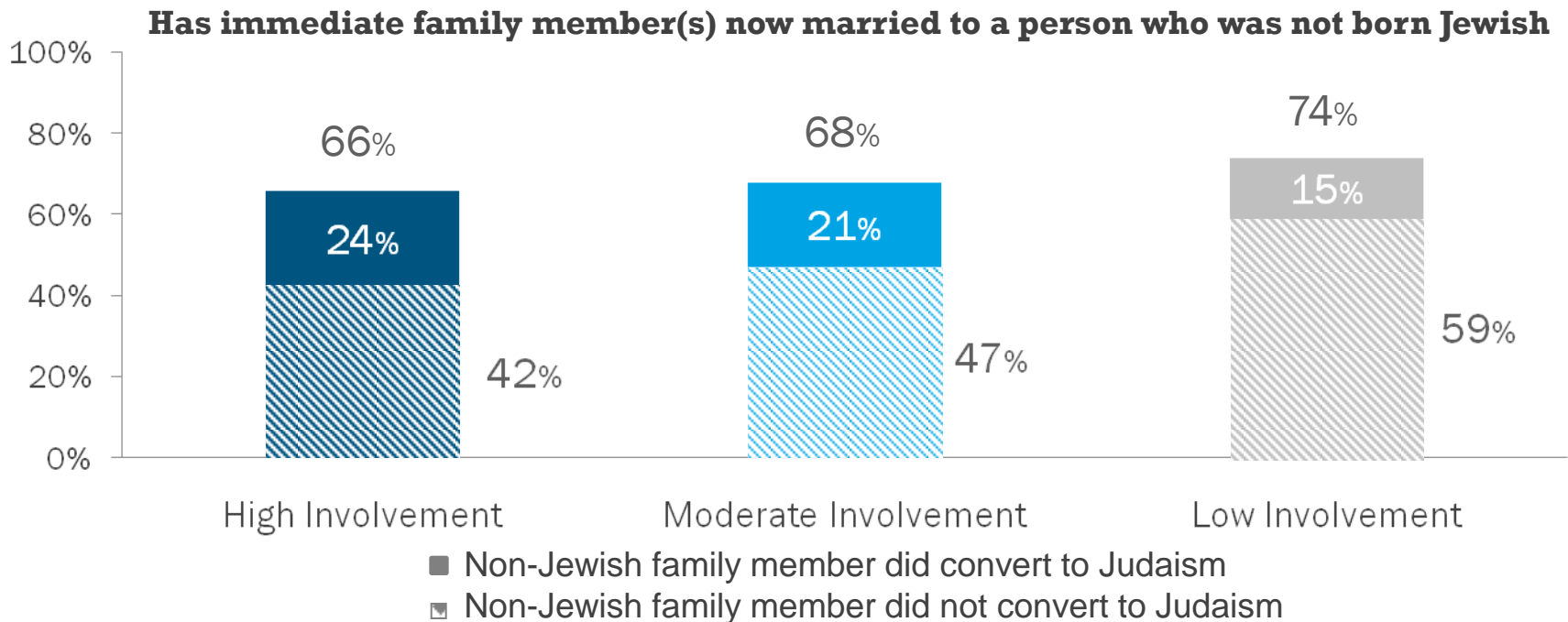
# Jewish Identity and Engagement

## Attendance to Lectures or Jewish Education Programs

58% of Jews with low levels of involvement have not attended any lectures or Jewish education programs in the past year. In contrast, nearly two-thirds of highly involved Jews have attended at least occasionally.

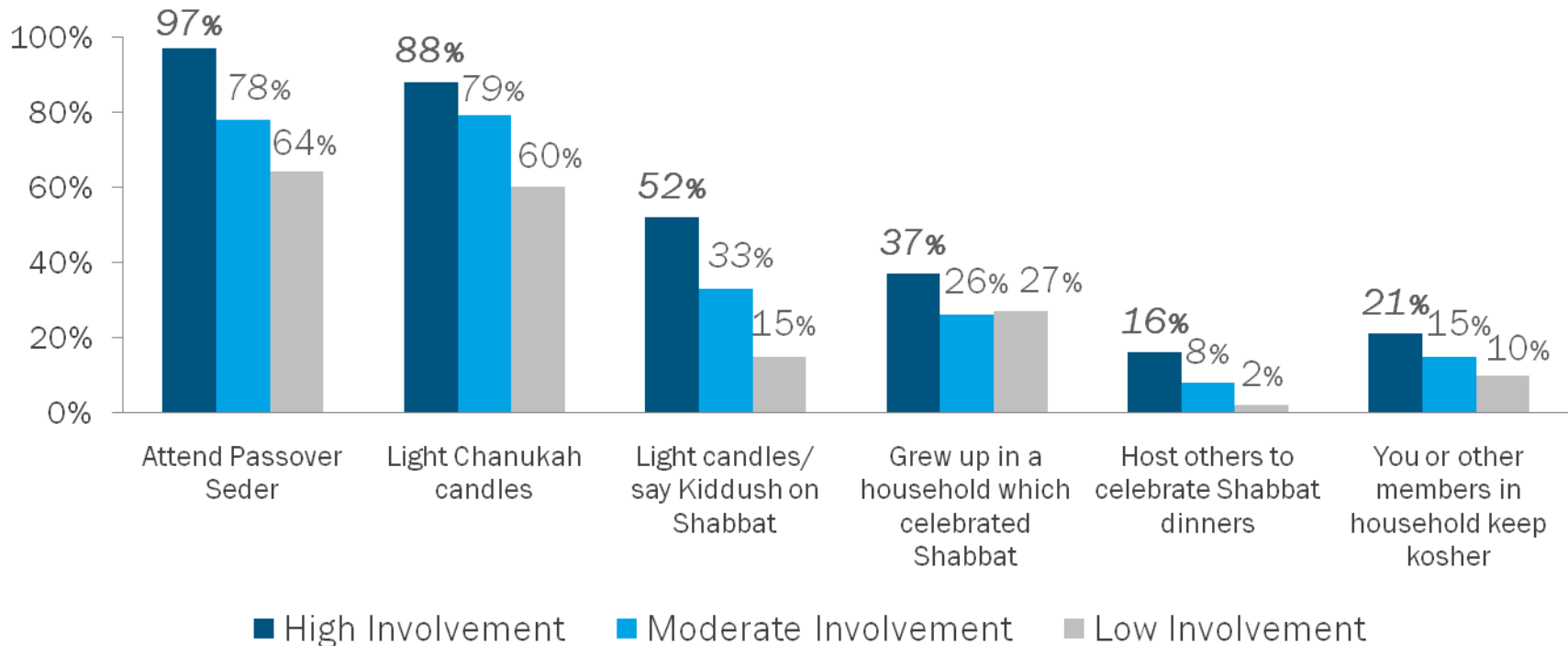


Jews with low levels of involvement are significantly less likely to report that the non-Jewish spouse (in any inter-marriages among their immediate family members) converted to Judaism.



