



The Catholic School Choice:

Understanding the Perspectives
of Parents and Opportunities for
More Engagement



A market research study measuring the general population's attitudes, opinions, and perceptions on Catholic education in America and what drives parents' decisions about educational choices for their children.



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Dear School, Diocesan, and Educational Leaders:

Your leadership builds and sustains the vitality of Catholic schools – there is no greater ingredient to Catholic schools' future success than your contributions, creativity, and commitment.

The mission to create thriving schools and students is not always easy. Sustaining and growing Catholic schools is a complex task. And, as the country's largest private provider of education, Catholic schools do not have a "one-size-fits all" answer to some of its greatest challenges.

One incredibly important part of this ministry and the process of evangelization is listening to and learning from parents, those currently engaged and those who are not engaged in Catholic school communities. As deciders of their child's education, parents are critical stakeholders in Catholic education. Their views and perceptions affect their decisions, which are important to Catholic schools' marketing, recruitment, curriculum, and overall growth and vitality.

National information on parents' perceptions outside our school system has been lacking, until now. *The Catholic School Choice* is a new, groundbreaking study designed to equip Catholic school leaders with national-level data on parents' perspectives of Catholic schools.

The study explores the key elements parents in the general population consider when choosing a school for their children and what biases they hold for or against Catholic schools. The research focuses on perceptions of the general public and primarily views from parents of children who are not enrolled in Catholic schools, revealing opportunities for improving and promoting Catholic education across a wide range of audiences.

This research focuses on perceptions of the general public and primarily views from parents of children who are not enrolled in Catholic schools.

The research both affirms and challenges Catholic schools. For example, quality education and moral formation are two key drivers in parents' school choices for their children. These findings, which affirm two hallmarks of Catholic school education, challenge Catholic schools to better communicate and tell their story to parents – especially parents who value the tenets of Catholic education but who may not have chosen a Catholic school for their children.

The data has already inspired a number of Catholic schools to implement new strategies or modify existing approaches, from instituting local research to implementing new curriculum. Some of these strategies and approaches are featured in Appendix C.

The research also exposes areas for further exploration, including the factors that influence perceptions of Catholic schools. More research could be done, for example, on how attitudes towards religion and other cultural influences affect parents' views toward Catholic schools.

The Catholic School Choice was a collaboration between the National Catholic Educational Association, Foundations and Donors Interested in Catholic Activities, and The Philanthropy Roundtable. The groups were collectively motivated by Catholic education's mission – a mission which flows from the Gospel and is defined by the Catholic Church.

The collaborative hopes the research **inspires** Catholic school leaders to creative solutions, concretely **impacts** enrollment and retention, and **invites** questions and further examination of Catholic education.

Sincerely,

Dr. Thomas W. Burnford
President and CEO
National Catholic Educational Association

Alicia Bondanella Simon
Director of Membership & Catholic Education
Foundations and Donors Interested in Catholic Activities

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An education in the fullness of humanity should be the defining feature of Catholic schools.”

-POPE FRANCIS

Executive Summary

In 2016, the National Catholic Educational Association (NCEA) and a group of funders partnered together to explore opportunities for strengthening the vitality of Catholic schools in the United States. As part of these efforts, the group commissioned a national research study to understand Americans’ attitudes toward Catholic schools today.

The group specifically sought to use the research to understand parents’ expectations of, preferences for, and perceptions toward different K-12 school types in the U.S. with a focus on Catholic schools. The research was also structured to explore specific views (including biases and misperceptions) toward Catholic schools and what they offer, and to spur discussion about how best to increase enrollment nationwide. Throughout this report we will refer to a Catholic school’s total offerings as its “product offering,” which includes its curriculum, environment, culture, faculty and staff, programs, and extra-curriculars, among other things.

The research was designed to answer the following key questions:

- How do Americans overall and parents of school-age children think about Catholic schools today?
- What are the reasons parents may or may not consider sending their child to a Catholic school?
- What are the perceived strengths and weaknesses of Catholic schools, and what is required to bridge those perception gaps?
- Which audiences, product offerings, and messages represent the best opportunity for increasing enrollment in Catholic schools in this country?

PRODUCT OFFERING:

In market research, the “product offering” (or sometimes just “offering”) is the total of what is offered to customers. For Catholic schools, the offering is the overall experience that includes curriculum, environment, culture, faculty and staff, programs, and extra-curriculars, among other things.

The research results suggest there is a clear opportunity to strengthen the position of Catholic schools in this country, in both the long- and short-term. This document provides an overview of key research findings which tell the following story:

1. Parents are well-informed, savvy consumers.

At a time when parents have more choices than ever before, parents spend time researching individual schools, a process which focuses heavily on individual school websites, in-person visits, and conversations with other parents in the community. While many feel their only “real” choice is to send their child to a public school (due to costs associated with private schools, lottery-based admissions, and/or geography), parents are looking for schools they believe offer the curriculum and learning environment that will best position their child for success in college and beyond in global society.

2. Catholic schools are viewed positively by most parents but are not considered the right option for their child. Cost and misperceptions about what Catholic schools offer are key barriers to enrollment. In fact, parents generally believe that Catholic schools place a greater emphasis on religious instruction than high-quality academics, which they believe will

put their child at a disadvantage in the future when applying to college and/or for a job.

3. Misperceptions about what Catholic schools offer run wide and deep. Most parents believe Catholic schools lack a strong, well-rounded academic curriculum (one that puts an emphasis on science and technology) as well as a diverse learning environment (both in terms of ethnic, religious, and academic diversity)—the same two elements parents believe are most important for their child’s ability to thrive and be successful in a global society. Hispanic parents are even more likely than white parents to associate Catholic schools with these shortcomings.

4. Parents want their children to develop strong morals and good values, at an early age. While parents recognize that Catholic schools do instill strong moral backgrounds in their students, parents are concerned these teachings are too rigid and prevent a child from considering different points of view or thoughts.

5. Concerns about the affordability of Catholic schools are prevalent. The affordability issue is compounded by a lack of awareness of tuition assistance programs nationwide (and specifically in school choice states). When parents are made aware of tuition assistance programs, they become significantly more willing to consider a Catholic school for their child.

6. A focus on religious instruction alone in external communications and marketing materials will not increase enrollment in Catholic schools. While parents value the intrinsic benefits of children learning about their faith, this is not considered a top priority for their child’s K-12 education today.

has been structured to serve as a guide for local educators and administrators as they consider ways to enhance the curriculum and environment (“the product”) of Catholic schools in their areas, increase enrollment in specific dioceses and/or individual schools, and optimize outreach to current and prospective families in their areas.

Readers are encouraged to approach this report with an open mind, allowing themselves to consider the research findings in a way that may challenge how they currently think about their schools and/or spur new ideas for how best to promote and secure the future of Catholic schools in their areas.

While national in scope, learnings from this research can be used to help illuminate opportunities for strengthening Catholic schools on a diocesan, network, and school level. As a result, this document

Project Genesis

Catholic education is at a crossroads in the United States today. The mission of Catholic education is to educate the whole child in mind, body, and spirit. However, consistent declines in enrollment and school closures in many parts of the country have overshadowed this purpose and challenged Catholic education for more than the last decade.

In most of the U.S., Catholic school enrollment statistics tell a challenging story. Since 2005, more than 20% of Catholic schools have closed (most of which have occurred in the Northeast and the Great Lakes) due in part to declining enrollment and lack of financial resources. In fact, the number of students enrolled in Catholic schools nationally continues to decline: according to data compiled by the NCEA, in the last year alone, enrollment declined nationally by 43,448 students—a 2.3% decrease from the previous academic year. These enrollment trends coupled with a well-documented decrease in church affiliation in the United States¹ have many Catholic school leaders and supporters concerned about the viability of Catholic education in the United States moving forward.

At the same time, however, there are glimmers of hope for Catholic schools—nearly one in three schools now boast waiting lists (most of which are in suburban areas) while 16 new schools opened this year (with more projected to open in the years to come)².

In June 2015, a group of philanthropists affiliated with Foundations and Donors Interested in Catholic Activities (FADICA) and The Philanthropy Roundtable began exploring how they could more effectively address challenges facing Catholic education today as a way to reverse negative enrollment trends. These donors, known as the Catholic School Philanthropy Working Group

(CSPWG), realized that to effectively invest their time and financial resources, they needed detailed information about how the general public perceives Catholic education, including a careful analysis of the necessary levers for improvement.

In January 2016, NCEA expressed interest in developing better marketing for Catholic schools nationally. Recognizing shared interests and goals, NCEA and the CSPWG identified the need for a robust, national market research study to better understand perceptions toward Catholic schools in the U.S. and to identify the greatest opportunities for improving perceptions of Catholic schools.

In mid-2016, CSPWG partnered with NCEA, and together, they gathered input from several superintendents and researchers.

The group identified three key areas of study for the research:

- **Who should Catholic schools target?** Which audiences (or groups of parents) represent the greatest opportunities for Catholic education today and moving forward?
- **What do parents want or require for their child's K-12 education?** What are parents' "requirements" for Catholic schools today? Where are Catholic schools exceeding, meeting, or falling short of these expectations? Where are additional investments needed?
- **How can we increase enrollment?** What attitudes or beliefs about Catholic schools do the best job of increasing consideration of Catholic schools among key parent segments? What are the decision-making drivers that can be leveraged?

¹Lipka, M., & Gecewicz, C. (2017). More Americans now say they're spiritual but not religious. Pew Research Center.

²McDonald, D., & Schultz, M. (2018). United States Catholic Elementary and Secondary Schools 2017-2018: The Annual Statistical Report on Schools, Enrollment and Staffing (pp. ix). Arlington, VA: NCEA.

Due to finite resources for this research (coupled with the costs associated with conducting research among different audiences), NCEA and the CSPWG also made the following decisions:

Multi-phase Research Method. The research would include both qualitative and quantitative research to ensure all pertinent areas were explored. The research would begin with qualitative one-on-one in-depth interviews and in-person focus groups to inform the development of the quantitative survey. The survey would be conducted via an online methodology to allow for a robust sample of interviews across a range of predetermined audience segments, ensuring the ability to conduct analysis across and among these groups in the most cost-efficient manner possible.

Target Audiences. The group determined this inaugural research study needed to provide, at a minimum, an in-depth understanding of two audiences they saw as critical to the growth of Catholic schools, especially in the short-term:

- **Catholic parents.** In the United States, this group represents a key target for Catholic schools as 81% of students³ currently enrolled in Catholic schools identify as Catholic. Furthermore, 40% of Catholic parents between 25 and 45⁴ (an age

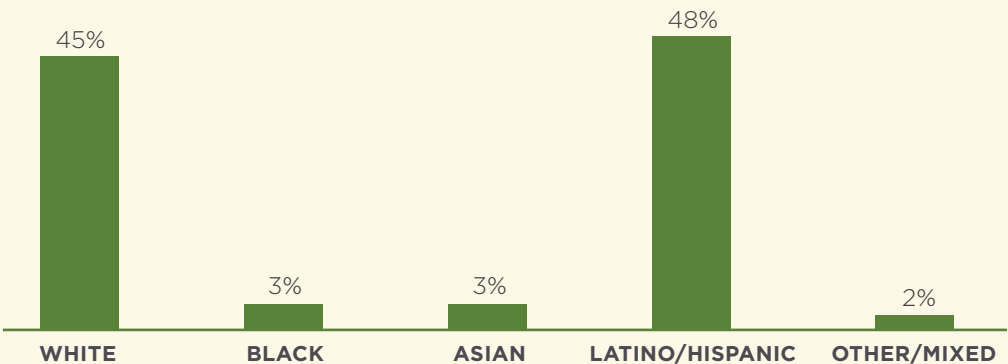
range that covers a large majority of parents with school-age children) identify as white, non-Hispanic Catholics.

- **Hispanic parents.** Hispanics as a group have been identified as significant to the growth and vibrancy of the Catholic Church in the U.S. Furthermore, according to the Center for Applied Research in the Apostolate report, *The Catholic Family: 21st Century Challenges in the United States*, 54% of Catholic parents are Hispanic or Latino. Hispanics also represent the largest group of racial and ethnically diverse students (17.4%⁵) currently enrolled in Catholic schools in the United States.

While other audiences were included in the research (e.g., Asian Americans, African Americans, those living in rural areas), the research was not designed to allow for detailed subgroup analysis among these groups. This is not to suggest that these audiences are not important to the CSPWG or to the future of Catholic schools. Rather, due to budget constraints, the CSPWG chose to first understand the perceptions among those parents and families who represent the largest opportunity in terms of volume for Catholic schools nationally—parents who do not currently have a child enrolled in a Catholic school, with a focus on white and Hispanic Catholic parents. Other groups may be studied in future research if and when funding is secured.

Racial and Ethnic Composition Among Catholics who are Parents

% of Catholics who are parents who identify as...



From Pew Research Center

³Ibid.

⁴Gray, M.M. (2015) *The U.S. Catholic Family Demographics: The Second Special Report* (p.10). Washington, D.C.: CARA and Holy Cross Family Ministries.

⁵McDonald, D., & Schultz, M. (2018). *United States Catholic Elementary and Secondary Schools 2017-2018: The Annual Statistical Report on Schools, Enrollment and Staffing* (pp. ix). Arlington, VA: NCEA.