\*Question-wording does not allow for rate of intermarriage to be calculated, as survey asked for all intermarriages within immediate family (including parents and siblings living in separate households).

Majority of all Jews attend a Passover Seder and light Chanukah candles, while lighting of Shabbat candles is more common among Jews with high and moderate levels of involvement.

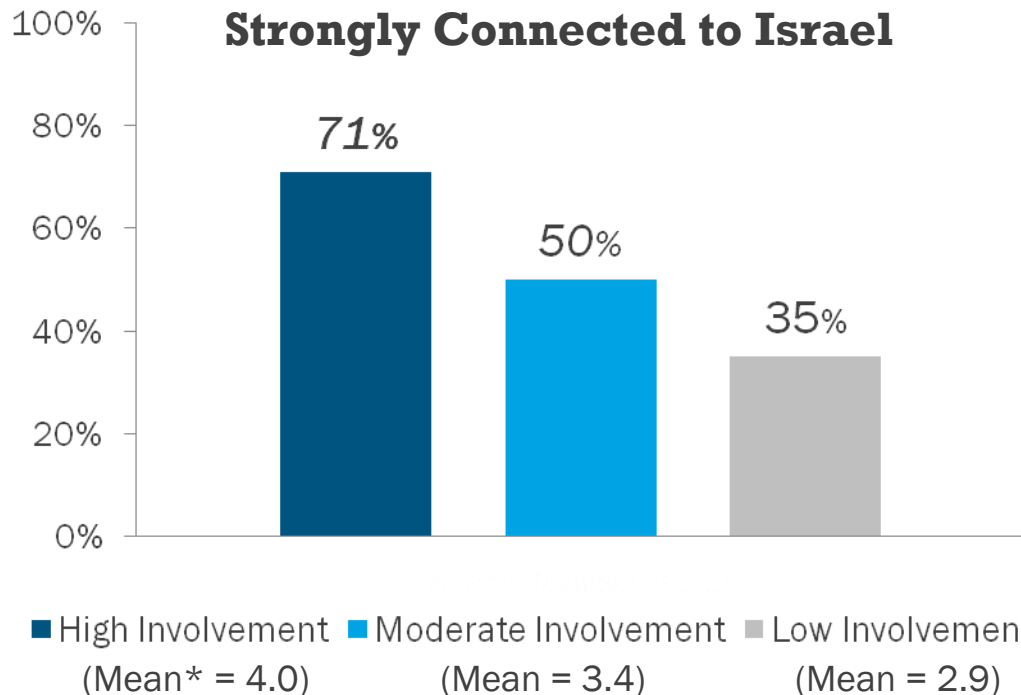


Opinion is split across Jews of all levels of involvement with regard to whether anti-Semitism is a problem in Portland.

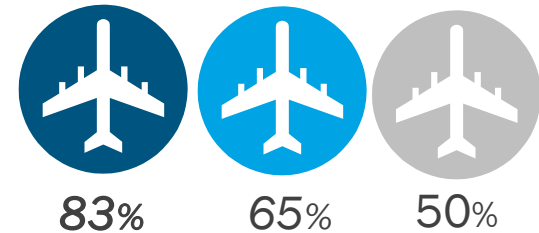
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- About two-thirds of all three segments say they have never experienced anti-Semitism in Portland.
- Those who have experienced anti-Semitism in Portland are more likely to have experienced it over two years ago (rather than recently).

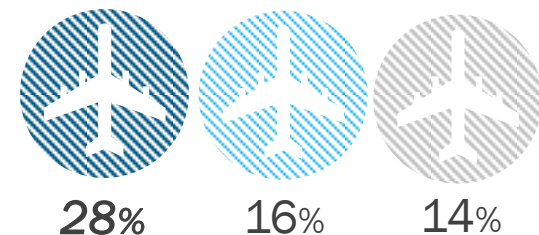
Jews with low levels of involvement are significantly less likely to feel any strong connection to Israel. They are also much less likely to report that they *or anyone in their household* have traveled to Israel or have any plans to travel to Israel.



### Have Traveled to Israel



### Plan to Travel to Israel



\* Mean ratings computed using a scale of 1 to 5 where 1="Not connected" and 5="Very strongly connected".

## Demographic and Opportunity Study

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Demography

Jewish Identity and Engagement

**Jewish Education**

Community Perceptions

Social Services

Volunteerism and Philanthropy

The majority of respondents in this sample do *not* have children living in their household. Jews with low levels of involvement are even less likely to live in households that include children.

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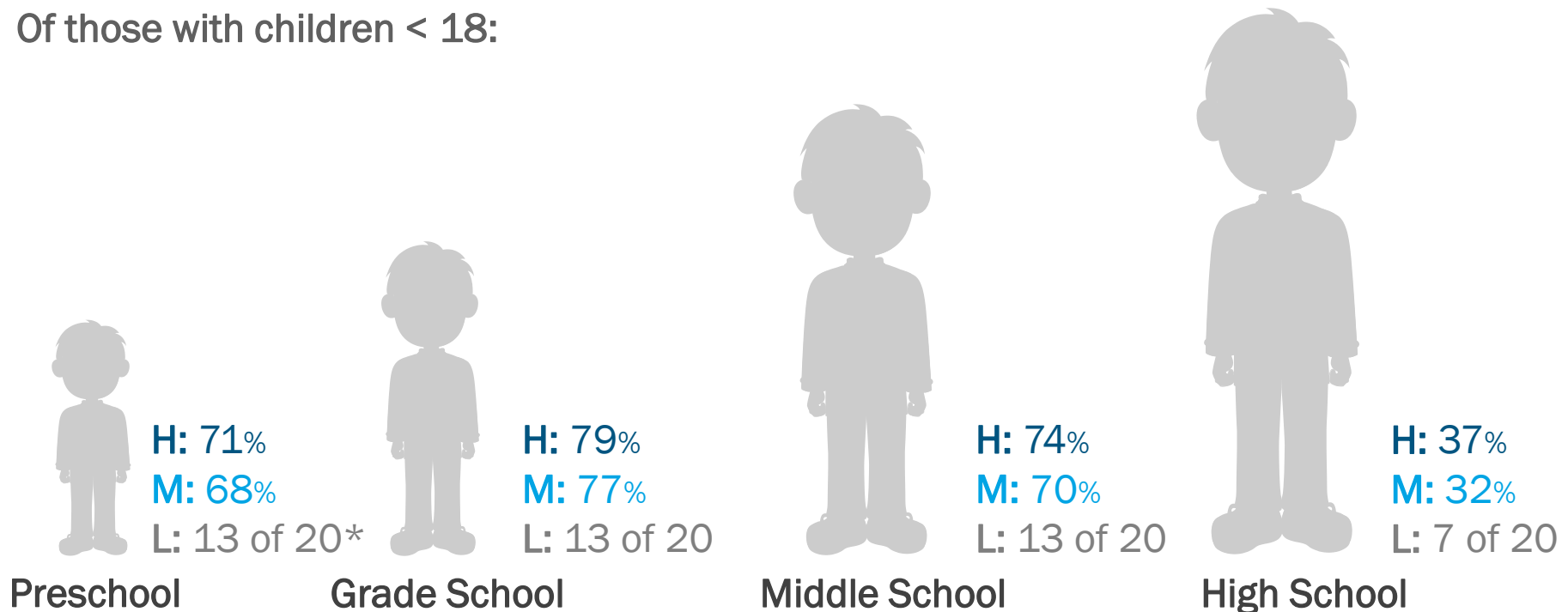
### Percentage of Households with Children < 18



Among those households with children, current education levels of children in the household do not differ significantly by segment.

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Of those with children < 18:



\* There are too few low involvement households with children to report percentages.

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- A number of questions asked for the specific schools that children in K-12 attend with the intention of understanding attendance and enrollment interest in Jewish preschools, day schools and a possible Jewish high school.
  - Due to inconsistencies in the dataset that could not be corrected, there is uncertainty with the data related to enrollment in Jewish preschools and day schools.
  - The next three slides depict the variation in participation rates for Jewish children's programming across segments.

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Of all households:



H: 10%  
M: 12%  
L: 9%

Likely to have children who need  
pre-schooling in the next 5 years\*

Of those with children < 18:



H: 57%  
M: 54%  
L: 5 of 20\*\*

Have children attending  
religious schools

\* Includes respondents who currently have children attending preschool.

\*\* There are too few low involvement households with children to report percentages.

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Of those with children < 18:



H: 47%

M: 26%

L: 0 of 20

Have children who became  
a bar/bat mitzvah\*

Of those with high school students:



H: 14%

M: 11%

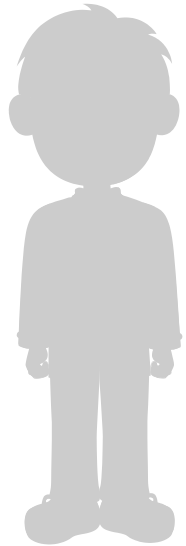
L: 0 of 20

Express interest in sending children  
to a Jewish high school\*\*

\* Only asked of respondents who *currently* have children age 18 or under.

\*\* Only asked of people who have high school students.

Of those with children < 18:



**Jewish**

**H: 74%**

**M: 66%**

**L: 13 of 20**

**Secular**

**H: 39%**

**M: 45%**

**L: 4 of 20**

Have children who attended a day camp last year

Of those with children < 18:



**H: 37%**

**M: 25%**

**L: 0 of 20**

Have children who regularly participate in youth groups

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Of all households:



Attend college

H: 15%

M: 16%

L: 9%

Of those with children who attend college:

Active in Jewish campus organization

H: 47%

M: 26%

L: Base size is too small to report

## Demographic and Opportunity Study

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Demography

Jewish Identity and Engagement

Jewish Education

**Community Perceptions**

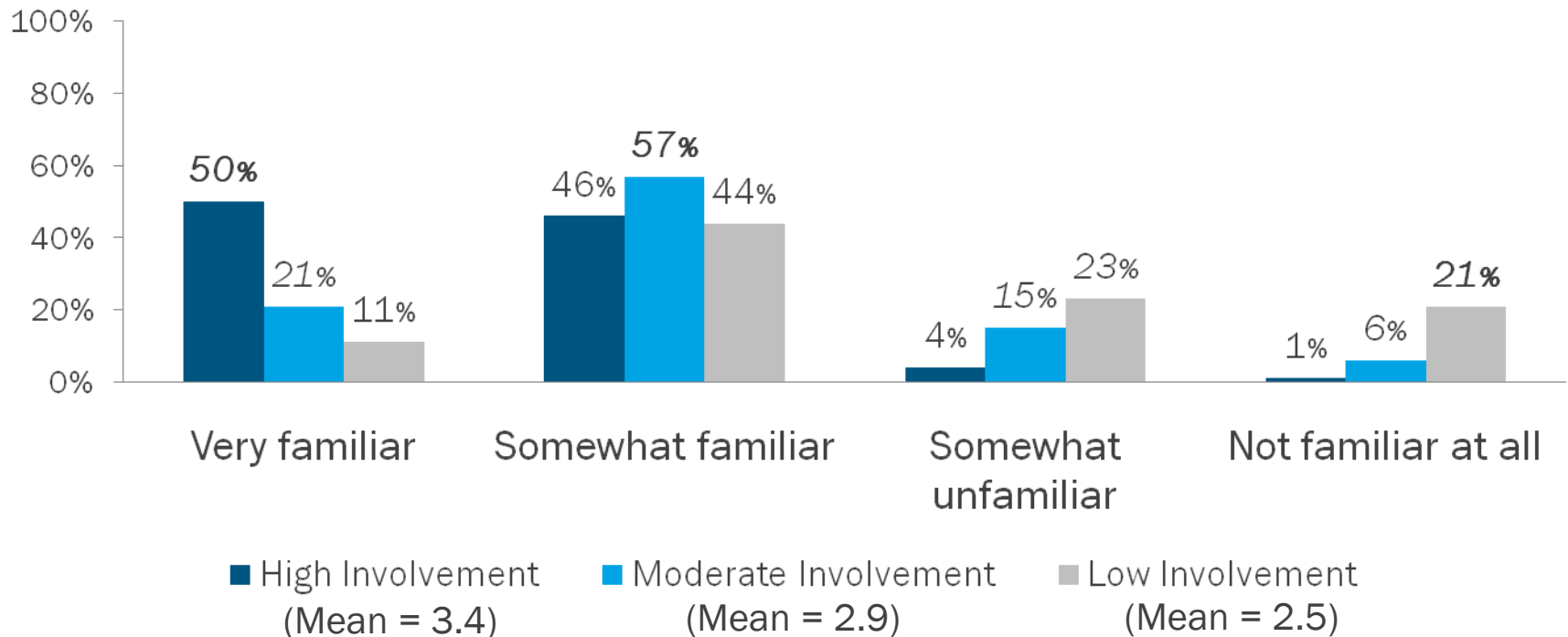
Social Services

Volunteerism and Philanthropy

Across segments, there is no consensus on the highest priority public affairs issue. However, Israel stands out among highly involved Jews as the top priority for this segment. While promotion of civil rights stands out as the top priority among those with low levels of involvement.