Research Methodology

The research was conducted using a combination of qualitative and quantitative public opinion research methodologies. Public opinion research (also referred to as market or marketing research) is a tool frequently used by businesses and nonprofits alike to measure the opinion and perspectives of a large group of individuals, often to determine how best to influence a group to take action (e.g., purchase a product or service) or change how an audience thinks about a particular organization or issue (e.g., belief that Catholic schools offer a high-quality education). In other words, rather than relying on generalizations about a target audience, opinion research allows an organization to solicit feedback and opinions directly from members of a given audience.

Insights gleaned from public opinion research are often used to inform the development of a marketing communications strategy to effectively increase sales or engagement.

This opinion research was conducted to assess parent expectations, preferences, and perceptions related to their child’s education in order for Catholic schools to determine the most effective way(s) to influence parents’ consideration of a Catholic school for their child.

It is important to note that the research was not designed to focus on understanding attitudes and opinions of those parents who currently have a child enrolled in Catholic schools; rather, the goal was to understand how to increase enrollment among parents who do not currently have a child enrolled in a Catholic school. While the sample of survey respondents does include parents with a child enrolled in Catholic schools (6%), the size of this group is not large enough to allow for detailed quantitative analysis in the research.

To provide a complete and accurate understanding of perceptions of Catholic education in America today, the following multi-phase research program was implemented:

Quantitative Online Survey (Nationwide)

| | | |
|------------------------------|---|--------------|
| <i>Additional interviews</i> | Total Interviews | 1,403 |
| | American Adults, ages 18+ (base sample) | 501 |
| | Catholic Parents | 300 |
| | Non-Catholic Parents | 300 |
| | Hispanic Parents | 302 |

In-depth Stakeholder Interviews
• 8, 45-minute interviews

Focus Groups
• Parents: 14 groups (5 markets)
• High schoolers: 2 groups

Phase One: In-depth Stakeholder Interviews

In December 2016, MayHill Strategies conducted telephone interviews with eight individuals considered experts on the topic of Catholic education. This group included a mix of superintendents, principals/presidents, pastors, and industry specialists who promote Catholic education on a national level. All interviewees were identified by NCEA and CSPWG and invited to participate in the interviews by representatives from NCEA and FADICA. The results of these interviews were used to develop the key hypotheses and themes to test in the research.

Phase Two: Focus Groups

The next phase of research was designed to inform the development of the survey instrument through conversations with target parents (those with at least one child between the ages of three and 16) and high school students currently enrolled in Catholic schools. These qualitative discussions helped determine the right mix of questions and language to use in the online questionnaire. Given that high school students often play a role in influencing the decision of where they will attend high school, discussions with young adults currently enrolled in Catholic high schools were considered important to include and were used to explore specific drivers of satisfaction among students (which were used in developing messages targeting parents).

In January 2017, MayHill Strategies conducted a total of 14 in-person groups with parents, followed by two online groups with high school students. This phase of research was also structured to include participants (parents and high schoolers) living in states with school choice and those without school choice. The in-person groups took place in a wide range of geographic locations. A table including the target audiences and geographic locations of those groups is located in Appendix A.

All groups of parents included a mix of Catholics and non-Catholics, as well as genders and ages (of parents and children). Each parent group included a small number of parents with at least one child currently enrolled in a Catholic school so that we could begin to understand the differences in opinion between these parents and those who do not have a child enrolled in a Catholic school.

Groups with Hispanic parents were conducted by a bilingual moderator; respondents had the option of participating in the conversations in English and/or Spanish. All focus groups were held in a traditional focus group facility and lasted two hours, and participants were paid to take part.

Online discussion groups were held with high school students in 11th and 12th grades who currently attend Catholic schools and were structured to last 90 minutes. One group consisted of students attending school choice states, while the other group included students attending schools in non school choice states.

Phase Three: Quantitative Online Survey

The final phase of research consisted of an online survey of 1,403 adult Americans conducted between March 31 and April 11, 2017. To put this number in context of research standards, the media (in the U.S.) typically requires a minimum of 500 survey interviews for national polls that are released publicly. As such, a sample of more than 1,400 survey interviews is considered highly robust by industry experts and members of the media. We conducted additional survey interviews with Catholic parents, non-Catholic parents, and Hispanic parents to ensure our ability to conduct detailed analysis among these groups.

The profile of the sample (the demographic makeup of all respondents surveyed when aggregated) was adjusted (or weighted) to ensure it accurately reflected the demographic composition of the adult population of Americans overall.

The oversampled groups of parents (Catholic parents, non-Catholic parents, and Hispanic parents) were weighted down so that the size or proportion of each group is accurately represented within the overall sample. This step ensured the overall results were not skewed and misrepresentative of the general U.S. adult population. The weights used were based on data from the U.S. Census and the Pew Research Foundation.

To ensure the accuracy of the data, as well as our ability to distinguish differences between parents with younger vs. older children, **all respondents were instructed to think of one specific child while answering the survey questions⁶.**

If respondents had multiple school-age children, they were asked to think of a child of a specific age. For quality purposes, respondents had to then indicate the age of the child who was the basis for their responses.

CHILDREN VS. CHILD

Respondents were instructed to think of one specific child while answering the survey questions. When referring to research findings, “child” is used; when referring to the aggregated data, “children” is used.

⁶ Therefore, when referring to research findings, “child” is used; when referring to the aggregated data, “children” is used.

How to Use the Research Results

Key Considerations

The goal of sharing the results of the research is to equip school administrators and donors with quality data that can inform thinking and efforts to increase enrollment in Catholic schools on a diocesan, network, or individual school level, with a focus on:

- parent perceptions that need to be shifted and/or changed;
- specific school offerings to be introduced or improved; and,
- marketing communications required to increase awareness of schools, key offerings, and tuition assistance.

The results detailed in this report can also be used to guide discussions on a local level for an individual school or diocese. For example, the superintendent in the Diocese of Buffalo presented the research to several stakeholders (e.g., marketing and advancement directors, principals, and school boards) who are now assessing the way they communicate and their offerings. Examples of how other dioceses have used the research can be found in Appendix C.

It is important, however, that the research findings are viewed in the proper context so they can be understood and used appropriately. Outlined below are some key considerations for reviewing the contents of this research report.

Perceptions Define Parents' Reality

This research measured perceptions—the actual opinions, beliefs, and assumptions—of those surveyed on Catholic education K-12. That is, the research sought to explore **what** parents think and believe about Catholic schools and **why** they think the way they do.

Yet, just because parents believe certain things about Catholic schools does not make them true. That said,

REALITY OR PERCEPTION?

“I think there has always been an imbalance between science and the church [in Catholic schools]. They’ve kind of done more on the religious end than the scientific end because one is the Big Bang and the other one is the Garden of Eden.”

– Parent in Indianapolis

it is important for Catholic schools to understand parents’ perceptions, determine if they are accurate or inaccurate, and then identify how best to bridge any perception gaps through better communications strategies and/or enhancing or changing the school’s offering, where appropriate and within the Catholic mission of the school. This is a significant opportunity for Catholic schools as the process can lay the foundation for increasing enrollment and/or implementing improvements that can impact potential enrollees.

Given this, when reviewing this report, it is very important to remember that while the key takeaways of the research may not reflect the actual reality or situation of Catholic schools across the nation (and/or in your own area), the research: (1) defines parents’ current reality—one that determines why they may or may not be willing to consider a Catholic school for their child today and (2) identifies resources and efforts necessary to increase enrollment moving forward.

A (Highly) Competitive Environment

The K-12 education landscape is more competitive than ever, especially given the increase of alternative public schools, such as public charter and magnet schools. As a result, all schools—public and private—are working harder to capture and keep parents’ attention and persuade them to consider their school for their child. It has become even more challenging for private schools (or those with annual tuition fees, such as Catholic schools) to capture parents’ attention, given the pace in which families’ needs and desires change, coupled with the rising cost of higher education, something most families worry about and struggle to afford.

To adequately compete in today’s education marketplace, Catholic schools can bolster their enrollment strategies by integrating more marketing and business principles. Catholic schools can use these research results to guide the development of a communications strategy designed to promote a highly differentiated quality product and strategies to capture new customers and retain existing customers.

To this end, the research was structured to provide answers to many of the same questions corporations and nonprofits ask when developing sales and marketing communication campaigns:

- Is there a market for our product (Catholic schools)?
- Who are the core customer targets for Catholic schools?
- Are prospective customers (parents) familiar with the product being offered?
- Is our product (Catholic schools) meeting prospective customers’ expectations?
- In what areas are we (Catholic schools) failing to meet expectations?
- What strengths, if any, can be leveraged?
- What is required to increase customers’ (parents’) likelihood to consider our product (a Catholic school for their child)?

How Does this Research Apply to a Local Catholic School?

This research, while national in scope, generated findings that can also be used on a local level to guide thinking and highlight potential areas for concern or consideration for individual Catholic schools. It is important, however, to recognize which aspects of the research can be applied or utilized to assist local administrators and educators and which cannot. More specifically, the findings from the following key focus areas can be used to drive thinking as well as immediate change on a regional, diocesan, or school level, as outlined on the next page:

| National Research Key Focus Areas | Questions for Consideration Locally |
|--|---|
| Highlights parents' priorities for K-12 education broadly | <p>Does your school offer what parents want?</p> <p>Are you telling your story in a way that will resonate with target parents?</p> <p>Are these offerings prominently displayed in your communications to parents, including your website?</p> |
| Illuminates differences among key national parent segments | <p>What changes or investments need to be considered?</p> <p>Who are your target customers?</p> <p>Are you communicating in the same way to all of them?</p> <p>What changes or adjustments should be considered?</p> |
| Isolates areas of opportunities and weaknesses for Catholic schools | <p>Could these also be areas of concern for your school?</p> <p>Do you have assets that you are not leveraging or promoting?</p> |

At the same time, some of the research results will not apply perfectly on a regional, diocesan, or local (or individual school) level. This includes:

- Identifying and understanding specific target audiences on regional, diocesan, and/or local levels.** While many schools and dioceses may target similar types of audiences (e.g., Catholic families, Hispanic families), local administrators and educators cannot assume their specific target audiences have the same needs, preferences, or perceptions as those profiled in the national research.
- Extrapolating specific findings on a state, diocesan, or local level.** The research did not include enough survey interviews in each state or diocese to understand trends for Catholic schools on a micro-level. So, while these results cannot be treated as definitive or complete on a diocesan or local level, it can guide thinking at a local level. We have noted where perceptions differ significantly on a regional level, throughout the report.
- Understanding subsegments of the Hispanic population in the U.S.** The research was not designed to allow for in-depth analysis among Hispanics by nation of origin, location, generation, etc.
- Understanding non-Hispanic minorities and/or ethnically diverse audiences.** As stated earlier, it is also not possible to use this research to conduct analysis among specific minority and ethnically diverse audiences (e.g., African Americans, Asian Americans, Euro-Americans as well as immigrant Catholics from Africa, the Caribbean and other parts of the world).

Additional research will be required to address and fully explore the areas and audiences outlined above. See Future Research Questions on page 40.

Detailed Research Findings

The State of K-12 Education in the United States

The educational landscape has become increasingly competitive and parents have more choices and higher expectations for K-12 schools than ever before. Parents today place a premium on high-quality academics for their child's K-12 education.

To fully understand parents' perceptions toward Catholic schools, parents' expectations for their child's K-12 education (as well as their perceptions of the different school choices) is required. The combination of this information will determine if Catholic schools are currently positioned to meet parents' needs.

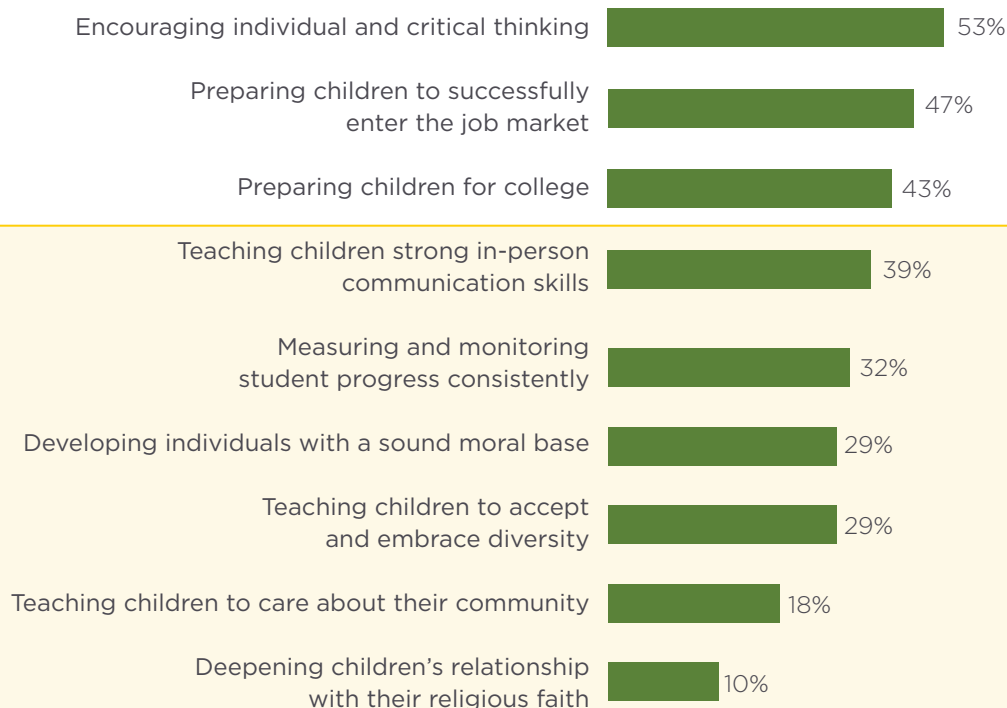
FINDING: Parents' priorities for their child's K-12 education are driven by the desire to set up their child for success in an increasingly competitive global society.