	High Involvement	Moderate Involvement	Low Involvement
Israel	18%	11%	11%
Promotion of civil rights and tolerance	14%	16%	21%
Fighting anti-Semitism	8%	11%	12%
Economic justice (fighting poverty)	5%	10%	8%
Protection of the environment	2%	2%	5%
Church and state (1 <sup>st</sup> amendment) issues	2%	3%	2%
All of them	45%	39%	33%

Jews with low levels of involvement are significantly less likely than moderately or highly involved Jews to be familiar with the work that local Jewish organizations and congregations do to serve the Portland Jewish community.



## Community Perceptions

### How Well Audiences' Needs are Being Met (Mean Ratings)

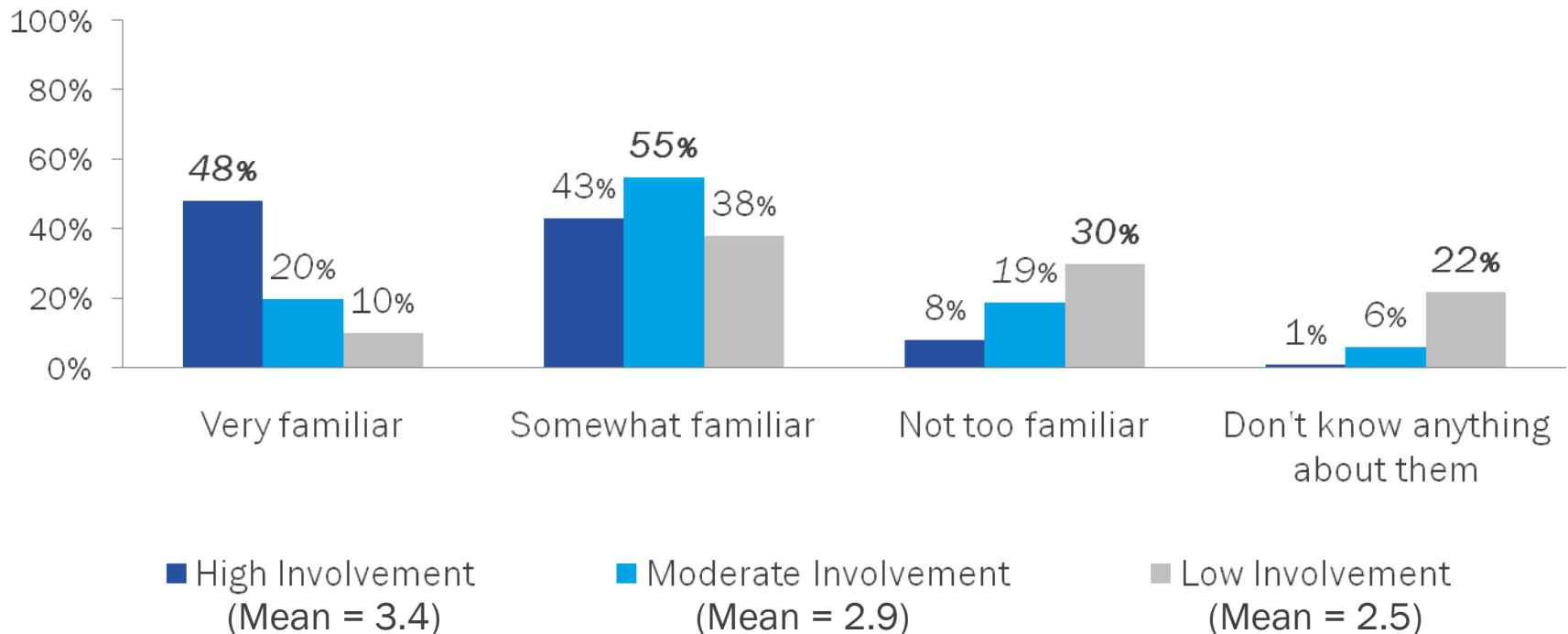
Top three audiences are consistently rated across each segment as those best served. While single adults are viewed as not being as well served. A large percentage were unable to assess how well these audiences are being served.

	High Involvement	Moderate Involvement	Low Involvement
Families with children	3.4* (11% DK)**	3.4 (21% DK)	3.2 (44% DK)
Children < 18	3.3 (16% DK)	3.2 (28% DK)	3.0 (53% DK)
Elderly or retired	3.0 (19% DK)	2.9 (30% DK)	3.0 (48% DK)
Empty nesters	2.7 (33% DK)	2.6 (38% DK)	2.1 (60% DK)
College age children	2.5 (32% DK)	2.5 (39% DK)	2.4 (59% DK)
Young adults	2.5 (30% DK)	2.6 (36% DK)	2.3 (50% DK)
GLBT	2.4 (47% DK)	2.5 (51% DK)	2.6 (67% DK)
Single adults	2.4 (40% DK)	2.3 (43% DK)	2.1 (54% DK)