When asked to identify the three things they want the most for their child's K-12 education, an environment that encourages their child to think critically and individually tops the list. Ensuring their child is well prepared to enter the job market and college follow closely behind as a second-tier priority. Only one in 10 parents overall view religious instruction as a priority or top area of focus for their child's K-12 education.

Top Areas of Focus for K-12 schools

Among All Parents:

In your opinion, which of the following are the THREE most important areas of focus for K-12 schools in your area?



Q20

Note: Remainder Not Sure / Refused

These findings are in line with research conducted by the Pew Research Center in 2016 in association with the Markle Foundation. The Pew study found that six in 10 adults believe that K-12 education has *a lot* of responsibility in making sure the U.S. workforce has the right skills and education to be successful in today's economy. In contrast, fewer (but still a majority) felt the same about colleges and universities⁷.

When considering how these areas are rated by specific groups of parents:

- Catholic parents with older children (ages 13 – 17) are more likely to rate preparing children for college as a top priority (54%) than those with younger children (38% among those with children ages seven to 12, and 36% among those with children ages six and younger).
- Among Catholic parents with older children, encouraging individual and critical thinking is tied as the top area of focus.
- More Hispanic Catholic parents than white

Catholic parents identify deepening their child's relationship with their religious faith as a top priority for K-12 education (15% vs. 9%, respectively). As with other parent groups, however, this still falls to the bottom of the list of priorities rated among Hispanic Catholic parents.

FINDING: Religion is important but the perceived need for additional religious instruction appears to be lacking.

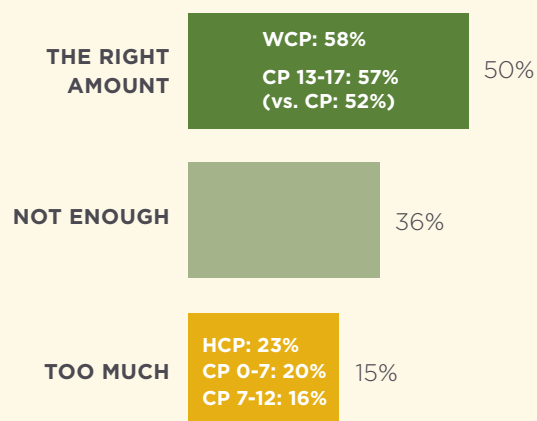
A strong majority of parents today value the role religion plays in their own daily lives and in the lives of their child—more than six in 10 parents say religion plays an important role in their lives (62%) and their child's lives (64%). The percentage is even higher among Catholic parents (68%).

That said, half of parents overall (50%) believe their child receives enough religious instruction, a sentiment held by even more white Catholic parents (58%). Just more than one in three (36%) say their

Parents' Views Towards Religious Instruction

Among All Parents:

In your opinion does your child receive too much, not enough or about the right amount of religious instruction?



Worship Attendance x
Child's Amount of Religious Instruction

| | THE RIGHT AMOUNT | NOT ENOUGH | TOO MUCH |
|------------------------------|------------------|------------|----------|
| Weekly or more | 34% | 27% | 76% |
| Monthly but less than weekly | 21% | 25% | 6% |
| Seldom | 21% | 33% | 2% |
| Never | 20% | 13% | 14% |

Q114

Remainder: Only on religious holidays

⁷Bialik, K. (2017). Most Americans say K-12 schools have a lot of responsibility in workforce preparation. Pew Research Center. Retrieved from <http://www.pewresearch.org/fact-tank/2017/08/25/most-americans-say-k-12-schools-have-a-lot-of-responsibility-in-workforce-preparation/>

child does not receive enough. Those parents who believe their child receives too much religious instruction (15%) are also most apt to be attending church once a week or more (76%).

Interestingly, low-income parents overall are significantly more likely than parents in a higher income bracket to feel their child does not receive enough religious instruction (40% vs. 32%). When considering Catholic parents specifically, the gap is even greater, with 48% of low-income Catholic parents believing that their child does not receive enough religious instruction (compared to 27% of mid- to high-income Catholic parents who feel the same). In fact, more than half (54%) of Catholic parents in a mid-to-high income bracket currently feel their child receives the right amount of religious instruction.

The reverse is true when considering non-Catholic parents. Among this group, low-income parents who are not Catholic are significantly more likely than their mid- to high-income peers to believe their child receives the right amount of religious instruction (55% vs. 43%). Still, only about a third of non-Catholic parents, regardless of income level, believe their child does not receive enough religious instruction.

FINDING: Parents generally believe the quality of K-12 education today has stagnated.

Nearly one in two adult Americans (47%) believe the quality of K-12 education has declined over the past 10 years while a quarter (26%) believe it has improved. Another quarter (27%) feel the quality remains the same.

Those groups most apt to believe the quality of K-12 education in this country has declined include:

- White adults: 51%
- Those living in suburban areas: 52%
- Gen X-age parents: 54%
- Low-income parents: 53%

Hispanic Catholic parents are significantly more likely (51%) to believe the quality of K-12 education has improved over the past decade.

Views toward K-12 education in respondents' own areas do not fare much better. While fewer believe the quality of K-12 education in their area has worsened over the past ten years (32% vs. 47% nationally) when compared to the national average, Americans are more likely to believe the quality has remained the same (39%) than improved (28%). When asked directly to rate the quality of K-12 education in their area relative to the national average, just more than a third (36%) consider it about the same as the national average (while the remaining 54% are split between thinking it is above or below the national average).

Changes in curriculum appear to fuel negative views toward K-12 education in the U.S. today. Complaints about a lack of focus on foundational academics and a move to the Common Core were mentioned most often.

Changes in curriculum cited most often as reason for decline in quality of K-12 education in the U.S.

Among All Respondents

| Why do you say the quality of K-12 education in the U.S. is “worse” than 10 years ago? | All |
|--|-----|
| Not teaching the basics (cursive, reading, basic math, etc.) | 20% |
| Common Core | 15% |
| Lack of funding | 13% |
| Too much standardized testing | 12% |
| Children are less intelligent/learn less | 11% |
| Children don’t graduate with skills needed to find a job | 10% |
| Political issues | 7% |
| Poor teachers | 7% |
| Teachers don’t care | 6% |

Q15

Responses greater than 5% shown. Remainder: Other/Not sure/General negative.

“Common Core is ridiculous! They need to get back to the basics. Kids are over tested & all the teachers do is prepare them for tests instead of actually teaching them.”

.....

“We do not have quality certified teachers and the quality of education being given to children is very poor. They do not have the skill sets that previous generations were given and they study for tests rather than material.”

To the extent Americans believe the quality of K-12 education has improved, the use or introduction of technology and “better” teachers were the top reasons cited.

Advances in technology, along with “better” teachers, are cited among those who think the quality of K-12 is better today.

Among All Respondents

| Why do you say the quality of K-12 education in the U.S. is “better” than 10 years ago? | All |
|---|-----|
| Computers/tech. | 22% |
| Better teachers/teaching methods | 19% |
| Children are learning more | 14% |
| Better curriculum | 11% |
| More options/choices | 10% |
| College prep/advanced classes | 7% |

Q14

Responses greater than 5% shown. Remainder: Other/Not sure/General positive.

“There are many more teaching methods being used than there were in the past, thus giving students of varying intellectual strengths and capacities more opportunities.”

.....

“I think the general use of technology in the classroom allows for a greater and more diverse set of learning materials that can better prepare children for the future.”

“Kids are learning more in school, different ways of solving problems and harder subjects than before.”

.....

“Teachers are required to do so much more to earn and keep their teaching credentials. The amount of training and workshops to benefit the students has increased tremendously.”

FINDING: Impressions of the different school types in this country are generally positive overall, which includes Catholic schools.

Adult Americans are generally favorable toward the various school options available in the U.S., but strong (or intense) positive feelings are lacking across the board:

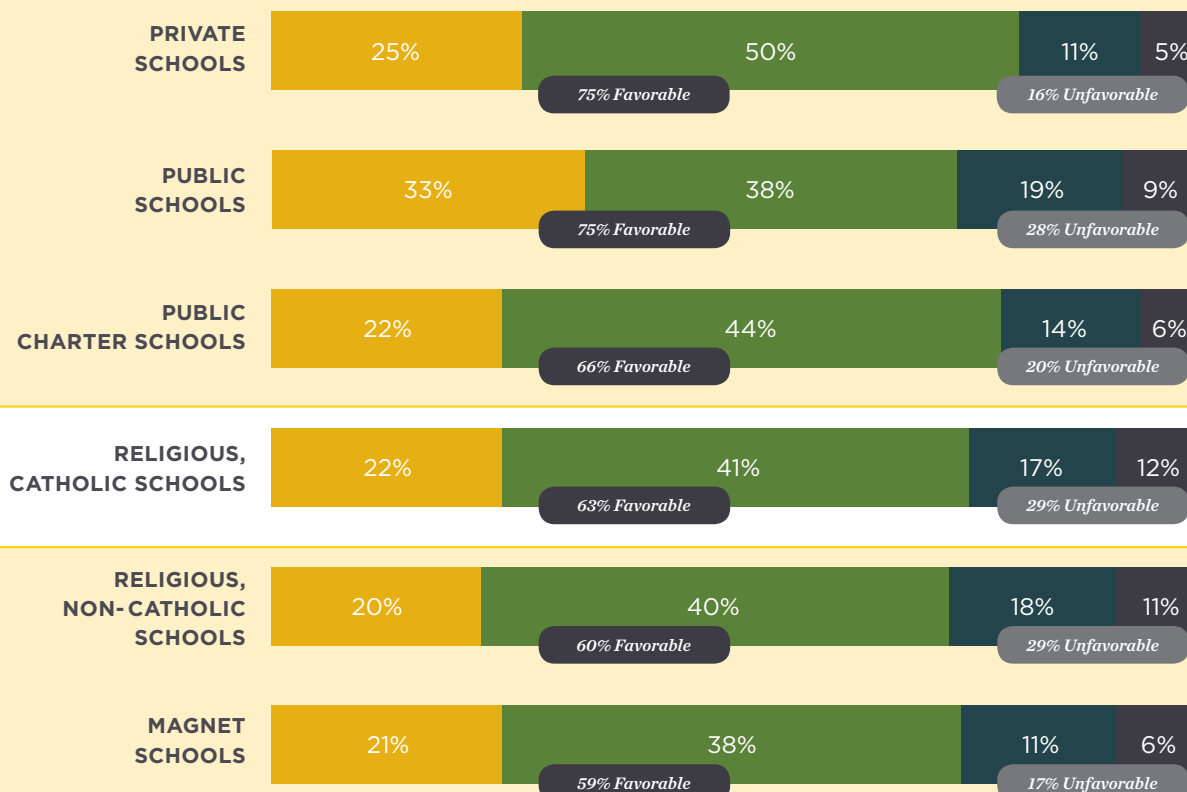
1. **Private schools** generate the highest favorable scores overall (75% favorable).
2. **Public schools** overall fall close behind with just over seven-in-ten (71%) Americans feeling favorable.
3. **Public charter schools** fall into third place, with more than two-thirds (66%) reporting favorable feelings.
4. **Religious schools**—Catholic and non-Catholic religious schools—fall into fourth place with about six in 10 feeling favorable (63% and 60%, respectively).
5. **Magnet schools** generate lower favorable ratings, with just more half (59%) reporting favorable feelings. It is worth noting, however, that a full quarter of respondents (24%) indicated they did not know enough about magnet schools to rate them.

It is also important to note that all school types tested generated double-digit negative scores, with public and religious schools (Catholic and non-Catholic schools) generating the highest negative scores (28% and 29%, respectively).

Favorability by School Type

Among All Respondents

● Very Favorable ● Somewhat Favorable ● Somewhat Unfavorable ● Very Unfavorable



Q40-45

Remainder: Never heard/Don't know

Catholic schools through a Catholic Lens:

Not surprisingly, Catholic schools achieve the most intense positive scores among Catholic parents, and particularly white Catholic parents (45% and 48% saying “very” favorable, respectively). Hispanic Catholic parents feel more intensely positive toward magnet schools (43%) and Catholic schools (40%). They also appear more intensely positive toward public charter schools than other parent groups.

Views toward Catholic schools differ somewhat based on income level. While views toward Catholic schools are positive regardless of income level, parents in the mid- to high-income brackets are significantly more favorable (overall, and when considering those who are very favorable) than those in the low-income bracket. The same trend holds true when just considering Catholic parents by income bracket.

| Favorability toward Catholic Schools | Parents Overall | | Catholic Parents | |
|---|-----------------|-----------------|------------------|-----------------|
| | Low Income | Mid/high income | Low Income | Mid/high income |
| % saying “very favorable” | 21% | 32% | 39% | 47% |
| % saying “somewhat favorable” | 35% | 36% | 34% | 38% |
| Total Favorable (% saying “very” plus “somewhat” favorable) | 56% | 68% | 73% | 85% |

FINDING: “Public schools are free / have no tuition” is the most common way parents describe their reason for sending their child to public schools.

According to research published by the *Center for Public Education*, 87% of school-age children attend public school of some kind⁸.