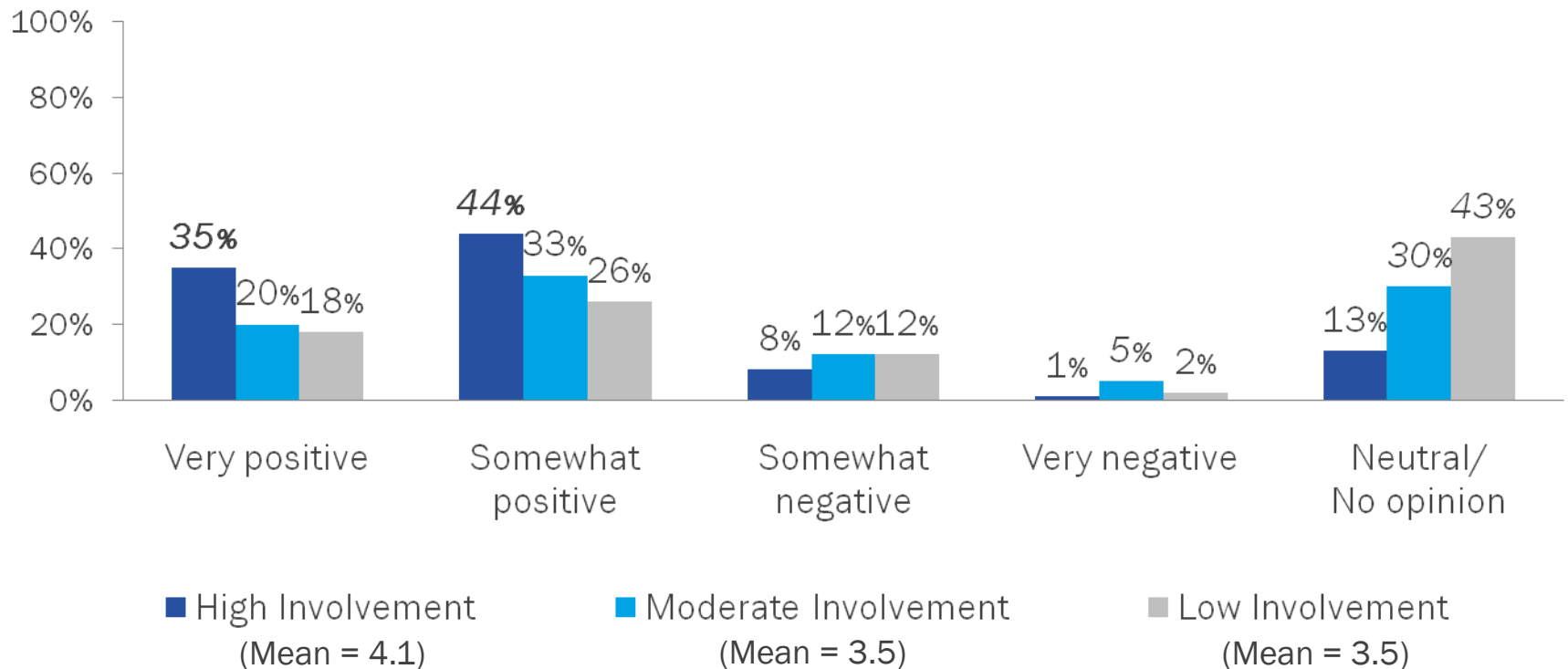
\* Mean ratings computed using a scale of 1 to 4 where 1="Not well at all" and 4="Very Well".

\*\* Don't know

Awareness of the Jewish Federation is markedly lower among Jews with low levels of involvement than among moderately or highly involved Jews.



Among those familiar with the Federation, the higher the level of involvement the more likely they are to have a positive impression of the organization. Those with lower levels of involvement are more likely to have a neutral view.



## Community Perceptions

How well do you think the Jewish Federation does in...?  
(Mean Ratings)

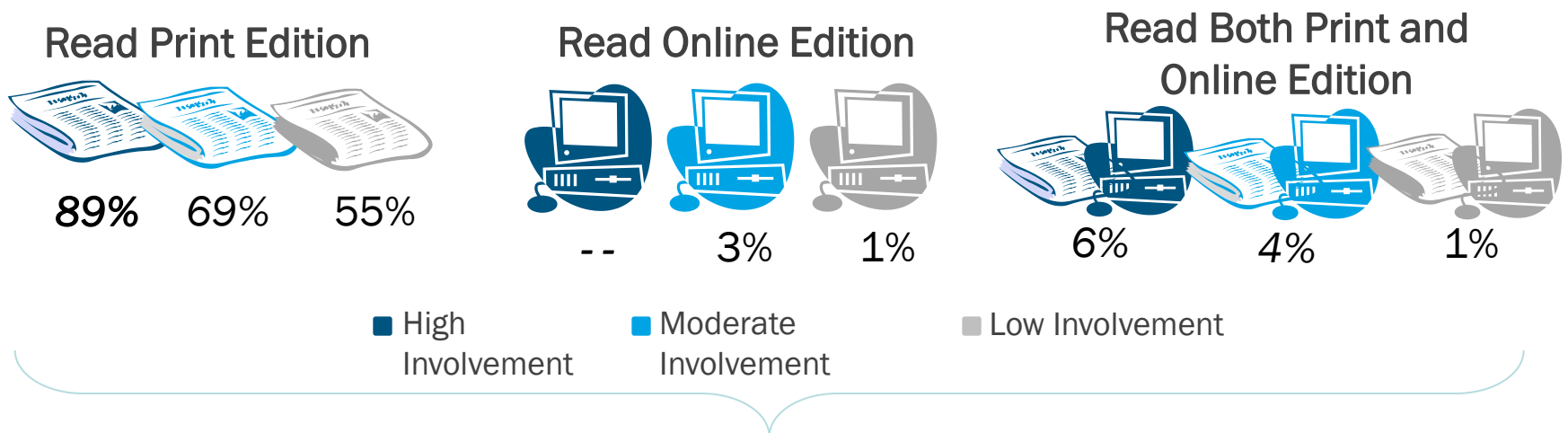
Those familiar with the Federation perceive it as doing well in all areas. Not surprisingly, the higher the level of involvement, the stronger the rating. Those with low involvement levels are more apt to be unsure.

	High Involvement	Moderate Involvement	Low Involvement
Raising funds for local and overseas needs	3.3* (10%DK)**	3.2 (35% DK)	3.2 (51% DK)
Disbursing/distributing funds for local and overseas needs	3.2 (17% DK)	3.0 (46% DK)	2.8 (64% DK)
Improving social services for the community	3.1 (13% DK)	2.9 (37% DK)	2.9 (46% DK)
Developing future leaders for the Jewish community	2.9 (26% DK)	2.8 (47%DK)	2.7 (59% DK)

\* Mean ratings computed using a scale of 1 to 4 where 1="Not well at all" and 4="Very Well".