% of U.S. students in grades K-12 enrolled in each type of school

| | |
|------------------------|------------|
| Total public school | 87% |
| Public | 71% |
| Other (public)* | 8% |
| Charter | 4% |
| Magnet | 4% |
| Private | 10% |
| Home schooling | 3% |

**Includes students who may attend a non-neighborhood public school*

Regardless of where they send their child to school, two-thirds of parents overall (66%) are satisfied with their child’s current school; however, only one in three (33%) are very satisfied. Among those surveyed who currently send their children to public school, just more than half are satisfied with their school of choice (58%).

So why are so many parents choosing to send their children to a public K-12 school? Simply put: because

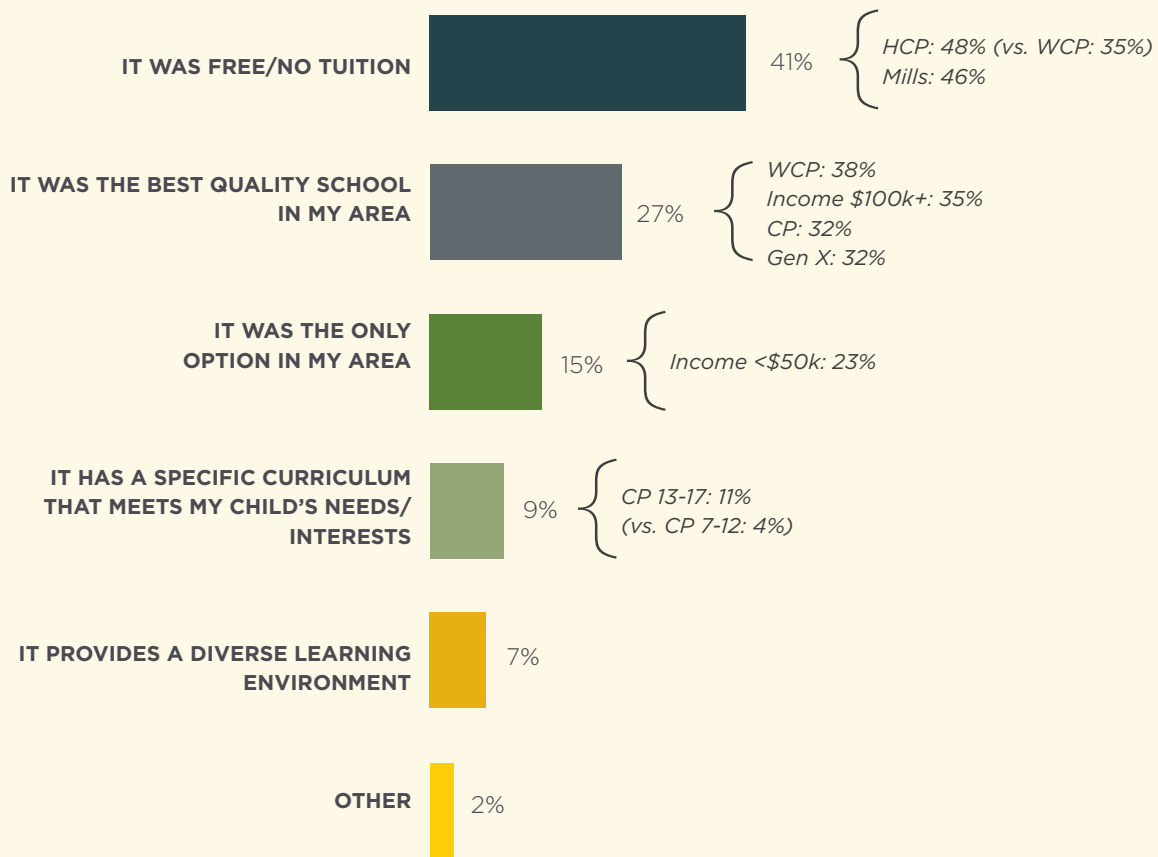
it is free (mentioned by 41% of parents with a child in a public school, the most commonly stated reason for choosing a public school for their child).

Hispanic Catholic parents are even more inclined than white Catholic parents to say they chose a public school for their child because it was free (48% vs. 35%, respectively). The other prominent reason, falling into a distant second place, is that the school was the *best quality in the area*.

Why Choose Public? It's Free.

Among All Parents with Children in Public School

Which of the following best describes why you chose to send your child to a public school?



Q31

FINDING: More than three quarters of Catholic parents are willing to consider a Catholic school.

One in two of all parents are willing to consider a Catholic school for their child. It is not surprising that Catholic parents overall are the group most likely to be willing to consider a Catholic school for their child (77% likely to consider a Catholic school vs. 39% of non-Catholic parents). Catholic parents are *two times more likely* to be *very willing* to consider a Catholic school for their child than non-Catholic parents (44% vs. 19%, respectively). White Catholic parents and Hispanic Catholic parents are equal in being *very likely* to consider a Catholic school for their child (45% vs. 41%, respectively).

Majorities of parents are willing to consider different types of schools for their child, including a private or religious school (such as a Catholic school). Parents surveyed are most inclined to consider a public school for their child (79%), with public charter and private schools falling into second place, with more than two in three parents *willing* to consider these type of schools (65% and 64%, respectively).

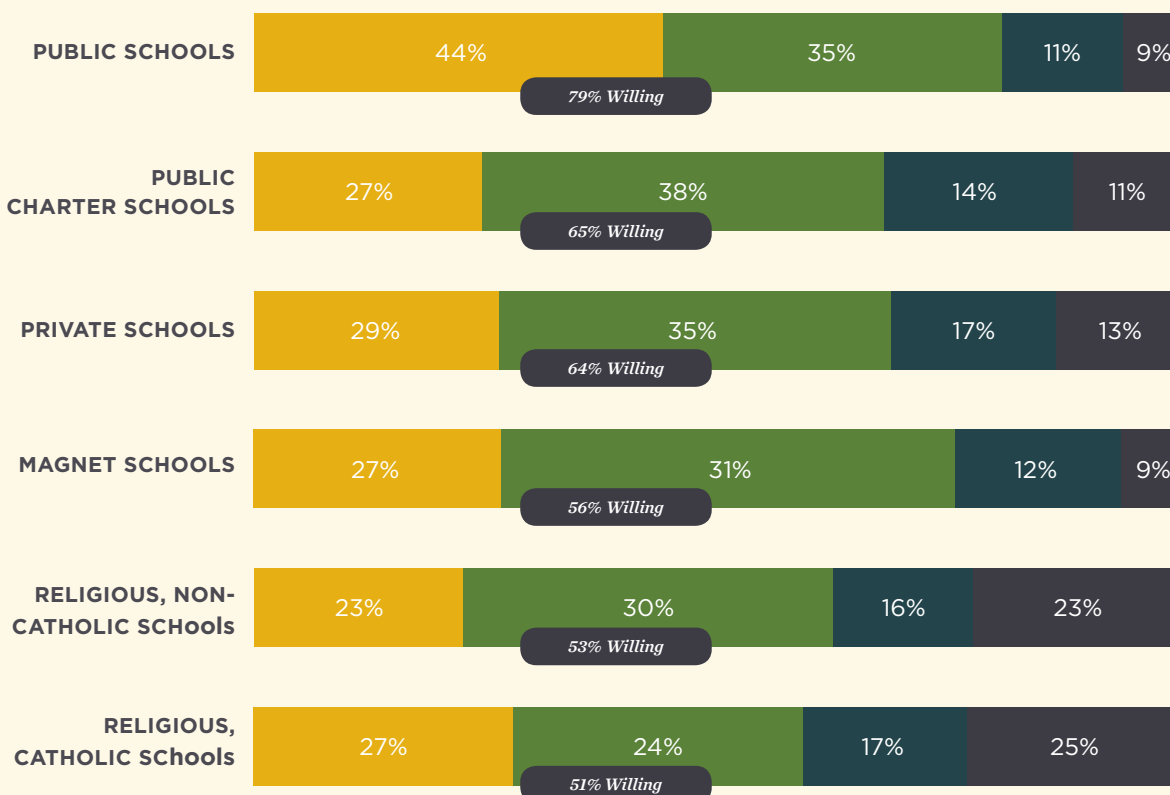
Socio-economic status also appears to play a role in consideration among Catholic parents. Once again, Catholic parents with a mid- to high-income are

Likelihood to Consider Different School Types

Among Parents

How willing, if at all, are you to consider sending your child to one of the following types of schools for grades K-12 in your area in the future?

Very Willing Somewhat Willing Somewhat Unwilling Very Unwilling



Q46 – Q51: [If Parent]

significantly more likely than low-income Catholic parents to be *very willing* to consider a Catholic school for their child (47% vs 36%, respectively).

When we look more closely at the group of Hispanic parents who are willing to consider Catholic schools for their child, we find they are more apt to be active Catholics, live in a choice state, and be aware of tuition assistance programs.

Hispanic parents willing to consider Catholic schools also appear to have a stronger desire for their child to be educated in an environment that embraces and reflects their Latino culture and traditions. That said, a school where the faculty and staff are bilingual is a priority to more Hispanics than a school where the majority of students, faculty and staff are Hispanic:

- A faculty and staff who are bilingual is a priority (55%)
- A school where the majority of students is Hispanic is a priority (34%)
- A faculty and staff that are Hispanic is a priority (25%)

Hispanic parents not willing to consider Catholic schools are concerned their child will be *brainwashed* (32%) or not receive a good education (24%) if they were to attend Catholic schools.

When researching schools, parents are most apt to rely on school **websites** and **parents of children attending the schools** being considered.

When asked directly, half of parents whose child is currently enrolled in a public school (54%) have considered sending their child to a private or religious school in the past, namely for *smaller class sizes* and *strong character instruction/development*. For those parents who have removed their child from a public school (and into a private or religious school), they are most apt to have done so for the same reasons – a lack of character/moral development and above average class sizes.

When asked directly about the strengths and weaknesses of their child’s school, regardless of parents’ satisfaction with these schools, the following themes emerged:

Among All Parents

What is the BEST thing about your child’s school?

- Good teachers (24%)
- Strong student/teacher relationships (15%)
- “Better” curriculum (14%)
- Individual teaching/one-on-one attention (8%)

What is ONE thing you would change about your child’s school?

- Decrease class size (too large) (11%)
- Improve curriculum (make more challenging) (10%)
- Increase individualized teaching/one-on-one attention (10%)
- Recruit better teachers (10%)

“Very structured curriculum; emphasis on languages, science and math, but also has a strong creative (art & music) component; religious instruction and sports team round out the educational emphasis.”

“Teachers are so involved. They do talent shows and have dances, etc. It’s a true community. The teachers at this specific school are happy to be there and love the kids.”

Quotes from open-ended survey questions 27 & 28

Views toward Catholic Schools

FINDING: Familiarity with Catholic schools and what they offer is lacking nationwide.

FINDING: Familiarity with Catholic schools and what they offer is lacking nationwide.

There is widespread confusion about the role religious instruction plays in Catholic schools today. When asked the open-ended question, When you think specifically about Catholic schools in this country that serve grades K-12 overall, what are the first words or images that come to mind? Please be as specific as possible, survey respondents replied:



The above word cloud illustrates the words and images that are top-of-mind when Americans are asked to think about Catholic schools in this country. The more often a word is mentioned by respondents, the larger the word appears in the image. Respondents were not provided with a list of words to choose from when asked this question; rather, this image reflects words that respondents came up with on their own.

As indicated in the image above, Catholic schools today remain closely associated with words and images that convey religious topics or themes. Words such as **Jesus**, **Bible**, **religious**, and **Christian** are what come to mind first for most Americans when they think of Catholic schools.

Words such as **morals, academics** and **small-class size** are also mentioned, but more respondents are likely to use words with negative connotations such as **strict, brainwashing** and **expensive**.

FINDING: The focus on religious instruction at Catholic schools appears to be both an asset and a liability for these schools in America today.

While some view religious instruction as the foundation through which good, strong character is developed, others believe it fosters a rigid learning environment where students are not encouraged to develop their critical thinking skills.

While religious instruction is seen as a benefit of Catholic schools, it is also a concern for many.

Among All Respondents

What is the greatest advantage of sending a child to Catholic school?

All

| | |
|--------------------------------------|-----|
| Religious/Christian/ Bible/God/Jesus | 20% |
| Better education/quality education | 14% |
| Small class size | 12% |
| Train morals | 11% |
| Academics | 7% |
| Discipline | 6% |
| Nothing | 11% |
| Not sure/refused | 9% |

What worries you most about sending a child to Catholic school?

All

| | |
|---------------------------------------|-----|
| Religious brainwashing/indoctrination | 27% |
| Expensive | 9% |
| Poor education | 8% |
| Lack of diversity | 8% |
| Abuse/sex abuse | 6% |
| Nothing | 22% |
| Not sure/refused | 7% |

Q58 & 59

"All" responses greater than 5% shown

Non-Catholic parents are significantly more likely to express concerns about religious brainwashing or religious indoctrination at Catholic schools (33%), while Catholic parents are more concerned about the cost (17%). Concerns about cost are expressed by even more Catholic parents with children ages 13 to 17 (23%).

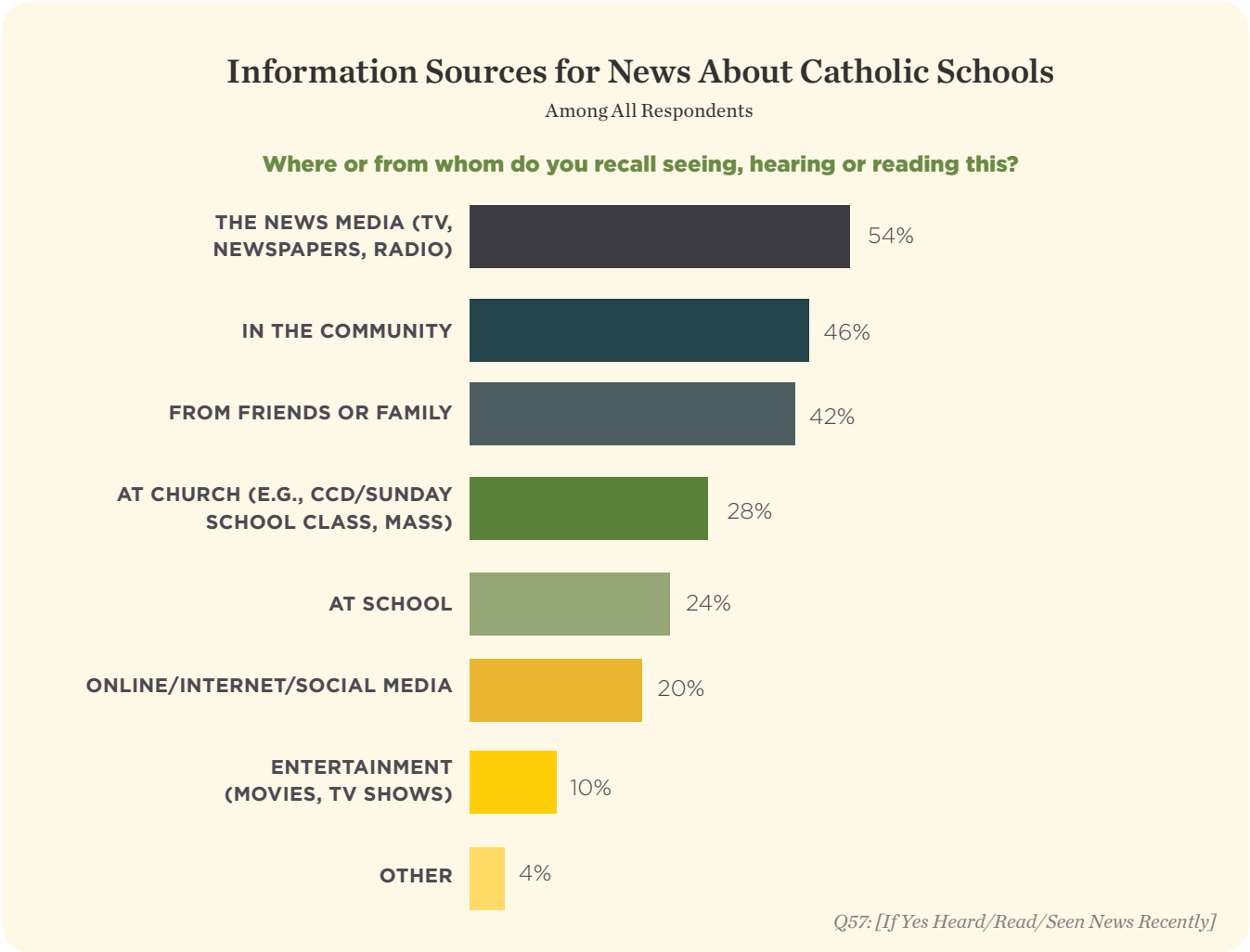
FINDING: Few Americans say they feel very knowledgeable about Catholic schools and what they offer.

Despite these very definitive descriptors of Catholic schools, few Americans say they feel very knowledgeable about Catholic schools and what they offer. While half of Americans (51%) feel knowledgeable about Catholic schools overall, less than one in five (13%) feel very knowledgeable. Slightly fewer feel knowledgeable about Catholic schools in their own area.

While Catholic parents feel more knowledgeable about Catholic schools than non-Catholic parents, still only a third of Catholic parents feel “very” knowledgeable (36% overall, and 38% for Catholic schools in their area). Knowledge of Catholic schools is more intense among Catholic parents with younger school-age children:

| How knowledgeable do you feel, if at all, about Catholic schools in your area? | Catholic parents with a child under the age of 7 | Catholic parents with a child under the age of 13 | Catholic parents with a child between the age of 13 and 17 |
|--|--|---|--|
| % saying they feel “very” knowledgeable | 41% | 47% | 29% |

For the few who do recall hearing something recently about Catholic schools, the majority say their source was the news media (TV, newspapers, and radio), not their church or someone they know and trust. In fact, anecdotal feedback from the qualitative phase of research suggests that parents rely heavily on information provided by other parents in the local community when researching schools for their child. These results suggest that Catholic schools appear to be missing a very cost-effective opportunity to promote what they offer at the local level.



It is worth noting that social media is a powerful tool that also appears to be an underleveraged asset for Catholic schools:

- A social media audit, conducted in concert with the national survey, showed that Catholic Schools Week is the biggest driver of online discussion about Catholic schools, the majority of which is positive. During this one week per year, Facebook (92%) is by far the largest channel for discussion, followed by Twitter (5%), Instagram (2%), and news outlets (1%). This suggests that Catholic schools are only utilizing social media to tell their story during Catholic Schools Week.
- When it comes to social media, Catholic schools are discussed at the same level/frequency as private schools. That said, the volume falls significantly below the broader school conversation.

Drivers of Consideration

FINDING: The perceptions that have the greatest impact influencing (or driving) parents' consideration are centered on academics and the learning environment. That said, drivers of consideration differ across different parent groups.

A series of attributes were also tested as part of this survey to understand how Catholic schools are defined in the mind of parents. In other words, the research sought to identify which attributes are most closely aligned or associated with Catholic schools in parents' minds (versus those that are not strongly associated with Catholic schools).

Respondents were asked to rate each attribute using a seven-point scale, where a seven means the attribute describes Catholic schools completely and

a one means the attribute does not describe Catholic schools at all. To isolate the most important drivers of consideration—that is, those perceptions or beliefs that are most likely to influence or persuade a parent to consider a Catholic school for their child (the desired outcome)—a statistical technique known as driver analysis was employed⁹.

DRIVER ANALYSIS

The process used to measure the relationship between potential influences (certain perceptions of Catholic schools) and a target outcome (likelihood to consider a Catholic school).

Although the research clearly indicates that religious instruction is seen as a defining feature of Catholic schools in the minds of parents, it is not the attribute that does the most to drive consideration.

The research unveiled that the following perceptions toward Catholic schools, when combined, have the greatest impact on increasing parents' willingness to consider Catholic schools:

- Offers a good balance between academics and religious teachings
- Creates an environment where everyone is welcome
- Places an emphasis on community service and volunteerism

The more likely parents associate Catholic schools with these three attributes, the more likely they are to consider a Catholic school for their child.

⁹Logistical regressions were utilized to identify the drivers of top box ("very") consideration.

This statistical analysis also revealed that different segments of parents are influenced by slightly different beliefs about Catholic schools. While there are some overlapping themes, this suggests that communications targeting specific segments of parents will need to be nuanced to address specific drivers of consideration:

Drivers of Consideration Among Parents Overall

Most Predictive Drivers of Consideration
(Top Box/“Very Willing”)
Results of Logistic Regression Analysis

| Parents |
|--|
| Provides a good balance between academics and religious teachings. |
| Creates an environment where everyone is welcome. |
| Places an emphasis on community service/volunteerism. |

Drivers of consideration across parent groups differ.

Most Predictive Drivers of Consideration
(Top Box/“Very Willing”)
Results of Logistic Regression Analysis

| Non-Catholic Parents | Catholic Parents | White Catholic Parents | Hispanic Catholic Parents |
|--|--|---|---|
| Offers a diverse learning environment. | Places an emphasis on community service/volunteerism. | Places an emphasis on community service/volunteerism. | Creates an environment where everyone is welcome. |
| Provides adequate resources for students with learning challenges or disabilities. | Creates an environment where everyone is welcome. | Provides strong character development. | Uses the latest technology and teaching tools in the classroom. |
| | Provides a good balance between academics and religious teachings. | Creates an environment where everyone is welcome. | |

Common attributes color coded

Barriers to Enrollment

FINDING: The greatest barriers to increasing enrollment at Catholic schools are parents’ concerns (or misperceptions) about the product as well as a lack of confidence they can afford the cost of tuition.

While the balance of views toward Catholic schools overall are favorable, negative views toward the product appear entrenched—a finding that is also observed among Catholic parents. For example, parents value the moral foundation Catholic schools provide but the schools are not perceived as meeting their expectations for their child’s education, as evidenced via the bullet points below. More

specifically, majorities of parents (including Catholic parents) also agree with the following statements:

- “Catholic schools are too rigid in their teachings and do not encourage students to express their own opinions.” (66%, and among Catholic parents 56%)
- “Catholic schools place too much emphasis on religion and not enough on academics.” (56%, and among Catholic parents 53%)
- “Catholic schools lack diversity.” (58%, and among Catholic parents 55%)
- “Catholic schools are exclusive, and do not create an environment that is welcoming to minorities.” (55%, and among Catholic parents 51%)

Negative Views about the Product

Among All Respondents

**Below are some statements about K-12 Catholic schools.
Please indicate how much you agree or disagree with each.**

● Strongly Agree ● Somewhat Agree

Recent changes in society and technology mean students need a firm moral background – something that Catholic schools provide

25%

49%

Catholic schools are rigid in their moral teachings and do not encourage students to express their own opinion

24%

41%

Catholic schools place too much emphasis on religious teachings and not enough on academics

20%

33%

Catholic schools lack diversity, both in terms of student population and its teachings

20%

34%

Catholic schools are most often a last resort for families today – they are chosen when the quality of public schools in a given area is poor and families can't afford other private schools

20%

33%

Catholic schools are exclusive – they do not create a welcoming environment for minorities or those with different beliefs or lifestyles

19%

34%

The curriculum taught in Catholic schools is incompatible with today's global job market which puts a heavy emphasis on math, science and technology skills

16%

27%

Catholic schools do not adequately prepare students for the real world

14%

23%

Teachers at Catholic schools are less qualified than those teaching in the public school system

10%

18%

Q89-97

There also seems to be conflicting views toward Catholic schools between white and Hispanic Catholic parents. Hispanic Catholic parents are even more likely to hold these views than white Catholic parents, with the biggest area of disagreement around the curriculum taught at Catholic schools:

- While 65% of Hispanic Catholic parents agree that the curriculum taught in Catholic schools is incompatible with today's global job market which puts a heavy emphasis on math, science, and technology skills, only 40% of white Catholic parents feel the same.
- Nearly seven in 10 (68%) Hispanic Catholic parents believe that Catholic schools place too much emphasis on religious teaching and not enough on academics while only 43% of white Catholic parents feel the same.

Hispanic Catholic Parents appear to hold more critical views of Catholic schools than their white peers

Below are some statements about K-12 Catholic schools. Please indicate how much you agree or disagree with each.

| % Agree with the following statements (Top 2 Boxes) | All Parents | Non-Catholic Parents | Catholic Parents | White Catholic Parents | Hispanic Catholic Parents |
|---|-------------|----------------------|------------------|------------------------|---------------------------|
| Recent changes in society and technology mean students need a firm moral background - something that Catholic schools provide | 78% | 75% | 86% | 86% | 86% |
| Catholic schools are rigid in their moral teachings and do not encourage students to express their own opinion | 66% | 72% | 56% | 49% | 64% |
| Catholic schools lack diversity, both in terms of student population and its teachings | 58% | 60% | 55% | 52% | 63% |
| Catholic schools are most often a last resort for families today - they are chosen when the quality of public schools in a given area is poor and families can't afford other private schools | 57% | 59% | 57% | 50% | 66% |
| Catholic schools place too much emphasis on religious teachings and not enough on academics | 56% | 60% | 53% | 43% | 68% |
| Catholic schools are exclusive - they do not create a welcoming environment for minorities or those with different beliefs or lifestyles | 55% | 58% | 51% | 44% | 61% |
| The curriculum taught in Catholic schools is incompatible with today's global job market which puts a heavy emphasis on math, science and technology skills | 51% | 53% | 51% | 40% | 65% |
| Catholic schools do not adequately prepare students for the real world | 44% | 46% | 47% | 37% | 59% |
| Teachers at Catholic schools are less qualified than those teaching in the public school system | 37% | 40% | 37% | 33% | 45% |

FINDING: The perceptions identified as having the greatest impact on driving or increasing parents' consideration of Catholic schools are not those which parents closely associate with Catholic schools in this country.

Parents are most likely to affiliate Catholic schools with offering the following:

- Deepening students' personal faith;
- Being a place where parents play a major role;
- College preparatory courses; and
- A safe learning environment.

Parents are least likely to ascribe these offerings to Catholic schools in this country:

- A diverse learning environment;
- Having a strong arts program;
- Cutting-edge science and technology instruction; and
- Providing adequate resources for students with learning challenges and disabilities.

Parents' perceptions about what Catholic schools do or do not offer directly affect their consideration of Catholic schools. The attributes that are currently most closely associated with Catholic schools are not the same attributes that drive willingness to consider Catholic schools. (See previous section, *The State of K-12 Education in the United States*, for findings on drivers.)