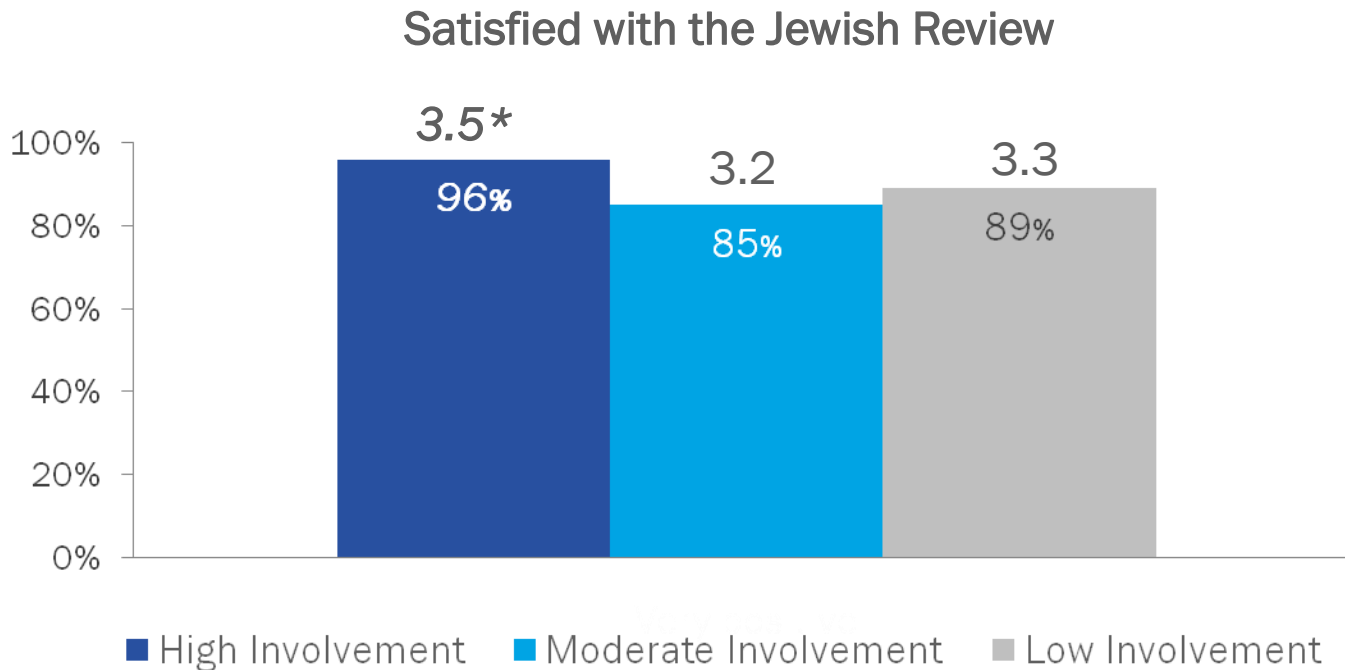
\*\* Don't know

The majority of all three segments read the Jewish Review print edition but only a small percentage read the Jewish Review online, and the majority of these readers still read the print version as well.



Across segments, the News articles and Calendar are most frequently read sections.

Satisfaction with the paper is high, especially among highly involved Jews.



\* Mean ratings computed using a scale of 1 to 4 where 1="Very dissatisfied" and 4="Very satisfied".

## Demographic and Opportunity Study

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Demography

Jewish Identity and Engagement

Jewish Education

Community Perceptions

**Social Services**

Volunteerism and Philanthropy

A large percentage of Jews don't know enough about JFCS to rate them. Among those who do, ratings are consistently positive across all three segments. In addition, the majority of all three segments would recommend their services.

	High Involvement	Moderate Involvement	Low Involvement
Service Quality (mean rating)	4.0*	4.0	3.7
Percent not sure	42%	58%	<b>71%</b>
Would recommend (% yes)	<b>77%</b>	64%	52%
Percent not sure	20%	31%	<b>42%</b>

JFCS's location is not a major impediment, as less than a quarter of each segment indicate that JFCS is inconveniently located.

\*Mean ratings computed using a scale of 1 to 5 where 1="Poor" and 5="Excellent".

Majority of those who have a moderate or low level of involvement are not familiar enough to rate Cedar Sinai's quality of care. Those who are familiar give very high ratings. The higher the level of involvement, the more important it is to receive care from a Jewish provider.

	High Involvement	Moderate Involvement	Low Involvement
Quality of care at Cedar Sinai Park (mean rating*)	4.5	4.5	4.2
Percent not sure	30%	57%	59%
Importance of receiving care from a Jewish provider/facility (mean rating**)	2.8	2.5	2.1

\* Mean ratings computed using a scale of 1 to 5 where 1="Poor" and 5="Excellent"

\*\* Mean ratings computed using a scale of 1 to 4 where 1="Not important at all" and 5="Very important".

The higher the level of involvement, the more likely Jews are to be familiar with the MJCC. Interestingly, Jews with moderate or low levels of involvement are less likely to find the location of the MJCC very convenient.

	High Involvement	Moderate Involvement	Low Involvement
<b>Familiarity with services</b>			
Very familiar	57%	34%	22%
Somewhat familiar	37	48	50
<b>Convenience of location</b>			
Very convenient	49%	27%	18%
Somewhat convenient	23	21	25
<b>Likelihood to join in the next three years</b>			
Very/somewhat likely	11%	8%	10%

## Demographic and Opportunity Study

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Demography

Jewish Identity and Engagement

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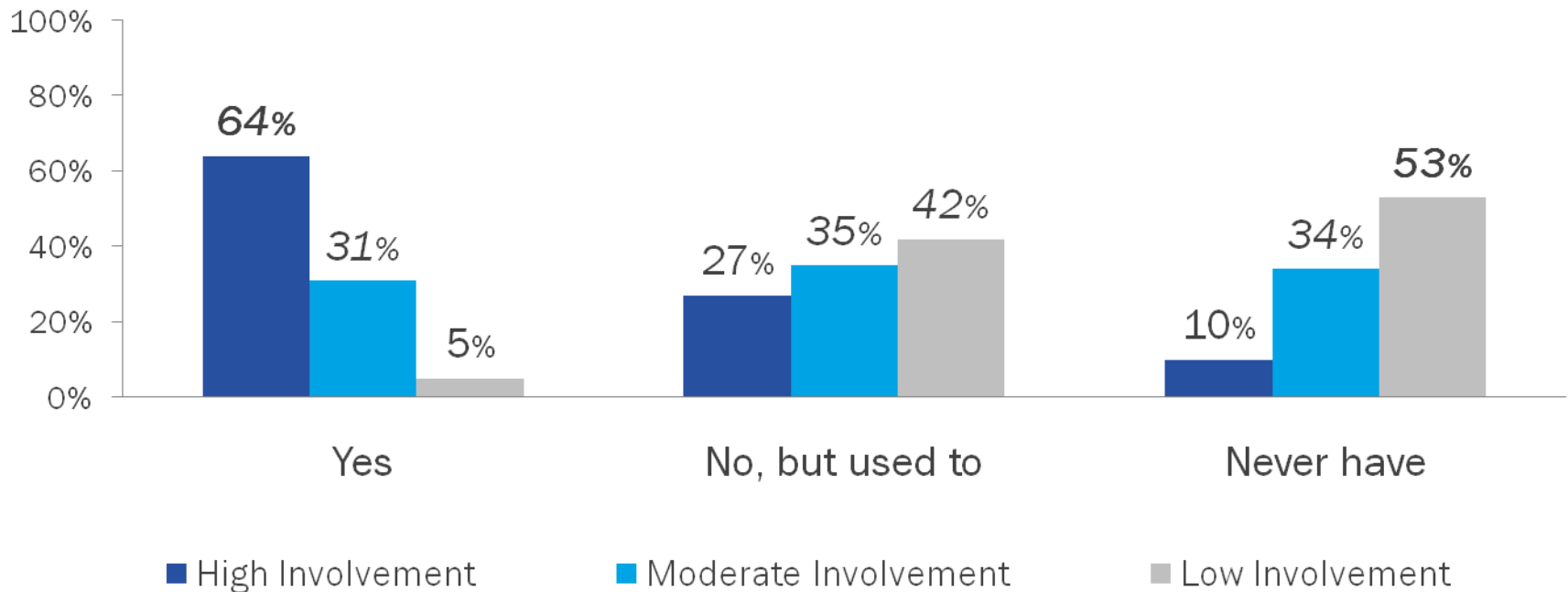
Social Services