The image on the following page shows Catholic schools' average ratings for each attribute tested among all respondents. The arrows denote which of the attributes are drivers of consideration. The goal for Catholic schools, when targeting prospective parents or families, is to achieve the highest attribute ratings for those attributes identified to drive consideration.

Currently, Catholic schools are not closely associated with the perceptions that drive consideration

< Least to most descriptive >

Most Descriptive of Catholic Schools

All

> Indicates a consideration driver

Mean Ratings

| | |
|--|-----|
| Designed to deepen students' personal faith. | 5.8 |
| Encourages parents to play an active role. | 5.7 |
| Offers college preparatory courses. | 5.6 |
| Offers a safe learning environment. | 5.6 |
| Offers a challenging academic curriculum. | 5.5 |
| Has small class sizes. | 5.5 |
| Consistently measures students' progress and achievement. | 5.5 |
| > Provides strong character development. | 5.4 |
| > Fosters a strong sense of community. | 5.4 |
| > Has highly-trained faculty and staff. | 5.4 |
| > Places an emphasis on community service/volunteerism. | 5.3 |
| > Provides a good balance between academics and religious teachings. | 5.2 |
| Develops students' individual talents and abilities. | 5.2 |
| > Uses the latest technology and teaching tools in the classroom. | 5.1 |
| Has updated facilities/school building. | 5.1 |
| > Creates an environment where everyone is welcome. | 5.0 |
| Has a strong after-school sports program. | 5.0 |
| Encourages independent and critical thinking. | 5.0 |

Most Strong Association

| | |
|--|-----|
| > Provides adequate resources for students with learning challenges or disabilities. | 4.9 |
| Offers cutting-edge science and technology instruction. | 4.9 |
| Has a strong performing arts program. | 4.9 |
| > Offers a diverse learning environment. | 4.8 |

Least strong Association

Q67 – Q88: Based on what you know or have heard, please indicate how well each of the following describes K-12 Catholic schools today in your area. (N=1403)

Among Hispanic Catholic parents the top descriptors of Catholic schools were that they are designed to deepen students’ personal faith and encourages parents to play an active role. The descriptor has a strong performing arts program received the lowest rating.

Interestingly, Catholic schools generated higher ratings overall from parents in the mid- to high-income brackets when compared to their low-income peers overall. Based on further analysis of these groups, we believe the lower ratings among low-income parents are due more to a lack of knowledge of Catholic schools than negative experiences or biases.

Concerns about Cost

FINDING: Most American parents do not believe Catholic schools are affordable, and they are not confident they could afford the cost of tuition.

The other significant (but not surprising) barrier to consideration is the cost of Catholic schools.

Low-income parents, regardless of religious affiliation, are significantly more likely than their mid- to high-income peers to believe the cost of Catholic schools are not affordable:

Parents’ confidence in their ability to afford Catholic schools also varies significantly across geographic and demographic groups.

- More than half of those living in the Northeast and the West are confident they can afford the cost of tuition at a Catholic school (54% and 57%, respectively).
- The reverse is true when considering those living in the Midwest and the South, with majorities not confident they can afford the cost of tuition at a Catholic school (56% and 58%, respectively).
- While more than six in 10 Catholic parents (63%) are confident they can afford the cost of tuition, more than half (57%) of non-Catholic parents are not confident.
- Hispanic Catholic parents are as likely as white Catholic parents to believe Catholic schools are affordable and feel confident they can afford it. However, Hispanic parents are also more likely than white Catholic parents to believe the cost of a year of Catholic school is less than \$1,000 (24% vs. 11%, respectively).

| Is the cost of sending a child in grades K-12 to a Catholic school affordable for families such as yours? | Catholic Parents | | Non-Catholic parents | |
|---|------------------|-----------------|----------------------|-----------------|
| | Low Income | Mid/high income | Low Income | Mid/high income |
| Yes | 24% | 55% | 12% | 36% |
| No | 60% | 37% | 55% | 39% |
| Not sure | 16% | 9% | 33% | 25% |

The ability for Catholic schools to increase parents' confidence in affording tuition costs is compounded by the low awareness of programs available to assist parents in paying tuition at private schools (e.g., subsidies, state vouchers, tax credits).

FINDING: Awareness of state-sponsored tuition assistance programs (e.g., vouchers and tax credits) is low, even among those living in states where they are offered.

Of those living in a school choice state¹⁰, only one in three (34%) are aware they do in fact live in a state that had passed school choice legislation. The remaining did not think they live in a school choice state (14%) or admitted they did not know.

The same trend held true when considering those living in non-school choice states: only one in five (20%) knew for certain that they do not live in a school choice state. Another three in 10 residents (31%) believe they live in a school choice state when they do not and the remaining half (49%) did not know.

The majority of Americans are unaware if their state has passed school choice legislation. Parents in the low-income bracket are significantly less likely to know if they live in a school choice state than mid-to high-income parents. This is true among Catholic and non – Catholic parents. The exception is Hispanic Catholic parents – more than half of this group (58%) is accurately aware they live in a school choice state.

| Do you currently live in a school choice state? | Catholic Parents | | Non-Catholic parents | |
|---|------------------|-----------------|----------------------|-----------------|
| | Low Income | Mid/high income | Low Income | Mid/high income |
| Yes | 38% | 54% | 32% | 51% |
| No | 12% | 20% | 17% | 19% |
| Not sure | 50% | 27% | 52% | 30% |

FINDING: The research reveals that there is a measurable relationship between those who feel confident they can afford a Catholic school and their willingness to consider it for their child.

The proportion of parents willing to consider Catholic schools increases as the level of their confidence in their ability to afford the tuition increases. If parents who are not confident in their ability to afford tuition knew their child qualified for subsidized or discounted tuition (including but not limited to school choice vouchers), it increased their likelihood to consider Catholic schools.

¹⁰Current school choice states include: Maine, New Hampshire, Rhode Island, Vermont, Pennsylvania, Indiana, Ohio, Wisconsin, Iowa, Illinois, Kansas, Minnesota, South Dakota, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, Alabama, Mississippi, Tennessee, Arkansas, Louisiana, Oklahoma, Arizona, Colorado, Montana, Utah, and Nevada.

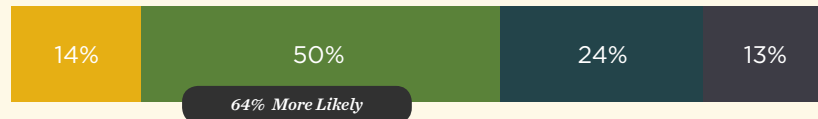
Information about tuition subsidies increase likelihood to consider Catholic schools.

Among All Parents Not Confident They Can Afford Catholic School

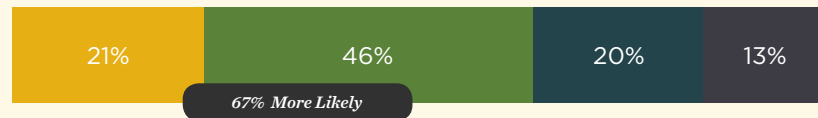
Q: If you knew...would this make you more or less likely to consider sending your child to a Catholic school

● Much More Likely
 ● Somewhat More Likely
 ● Somewhat Less Likely
 ● Much Less Likely

MOST FAMILIES DON'T PAY FULL TUITION



RECEIVE SUBSIDIZED OR DISCOUNTED TUITION



| % much more likely | Full tuition | Subsidized/ discounted tuition |
|---------------------------|--------------|--------------------------------|
| Non-Catholic Parents | 11% | 15% |
| Catholic Parents | 20% | 33% |
| White Catholic Parents | 19% | 31% |
| Hispanic Catholic Parents | 21% | 35% |

| % much more likely | Full Tuition | Subsidized/ discounted tuition |
|--------------------|--------------|--------------------------------|
| NE | 14% | 26% |
| MW | 17% | 25% |
| South | 13% | 17% |
| West | 12% | 18% |

Q65 & 66

Research Conclusions

Key Questions and Answers

Is there a market for Catholic schools? Yes.

Satisfaction with public schools is lacking, and parents feel empowered to seek out better quality K-12 education options for their child. While concerns about tuition costs weigh heavily on the minds of many parents, a majority are open to considering a Catholic school for their child.

Are Americans, and parents specifically, familiar with the product? No.

Catholic schools suffer from a low profile in this country. In fact, most receive the little information they do about Catholic schools from the news media, not from their parish or individual schools. Due to a lack of proactive communications promoting Catholic schools and what they offer, familiarity with the product is shallow. This lack of knowledge has fueled speculation and misperceptions about Catholic schools' mission and success educating children in this country which appears to have deterred parents from considering Catholic schools.

Is the product meeting expectations?

It is not perceived to be.

Parents do not generally associate Catholic schools with what they want for their child—a learning environment that encourages individual and critical thinking as well as one that will prepare their child for success in college and a global job market. Catholic schools, however, are not perceived to perform highly in these areas, with most believing that religious instruction comes at the expense of academic excellence.

Where do parents perceive Catholic schools are failing to meet expectations?

Academic rigor and diversity in the classroom.

There is a prevailing belief among parents that Catholic schools place more emphasis on religious

instruction and less on academics. Catholic schools are thought to be particularly weak in STEM as many believe that a modern science curriculum conflicts with teachings of the Catholic Church (and are therefore avoided). Parents also feel strongly that Catholic schools lack a diverse learning environment. This encompasses the makeup of the student body (in terms of ethnicity, religious affiliation, socio-economic standing, and learning needs) as well as in its teaching. The research suggests parents believe Catholic schools have not evolved at the same pace as society, and as a result, is very narrow in its teachings and beliefs.

What strengths can Catholic schools leverage? Strong character development for its students.

Catholic schools are widely known for providing a safe environment where students receive individualized attention in small class settings and strong character development grounded in good morals and values. Character development, however, seems to set Catholic schools apart from other private and specialized public schools (e.g., public charter schools and magnet schools). Furthermore, parents recognize a need for their child to have a strong moral background in light of recent changes in society and technology.

What's required to increase parents' consideration? Proactive, targeted communications.

Catholic schools have an opportunity to increase enrollment in the short-term using targeted communications that bridge knowledge and perception gaps:

Information about tuition assistance programs –

Parents today, even those in middle- to high-income brackets, worry about how they will pay for their child's college tuition. Focus group participants reported that the cost of their child's K-12 education

was a concern for this reason. Catholic schools can work to assuage these concerns by promoting information about local tuition assistance programs, particularly in choice states.

Targeted, nuanced messages to increase consideration

– Catholic schools should focus external communications around those themes that do the best job persuading parents to consider a Catholic school for their child. While different groups of parents will be influenced by somewhat different messages, the themes that Catholic schools should focus on, particularly when targeting Catholic parents, include:

- Catholic schools offer a good balance between academic and religious instruction, including Catholic schools' focus on academic excellence, including STEM.
- Catholic schools offer an environment where everyone is welcome (a diverse environment that reflects different schools of thought, cultures, beliefs, and learning needs).
- Catholic schools place an emphasis on community service and volunteerism; Catholic schools create good local community and global citizens.

What role does religious instruction play today in Catholic schools? An important one.

While a focus on religious instruction alone will not persuade parents to consider a Catholic school for their child, parents recognize the benefits of a faith-based approach Catholic schools take to educating child. That said, communications from individual schools (via websites and marketing materials) that place too much (or an above average) emphasis on religious information and visuals will likely reinforce existing perceptions that Catholic schools do not offer a high-quality academic curriculum—the type parents believe is necessary to ensure their child are set up for success in the future. Moving forward, Catholic schools need to strike the right balance between promoting academic strengths and achievements and commitment to Catholic identity.

Who are the core customers for Catholic schools? All families.

That said, Catholic families, particularly those in middle- to upper-income brackets, represent the best target for increasing enrollment in the short-term. These families feel more positive toward Catholic schools, are most likely to consider Catholic schools, and feel confident they can afford the cost (and are less likely to require subsidies from individual schools). The research also suggests:

White Catholic families – There is ample opportunity among white and Hispanic Catholic families. That said, Catholic schools are likely to have an easier time increasing enrollment among white Catholic families in the mid- to high-income brackets than their Hispanic peers, at least in the short-term.

Hispanic Catholic families – Hispanic families represent a vital target for Catholic schools in key areas over time. However, Hispanic Catholic parents appear to have higher expectations for Catholic schools, which may be driven by cultural tradition or societal pressures. Regardless of the reason, the research suggests it may take more time and resources to meet Hispanic parents' requirements than it will to persuade white Catholic parents to consider a Catholic school for their child.

Parents in choice states – Parents in choice states also represent a prime target in the short-term given the availability of tax credits, vouchers, and other tuition assistance programs offered by the state. In these states, Catholic schools will be best served by working to increase awareness of their schools as well as tuition assistance programs offered by the state and the school. A degree of education should also be offered to help parents navigate program applications and requirements. Enlisting the support of pastors to promote Catholic schools (with a balanced message of Catholicity and academic excellence) will be instrumental in reaching families in the pews.

Families with low incomes – There is a particular need among low-income families to have access to

better quality schools. This group is more likely than middle- to high-income parents to feel their child would benefit from additional religious instruction (particularly those who are Catholic). With cost representing a key barrier for low-income families, Catholic schools will likely need to spend more time informing and educating these parents about available tuition assistance programs before observing an increase in enrollment among this group.

Future Research Questions

The results of the national research provide a strong foundation upon which dioceses, networks, and individual schools can assess and strengthen their current position vis-à-vis a competitive landscape. The following questions, however, can help guide further research at a national, regional, and/or local level.

What is required to drive enrollment on a diocesan, network, or individual school level?

No two dioceses, networks, or schools are alike. As such, additional research is needed, at a minimum, to understand which combination of messages and tactics will be most effective in influencing parents' choice of school at a local level.

What is the most effective way to influence Hispanic communities across the United States?

Hispanic communities in the United States are very much defined by distinct family heritage and national origin. We also expect that generational differences heavily influence perspectives and expectations for K-12 education among Hispanics. Given this, we believe additional research is required to understand how to market to, and influence, different Hispanic communities (e.g., those living in Florida versus those in the Southwest; those in the first generation in the U.S. vs. those in subsequent generations in the U.S.)

What are the opportunities for growing Catholic schools among families who

are living in specific types of locations (e.g., inner city or rural areas)?

Again, since the national research was not structured to allow for in-depth analysis on a location-specific level, additional research is required to isolate the dynamics at play in specific geographic areas.

Is there an opportunity to drive enrollment among other ethnically diverse groups (aside from Hispanics)?

For some educators and administrators, it may prove critical to better understand the opportunity that exists among ethnically diverse groups, particularly in areas with a high density of different populations of people. First, a recent study conducted by the Pew Research Center shows that black millennials (those between the ages of 22 and 37) *are considerably more religious than others in their generation*¹¹. Furthermore, the following findings from this survey (based on analysis of black adults, not parents specifically) suggests that the black population could represent a key target for Catholic schools:

- Among black adults surveyed in this report (N=98), 51% say their religious faith is extremely important in shaping their daily lives (as compared to whites (28%) and Hispanics (27%)).
- Black adults are more likely than white adults to believe Catholic schools are affordable (33% vs. 15%, respectively).
- Black adults are more likely than their white and Hispanic peers to strongly disagree with the following statements:
- Catholic schools are rigid in their moral teachings and do not encourage students to express their own opinions. (33% of black adults strongly disagree vs. 12% of white adults and 5% of Hispanic adults).
- Catholic schools lack diversity, both in terms of student population and its teachings. (28% of black adults strongly disagree vs. 12% of white adults, and 20% of Hispanic adults).

¹¹Pew Research Center. (2014). Center 2014 Religious Landscape Study. Washington, D.C.: Pew Research Center.

Research Implications and Next Steps

The ability to strengthen the position and increase enrollment of Catholic schools will require a localized approach. As a result, the following should be considered on a diocesan and school level moving forward:

Research Implications

1. There is an immediate opportunity for Catholic schools to strengthen their position within an increasingly competitive educational landscape nationwide.

2. Catholic schools need to refine the messaging mix to ensure they effectively reach, engage, and persuade target parent groups.

3. Demystify tuition costs.

4. Catholic schools may also need to adjust their product offering to ensure it meets parents' requirements.

Next Steps for Consideration

Catholic schools need to develop an integrated marketing communications strategy at the diocesan and/or school level to build awareness of individual schools and their product offering while correcting misperceptions.

The goal of the strategy should deliver a consistent messaging platform across a range of channels (e.g., print publications, emails, website, and social media). The campaign should also consider using both traditional (public relations, advertising) and digital (blog posts, banner ads) tools to reinforce the school's messaging in a coordinated fashion.

Catholic schools need to develop a message platform that focuses on the specific areas that will effectively influence consideration of Catholic schools.

Messages and visuals need to strike the right balance conveying Catholic schools' commitment to academic excellence and Catholic identity.

At a minimum, in the short term, Catholic schools should evaluate current school websites to ensure the information and visuals featured on the site convey a good balance between academic offerings (including STEM curriculum) and religious instruction. Enlisting a third-party audit or assessment could be useful.

Messages need to be nuanced or adjusted when targeting specific parent groups. When targeting Hispanic families, communications should be offered in both English and Spanish.

Catholic schools should consider a second communications effort specifically focused on increasing parents' confidence in their ability to afford tuition at a Catholic school. The objective of these communications is two-fold: (1) increase awareness of specific tuition assistance programs and (2) educate parents on how to access and apply for tuition subsidies.

In choice states, Catholic schools should consider partnering with state and local agencies to help promote the availability of tax credits, vouchers, and/or other tuition assistance offerings. Catholic schools should consider providing a point of contact on a local level – someone who parents can seek out with questions and/or assistance with the application process.

Catholic schools need to clearly differentiate themselves from public schools in a way that also meets (or exceeds) parents' requirements for their child's K-12 education.

A focus on STEM is seen as a requirement for K-12 schools today, not just Catholic schools. This means that to maintain a competitive edge, schools need to offer and promote these courses and programs to parents. Schools that have accredited STEM programs should promote this fact. (Note: While extracurricular activities are not a requirement for most parents nationally, parents do place a premium on the arts. To this end, schools should consider expanding its STEM program to include the arts, via a STEAM or STREAM curriculum).

Parents value diverse environments as they are seen as critical to their child's long-term success in a global marketplace. At a bare minimum, Catholic schools need to ensure students and their families feel welcomed when they visit a school regardless of their religion, ethnicity, or socioeconomic status. This may require educating front-office staff on specific "customer" service techniques and the important role they play in representing the school.

To the extent possible, schools should promote their diverse student populations and studies, with a focus on the different ethnicities, religions, and varied learning needs of the students enrolled, as well as the programs and projects they complete with up-to-date technology.

Research Implications

5. Leverage and promote the school's strengths.

Next Steps for Consideration

Catholic schools are seen as having a proven track record for developing “good citizens”—something that parents see as lacking at public schools and other school types. Catholic schools should position their faith-based approach to educating children as a central component to strong character development. Images and stories about the impact the school (students and educators) has had on its local community will go far in elevating the status of a school in the mind of a parent. ST(R)EAM programs provide an excellent means through which students can demonstrate not only impact on the local community, but the global community by solving real world problems through the lens of Catholic social teaching.

Featuring parent, alumni, and community member testimonials on system/diocese and school websites can be powerful tools for illustrating the impact of a school within a local community.

Catholic schools should also profile and promote educators and their individual accomplishments to increase awareness that these individuals are qualified, talented, and invested in the success of each one of their students.

6. Parents are doing their due diligence when choosing a school for their children. Meet them where they are.

Parents rely heavily on school websites to gather information and familiarize themselves with a school. Useful information is key: the findings in this research can guide what data is important to include—such as student performance data, curriculum, etc. Catholic schools need to ensure their websites are up-to-date and are easy to navigate and understand.

Parents place great stock in information they receive from other parents about schools they may be considering. To this end, Catholic schools should identify and utilize parent advocates—parents who currently have children enrolled in their schools who are highly satisfied and active in the community. These parents can be instrumental in increasing awareness of a school and its offerings in the community and online (e.g., parent groups on Facebook).

Catholic schools should also partner with priests and parishes to promote Catholic schools at a parish level. In addition to asking priests to announce school events during Mass, find ways to include information about Catholic schools in parish newsletters, bulletins, and other communication efforts. Schools should also find ways to participate during parish-sponsored events (e.g., craft fairs, holiday events, etc.).

Of course, even within the same system or diocese, the needs and answers to these questions are likely to vary considerably. As a result, when considering the suggestions above, it will be important to take into consideration the specific needs, priorities, and resources of individual schools.

A note about Hispanics: Hispanic parents, particularly those who are Catholic, appear to have higher expectations for Catholic schools. In addition to requiring a strong academic curriculum, they want schools that embrace their Latino heritage and culture. It is less important that students at the school they choose have a predominantly Hispanic population; rather, it is more important that administrators and educators be bilingual. Additional research is needed among Hispanic families to better understand how to drive enrollment among this audience given the diverse cultural makeup of Hispanic families in the different regions of this country.

Appendices

Appendix A: Additional Methodology Details

Key Quantitative Subgroups:

| KEY SUBGROUPS | SAMPLE SIZE (<i>unweighted total</i>) |
|---|---|
| All parents | 1,201 |
| All parents of children ages 0–6 | 382 |
| All parents of children ages 7–12 | 331 |
| All parents of children ages 13–17 | 345 |
| Hispanic Catholic parents | 220 |
| White Catholic parents | 297 |
| Non-Catholic parents | 510 |
| Catholic parents | 548 |
| All parents low income (< \$50,000/annually) | 412 |
| All parents mid/high income (\$50,000+ annually) | 624 |
| Catholic parents low income (< \$50,000/annually) | 173 |
| Catholic parents mid/high income (\$50,000+ annually) | 362 |
| Non-Catholic parents low income (< \$50,000/annually) | 239 |
| Non-Catholic parents mid/high income (\$50,000+ annually) | 262 |
| Urban | 455 |
| Suburban | 645 |
| Rural | 300 |
| Northeast | 320 |
| Midwest | 270 |
| South | 190 |
| West | 291 |
| Millennials | 749 |
| Gen X | 370 |
| Baby Boomers | 255 |

Focus Groups by Geography

| TARGET AUDIENCE | Philadelphia, PA | Miami, FL | Indianapolis, IN | Los Angeles, CA | Chicago, IL ¹² |
|---|------------------|-----------|------------------|-----------------|---------------------------|
| Parents with children ages 6 and younger | 1 group | 1 group | 1 group | 1 group | 1 group |
| Parents with children ages 7 and older | 1 group | 1 group | 1 group | 1 group | 1 group |
| Hispanic parents with children ages 3 to 16 | 1 group | 1 group | | 1 group | 1 group |

Satisfaction by Income

| % Satisfaction with child's current school | All Parents | Low Income | Mid/high income |
|--|-------------|------------|-----------------|
| % "Extremely" satisfied | 33% | 25% | 37% |
| % "Very" satisfied | 33% | 34% | 33% |
| Total Satisfied (% saying "extremely" or "very" satisfied) | 66% | 59% | 70% |

Appendix B: Local Considerations

Addressing all these conclusions will not happen overnight – what can schools plan for in the next few weeks, months, years? The following is a tool for school leaders and teams to use to unpack and apply to their local situation.

1. Internal audit to identify core strengths and weaknesses

Given that the quality and demographic makeup of Catholic schools vary considerably – even in a given diocese or region – individual schools should begin by conducting an internal audit of their core assets to determine the most efficient growth strategy moving forward. Important questions to answer include:

a. Current family satisfaction study – How satisfied are your current parents and students? Do you have a current survey protocol in place to monitor shifts in attitudes and behaviors? What changes should be considered, if any? Are you leveraging satisfied parents to spread the word about your school in the local community?

b. Value proposition – Does your school have a clearly defined value proposition that resonates with current and prospective parents? If so, are your staff and faculty familiar with the value proposition and clearly articulate it? Is this being adequately conveyed in your marketing materials and website?

c. Academics – How are your school's academics viewed? Do you offer a current and competitive curriculum? Does your curriculum include a strong STEM (or STREAM) program? If not, why not?

d. Marketing communications – Are you proactively communicating the value your school offers? How effective are your communications in reaching, engaging, and persuading prospective families to consider your school? Are you utilizing social media and other digital communications?

e. Message mix – Are you communicating what matters most to parents? Are your messages balanced to reflect both the focus on academics and religious instruction?

f. Website – Does your website adequately reflect what your school offers? Does it strike the right balance between religious and non-religious offerings? Does it convey a learning environment that is diverse, utilizes modern/cutting-edge technology?

g. Social media – Do you have a presence on social media? Are you leveraging social media parent groups in your local community?

h. Front office or administrators – Is your team easy for parents to reach and with whom they can work? What type of impressions are they making? Are they communicating the right message to prospective parents about your school?

i. Influencers – Who are the influencers (e.g., parents, community/business leaders, etc.) in your community and how do you activate them to assist your school in spreading its message?

j. Financial aid – What tuition assistance programs are available to your students and their families? To what extent are they being communicated? Are they easy to understand or navigate?

Based on the results of this audit, it is likely school teams will identify simple changes that can be made that will have a major impact on increasing enrollment in the short-term. Implementing small, less expensive changes first achieve short term gains while you explore those changes that may require more significant investments or time to implement.

2. External exploration to understand your greatest opportunities

The ability to develop and execute an effective communications strategy hinges on a clear understanding of a given audience's needs and expectations. To do this, research of some sort is typically required. At a minimum, schools should be conducting annual satisfaction studies with current parents and students to ensure the school and its teachers are meeting expectations. These surveys should yield metrics that matter and that can be acted upon for continuous quality improvement (such as questions about their child's growth and on the school's curriculum). Schools could engage a professional in this process. In short, surveys should not be taken lightly; they can provide useful insights into what changes or adjustments school teams may want to consider at their school. For the same reason, exit interviews should also be considered among families who choose to leave the school (or who do not continue to another Catholic school at some point in their children's education).

Research with parents in the larger community or target geographic area is typically required to determine how to attract new families to your school. This research can provide answers to the following questions:

a. Who should you be targeting? Which parent groups are most likely to consider your school? Who are least likely and why?

b. What are you known for, both in terms of strengths and weaknesses?

c. How can you effectively attract new families and students to your school? Which messages do the best job driving interest and consideration in your school? What are the greatest barriers to consideration for your school?

The results of these different research efforts can be used to directly inform the development and content of a communications campaign that effectively drives enrollment.