**Volunteerism and Philanthropy**

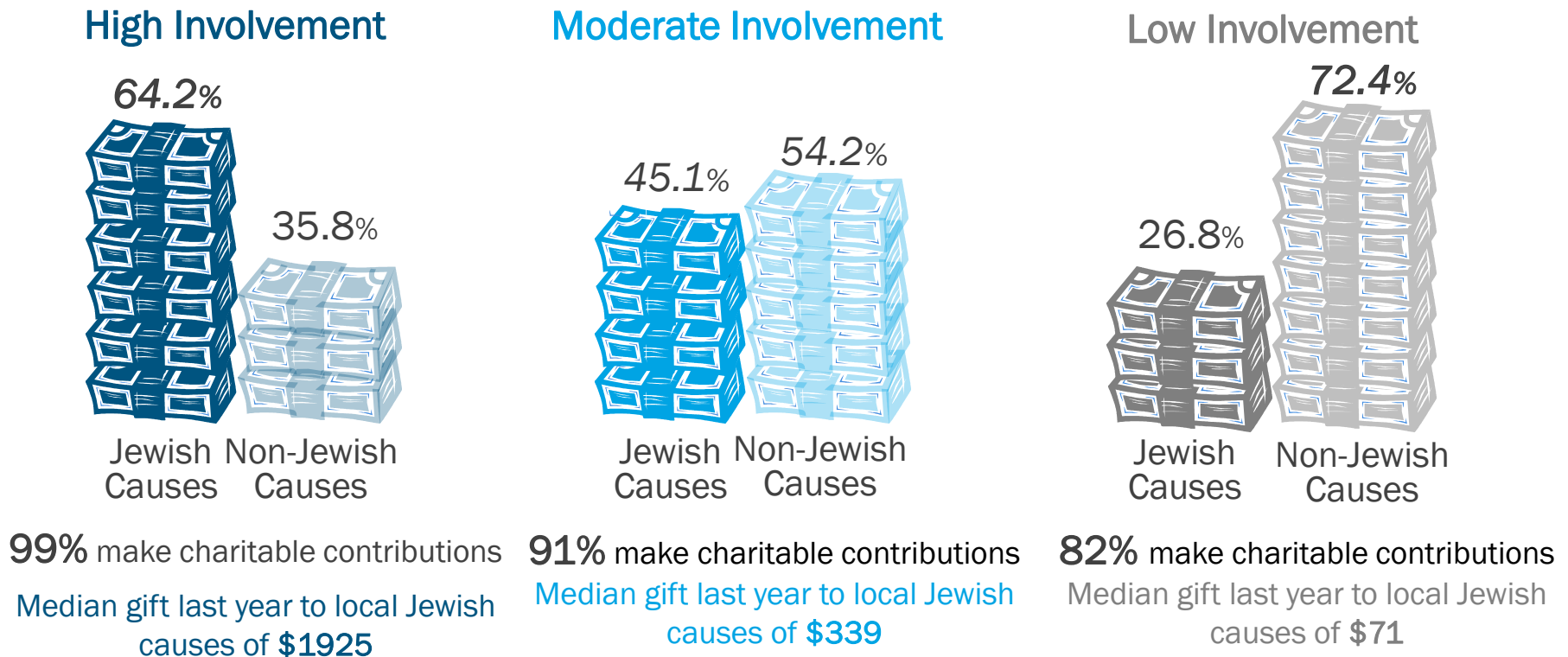
# Volunteerism and Philanthropy

## Volunteering to Jewish Causes

Almost two-thirds of highly involved Jews are currently volunteering their time for Jewish causes—this is twice as many as those who are moderately involved. Over half of all Jews who have low levels of involvement have never volunteered for a Jewish cause.



Not surprisingly, the higher the level of involvement, the more likely Jews are to make charitable contributions to Jewish causes and the larger the average gift size.



# Volunteerism and Philanthropy

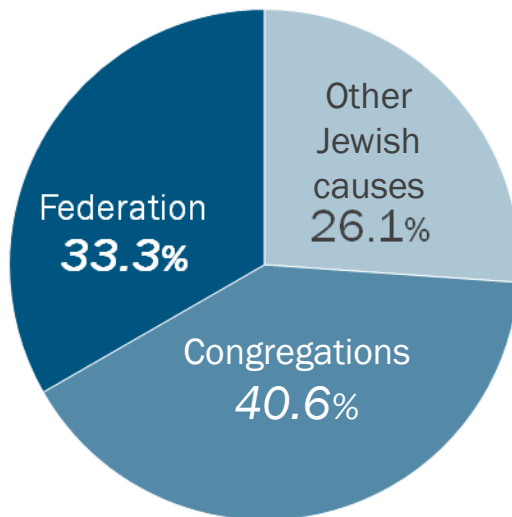
## Local Jewish Charitable Giving

(among those who contribute to Jewish causes)

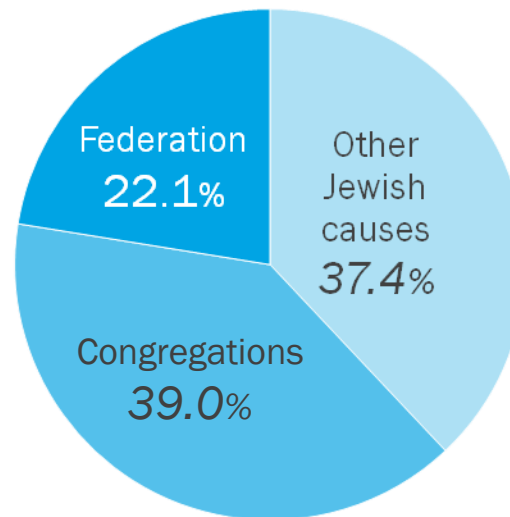
Highly involved Jews give a higher percentage of their gifts through Federation than other segments. Jews with a low level of involvement donate the majority of their gifts directly to other Jewish causes.