Appendix C: Stories from the Field

This section contains stories of dioceses and schools that have thoughtfully reflected on national or diocesan research to devise unique solutions to challenges raised in this research. They address these issues with a variety of solutions, from marketing and rebranding, academic improvement, new outreach to Hispanic/Latino families, to strategic use of scholarships. The following examples bring to life how to apply the research to local experiences and inspire creative solutions that strengthen and expand Catholic education.

It's Our Product, Not Our Messages

Archdiocese of Philadelphia

The Archdiocese of Philadelphia conducted research among several different audiences to gain a fuller understanding of what parents desire in an education for their children. For the past three years, they have conducted a continuous quality improvement survey distributed to parents of children currently enrolled in their Catholic schools. In 2017, the Archdiocese worked with EY-Parthenon to conduct research of parents who expressed interest in Catholic schools but decided against enrolling their children.

The Archdiocese discovered that parents did not think as highly of Catholic schools as they had anticipated and that parents were more concerned with the school's academic quality and opportunity than with its Catholicity. Since conducting this research, the deputy secretary of marketing and enrollment has met with presidents, principals and advancement directors throughout the diocese to discuss enrollment strategies based on the research covered in this report and their own knowledge gained through the Parthenon research and continuous quality improvement surveys.

The Archdiocese realized that their product needed adjusting, not just their messages. They are now analyzing results, drilling down to see where their

strengths lie, and identifying areas for improving the quality of their education in order to appeal to prospective parents, current parents, and even teachers, especially through their websites.

Rapid Enrollment Growth through Comprehensive Strategy and Deep Investments

Diocese of Grand Rapids

The Diocese of Grand Rapids has achieved three consecutive years of enrollment growth from 2015-2018 despite projected enrollment decline. Through new initiatives that address many parents' concerns about enrolling their students in Catholic schools, the diocese increased enrollment by 255 students, or 4% increase.

The Diocese achieved enrollment growth by implementing a comprehensive strategy with significant investments in several areas:

- Improving affordability through increased scholarship
- Growing professional capacity by adding admissions enrollment professionals, a marketing communications professional, and an elementary school athletic director
- Developing a plan for future vitality

Some of the Diocese's specific interventions include:

- A new Welcome Scholarship program for incoming students
- An increase of the need-based Bishop's Scholarship Fund
- Expansion of Hispanic outreach program and multi-lingual staff
- A new diocesan position to add educational technology expertise to their schools' shared services network
- A comprehensive update to the diocesan curriculum

The Diocese of Grand Rapids has also learned that when certain elements of Catholic education are highlighted to parents, they are significantly more likely to enroll their children. For example, the Diocese has placed more emphasis throughout their communications on academic excellence, such as their 100% high school graduation rate and lifelong benefits of attending a Catholic school.

Beyond Parents' Perceptions: Helping Legislators Understand & Value Catholic Schools

Archdiocese of Newark

The implications of this research resonate beyond marketing to parents. At a spring 2018 meeting, the Archdiocese of Newark's Catholic Schools staff reflected on the national market research and implications for their work. One novel application of the research that came from this meeting was legislative outreach.

Legislators do not necessarily have much exposure to or experience with Catholic schools and may also hold similar misperceptions to those identified in the study. When building relationships with legislators and their staff or when testifying on behalf of Catholic school students, faculty, and families, a government affairs representative or liaison must be prepared to debunk unstated myths or perceptions about Catholic schools in addition to their scope of testimony. For example, legislators may perceive Catholic schools as teaching old science or creationism, a misperception that may detract from their belief in the academic strength of the Catholic schools. Thus, legislators may dismiss the testimony regardless of its validity.

The Archdiocese of Newark welcomes this national analysis as a tool for use not only in addressing misperceptions among legislators, but as another means of highlighting the benefit Catholic education brings to New Jersey.

Using ROI to Establish a Stronger Brand and Increase Enrollment

Archdiocese of Milwaukee

This research inspired the Archdiocese of Milwaukee to pursue further information at the local level to learn how parents perceived their Catholic schools. Located within the school choice state of Wisconsin, the Archdiocese was particularly motivated to understand why parents who could afford to enroll their children in a Catholic school did not. What were parents' (mis)perceptions of the type of education their children would receive at a Catholic school?

The Archdiocese's research project, being conducted at the time of this report, is focused predominantly on Catholic high schools. Its goal is to increase enrollment at the high school level by gaining information needed for a marketing and enrollment strategy that demonstrates return on investment and integrates local marketing research. The research project is proceeding in a two-phased approach:

First, alumni surveys of Catholic high school graduates will gather information about transition to college, hoping to find that graduates transition more effectively, prosper more in college, and are more likely to graduate with a bachelor's degree in four years or less. The Archdiocese intends to utilize this information in crafting a brand for Catholic schools that focuses more strongly on its higher return on investment.

Second, the Archdiocese will determine the best way to market these findings to their audience. The Archdiocese will conduct focus groups and online surveys with parents of children in fourth to eighth grade, including Catholic, public, and non-Catholic private schools. The data will shape marketing, enrollment, and recruitment strategies for fall 2019.

“Virtues Curriculum” Speaks the Language of Parents ... Students and Staff Like It, Too

Diocese of Sacramento

As demonstrated in this national research study, a majority of parents desire strong character development in their education. This reaffirms the Diocese of Sacramento and its school leaders, who piloted a character development program at the Presentation of Blessed Virgin Mary elementary school within the Diocese.

The Dominican Sisters of Mary, Mother of the Eucharist, who teach at the school, developed the virtues curriculum, called Disciple of Christ, Education in Virtue. Rooted in Thomistic virtue ethics, the program is both cognitive and habitual, encouraging students and staff to understand the vocabulary necessary to discuss and live out virtues in communion with others. The program intentionally utilizes a vocabulary that parents can relate to without compromising the religious faith of the school.

After several years of implementation, the program is widely popular at the school, changing how students and staff interact with each other and amongst themselves. Its success, combined with the national market research findings, further confirmed to the Diocese’s superintendent that parents desire a virtue curriculum for their children.

With the support of the bishop, the superintendent is now implementing the program at every Catholic school in the Diocese in the 2018-2019 academic year. Staff will be educated on the virtues, and over the next few years students and teachers will have the vocabulary to help students from a young age to avoid negative behavior and to promote virtuous interactions.

A Coordinated Approach to Welcoming (and Recruiting) New Families

The Archdiocese of Omaha

The Archdiocese of Omaha has worked extensively on both enrollment and marketing to new audiences through a number of different initiatives – a dynamic approach that has increased enrollment. Components of the Archdiocese’s multi-faceted efforts included:

- Recreating a brand for Catholic schools
- Rolling out the “Catholic Schools Awaken Greatness” campaign to reach new audiences and encourage them to consider sending their children to Catholic school
- Driving audiences to visit www.lovemyschool.com, which highlights Catholic schools’ qualities (high ACT scores, curricula that emphasizes academics as well as responsibility and faith, and financial aid opportunities)
- Encouraging its schools to offer welcome grants – \$1,500 scholarships for any student transferring into their schools – to give families an opportunity to explore Catholic schools without worrying about finances

The program has attracted 220 new students. The branding campaign increased parental involvement in spreading awareness of Catholic schools. Parents were encouraged through the parent-ambassador program to share their appreciation of Catholic schools with families enrolled elsewhere.

Finally, Catholic school enrollment has significantly increased due to Latino outreach. In the past three years, 500 Latino students have enrolled in the Archdiocese’s Catholic schools due in part to the efforts of the Catholic school Latino enrollment coordinator who works closely with the Latino ministry office at the Archdiocese. The Archdiocese is beginning a dual language academy that integrates both Spanish and English equally in the classroom. While similar programs exist in the public schools of Omaha, the Archdiocese is the only one to offer a pre-school program in the state.

Taking the Meaning of “Catholic Identity” for Granted

Archdiocese of Washington

Local market research conducted by the Archdiocese of Washington echoed many of the themes identified in this research. In the academic year 2016-2017, the Archdiocese hired a research firm to conduct market research of parents throughout the District of Columbia and five neighboring counties in Maryland. The research included a series of interviews and focus groups targeting both Catholic and non-Catholic parents with children enrolled in any type of school.

One of the study’s most critical takeaways was parents’ differing notions of Catholic identity and whether or not it was desirable in a school – in short, there was a lot of ambiguity and ambivalence towards the term.

Catholic schools had taken for granted that parents understood what the school’s Catholic identity meant. For example, the national research shows that when parents think of Catholic schools, some of the first things that come to mind are uniforms, strict rules, and religious instruction. However, both the national and local Archdiocese of Washington research also revealed that emphasis on community service was a driving factor for Catholic families in considering a Catholic education for their children.

Community service is an important part of the Archdiocese of Washington’s Catholic identity, so the Archdiocese created a three-year plan to establish and promote a new brand that includes emphasis on community service as an important part of their Catholic mission.

Local Ownership and Accountability for Enrollment

Diocese of Fall River

Like other dioceses highlighted in this section, the Diocese of Fall River has undergone changes to adapt their marketing to meet the needs of parents.

In addition to these changes, the Diocese has also developed a management practice that allows schools to have more ownership and accountability for enrollment and marketing goals.

The Diocese requires that each school’s strategic plan include enrollment and marketing measures. The formation of these goals and measurements are informed by diocesan research on parents’ perceptions and needs. The school principals then have accountability goals they set in the planning process.

Each school’s individual strategic plans are currently being updated as part of a broader effort to develop the Diocese’s marketing and brand identity. In a recent task force report on Catholic education, the Diocese recognized and acted on the value of intentional market and a brand driven by research and parent feedback.

The report spurred a new brand, website, and marketing specialist position. The work is being guided by the factors that drive parents’ decisions for their children’s education: academic rigor, holistic education, financial accessibility, and service.

Public Schools Have Chromebooks?! – The Importance of What We Communicate

Diocese of Little Rock

The principal of Christ the King Catholic School in the Diocese of Little Rock recalls a conversation with one of the school’s alumna who chose to send her child to a public school. The parent cited the public school’s Chromebooks as a driver for the decision. The principal was shocked to hear this – Christ the King also offered Chromebooks!

Upon reevaluating their marketing techniques in light of the national market research, Christ the King discovered that they were not highlighting this and other qualities in its advertising. Qualities such as strong academics, extracurricular activities, and a safe learning environment were not emphasized as

benefits. The national research suggests that these elements are important to parents, but that parents do not associate them with Catholic schools.

In spring 2018, Christ the King distributed flyers in the church bulletin advertising its new technology, STEM programs, art classes, safety trainings and measures, and graduates' success in high school. A number of parishioners and parents shared that they had previously been unaware of these programs and were impressed by the current offerings.

This market research initially confounded Christ the King. Parent perceptions revealed in the findings did not reflect the school's perception of itself. The school's marketing, which focused on being a highly religious school, did not reflect its additional assets. The market research has moved Christ the King to promote the school's strong academics and new technology alongside its great Catholic identity.

Digging in at the Diocesan Level

Diocese of Paterson

For many schools in the Diocese of Paterson, significant drops in enrollment have caused an unsustainable financial burden. Further, New Jersey has neither vouchers nor tax credits to help support the schools' viability. The Diocese wanted to have a better understanding of its competitive landscape and – inspired by the national market research – wanted to understand key drivers of enrollment, which vary across its three counties.

The Diocese conducted a local survey of more than 600 parents of children aged two to 12 living in one of the Diocese's three target counties. While the results echoed themes that emerged in the national research, there were variations and some differences on the local level.

Similar to the national research, the diocesan level research found that parents do not closely associate assets they desire for their children (such as schools'

diversity, inclusive learning environments, and STEM program) with Catholic schools. The research found that the public school system in the three counties is strong and seen as offering a quality education and at no cost.

Varying from the national research, the Diocese's research revealed that Catholic schools are viewed very favorably within the Diocese of Paterson's footprint, with few strong negative or crippling misperceptions. This is attributed to an above-average population of active Catholics.

The Diocese has concluded an effective way to drive enrollment is to highlight the desirable strengths of their schools in marketing and promotion. To gain further insight, a series of focus groups was conducted to test messages for each of the key drivers to develop the most effective and persuasive messages to drive enrollment. The Diocese also commissioned a survey to inform strategies for retention.

The research and analyses will guide the strategy and creativity for a diocesan-wide marketing campaign to increase enrollment, awareness, and the value of Catholic education.

Closing the Awareness Gap between Internal and External Perceptions

Archdiocese of Seattle

The Archdiocese of Seattle recently commissioned consumer research that found parents who send their children to Catholic schools are highly satisfied and do not believe they would be nearly as satisfied with non-Catholic alternatives. At least 90% believe their child's Catholic school provides a safe and nurturing environment, places high expectations on behavior and performance, uses rigor in their language classes, creates strong communities, and maintains a holistic focus on the student.

Catholic families who do not send their children to Catholic schools have a significantly different

perception. Only 25% indicated that they had looked into their local parish school as an option for their children. In comparison with public school alternatives, parents saw little difference in the quality of education between Catholic schools and public schools.

Of the Catholic families who do not have a child in Catholic schools, 43% were unaware of available financial aid offerings and 46% indicated that they could reasonably afford the tuition. Low levels of awareness prompted the Archdiocese to choose four schools with historical enrollment challenges (but also evidence of strengths) to participate in a hyper-local marketing campaign to target parents that were likely to be interested in Catholic education.

At the end of the pilot, the schools reported enrollment gains of at least 80 new students – with 75% of the families committing to pay the full stated tuition – illustrating the enrollment impact of closing the awareness gap in perception.

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