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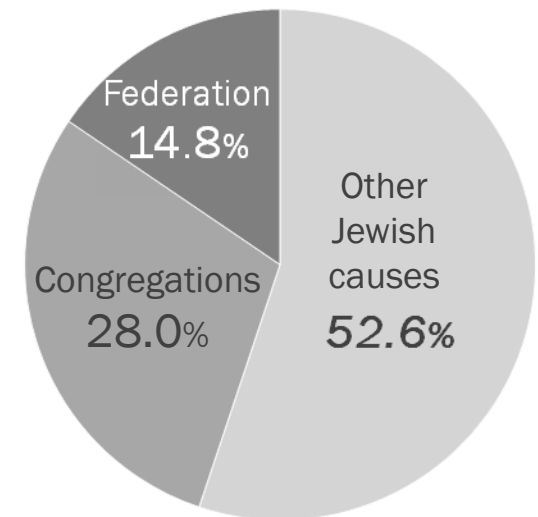
High Involvement



Moderate Involvement



Low Involvement



For those who give through Federation, top reasons for giving through Federation are consistent across segments.

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- Top reason given for why people donate through Federation is trust that the money will be distributed where it is most needed.
- Other main reasons to give through Federation include a belief in the efficiency and effectiveness of the Federation and a belief in the Federation's mission.
- Among those highly and moderately involved Jews who plan to participate in the Federation's next campaign, the majority plan to give the same amount as in the past.

# Volunteerism and Philanthropy

## Top Federation Funding Categories

While top four areas for Federation funding are consistent across segments, Jewish education is most important to those who are highly involved with the community.

	High Involvement	Moderate Involvement	Low Involvement
Jewish education	27%	17%	12%
Social services	25	24	28
Senior programs/services	20	28	30
Israel	12	7	7

## Demographic and Opportunity Study

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# **Interpretations and Conclusions**

Greater Portland's Jewish community is a growing, diverse population that includes a large number of Jews who are not traditionally involved with the community.

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- The estimated population of 47,500 is more than twice the size informally projected 20 years ago and includes a broad range of Jewish practice and beliefs, including interfaith households—living among the 47,500 are an estimated 12,500 non Jews.
- The known community is roughly 11,000 households, while the projected number of Jewish households is 27,700.
- Even within the known community, there is a sizable proportion of households that include people whose sense of Jewish identity is not being strengthened through traditional opportunities of involvement (synagogue and JCC memberships).

Jews with lower levels of involvement differ dramatically from those with higher levels of involvement demographically, attitudinally and behaviorally, which demonstrates the need for new approaches for reaching and engaging this audience.

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- Jews with lower levels of involvement are more apt to be unmarried, living in households with non-Jews, are newer to the Portland area and reside in areas not in close proximity to Portland Jewish organizations. They are far less likely to have children than those Jews with higher levels of involvement.
- As a group, they do not place a great deal of importance on being involved in the Jewish community, most of their friends are not Jewish and they rarely, if ever, attend services or other community events.
- They are far more likely to identify as a cultural Jew or a non-practicing Jew and more consider themselves reform than other denominations of Judaism.

To engage Jews with lower levels of involvement, consider the following recommendations for attracting this audience.

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- As the majority of Jews with low levels of involvement have mostly non-Jewish friends, programming must offer more than just an opportunity to socialize with friends.
- Given the fact that this audience is more likely to be living with non-Jews, consider development of more secular events or programs that are very welcoming and accepting of non-Jews.
- As the majority of Jews with low levels of involvement live outside of immediate area where Jewish services are located, develop more community-based events/programs (especially on the East side).

To engage Jews with lower levels of involvement, consider the following recommendations for attracting this audience.

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- Consider adding new programming for singles.
  - Even among highly involved Jews, there is evidence to suggest that Jewish organizations need to do a better job serving single adults, college-age Jews and young adults in general.
- Also, keep in mind that cost is considered a barrier for Jews with low and moderate levels of involvement, so ensure programming calendar includes no/low cost opportunities.
- Given the large number of recent arrivals, explore ways to enhance outreach to new residents.

Knowing why Jews with low levels of involvement chose not to affiliate does not tell us what changes need to be made to increase involvement.

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- Jews with low levels of involvement say they are too busy and/or are not interested in further involvement with the Jewish community.
- However, this survey did not explore ways in which this population may be engaging in informal or non-traditional ways or potential new ways in which this population might be open to engaging with the community in the future.
- Further research with Jews with low levels of traditional involvement is needed to understand how the Jewish community might be able to provide programs/activities that better fit their schedule and provide meaningful value.

Social programs should do the following to attract the broadest representation of the community:

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- Focus on cultural identity (over religious identity).
- Infuse cultural programming with more value—so perceptions of not having time to attend switch to “can’t miss!”
- Enhance Jewish experience of Hanukkah and Passover since these are the holidays universally celebrated.
- Since this study did not ask about High Holiday service attendance, further research should explore the value of potential opportunities to enhance this time of year as well.

Jews with low levels of involvement have a low level of awareness of the Federation and the work that it does.

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- Even among moderately involved Jews, less than a quarter are *very* familiar with the Federation, compared to nearly half of those who are highly involved.
- Impressions of the Federation among those who are aware are mostly positive or neutral. However, even among those who are highly involved, only about a third have *very* positive impressions.
- This suggests more work is needed to increase awareness among the community of the work the Federation does and to explore ways in which it can create stronger positive impressions among even the most involved.

Similarly, there is a low level of awareness of Portland's communal agencies.

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- People who know and use the services of Portland's communal agencies are satisfied.
- However, a large proportion, especially those with lower levels of involvement are unfamiliar with the agencies.
- Given the similar challenges faced by Federation and its constituent agencies, collaboration opportunities exist to increase overall awareness for communal services.