

The coronavirus papers 1.4

Jewish community income: How is it being affected by the pandemic?

January 2021

The coronavirus papers comprise a series of reports based on a national survey of Jews across the UK conducted by JPR in July 2020, during the COVID-19 outbreak. The studies look at the effects of the virus on Jewish people's health, jobs, finances, relationships and Jewish lives, and aim to provide Jewish organisations with the data they need to navigate their way through the pandemic, and to help revitalise Jewish life.

1 / Introduction

The economic impact of the COVID-19 pandemic has potentially far-reaching implications for the Jewish community that extend well beyond the burden to Jewish individuals and their families. Jewish organisations are concerned that their incomes could be severely impacted by any economic downturn caused by the pandemic. In the following analysis, we examine whether or not such concerns are warranted, based on data collected by JPR in July 2020 in the United Kingdom. The analysis focuses on three types of communal income stream: Jewish charitable giving, synagogue membership fees and the voluntary contribution parents pay to Jewish schools for their child(ren)'s Jewish education.

2 / Charitable giving

To assess the impact of the pandemic on Jewish charitable giving, it is helpful to examine giving in 'normal times' to provide context.¹ We asked all survey respondents whether or not they had donated money to any charities (Jewish and/or general) in 2019, the year before the pandemic, and found that almost all (86%) said they had done so.

We also asked respondents whether they had already donated, or were planning to donate, to any type of charity in 2020, to detect any indication of change. The survey showed that a similar proportion, 83%, had either already done so by the time the survey was conducted in July, or expected to do so later in 2020.² So overall, we only see a slight decrease in the total proportion expecting to donate money to charity (falling from 86% in 2019 to 83% in 2020).

¹ Graham, D. and Boyd, J. (2016). [Charitable giving among Britain's Jews: Looking to the future](#). London: Institute for Jewish Policy Research.

² N=6,984 individuals.

However, while this gives us an overall picture, it does not fully capture the nature of the change that may be taking place. In Table 1 we see that most respondents (79%) who donated in 2019 still planned to do so in 2020, and a further 11% who did *not* donate in 2019 similarly planned *not* to do so in 2020. Thus, only the remaining 10% of respondents expected to *change* their donation behaviour between 2019 and 2020. Some of these people (3%) are ‘gained’ donors – that is they switched from not donating in 2019 to donating in 2020 – but 7% may be ‘lost’ donors who donated in 2019 but said they did not expect to do so in 2020. It is this latter group – those who gave in 2019 but were no longer expecting to do so in 2020 – that will be examined in detail below. However, a key point to note is that the *net* change in donors is just four percentage points to the negative, from 7% to 3%.

Table 1. Change in charitable giving behaviour between 2019 to 2020 to Jewish and general charities (N=6984)

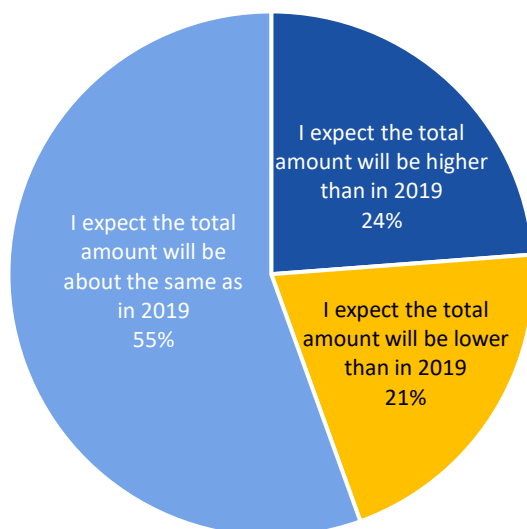
		Made/plan to make donations in 2020?		Total
		Yes	No	
Made donations in 2019?	Yes	79%	7%	86%
	No	3%	11%	14%
Total		83%	17%	100%

Question: Thinking back to 2019, did you personally make any donations to Jewish and/or non-Jewish charities? [Yes; No]

Question: And during 2020, have you personally made, or do you expect to make, any donations to Jewish and/or non-Jewish charities? [Yes; No]

Assuming most people will continue to give to charity, might the *amount* they donate decline as a result of the pandemic? Setting aside those who said they did not plan to donate at all in 2020, we find that slightly more respondents (24%) said that they planned to give a greater amount in 2020 than in 2019, compared to 21% who said they planned to give a smaller amount (Figure 1). In other words, the proportions planning to increase or decrease their donations are very similar.

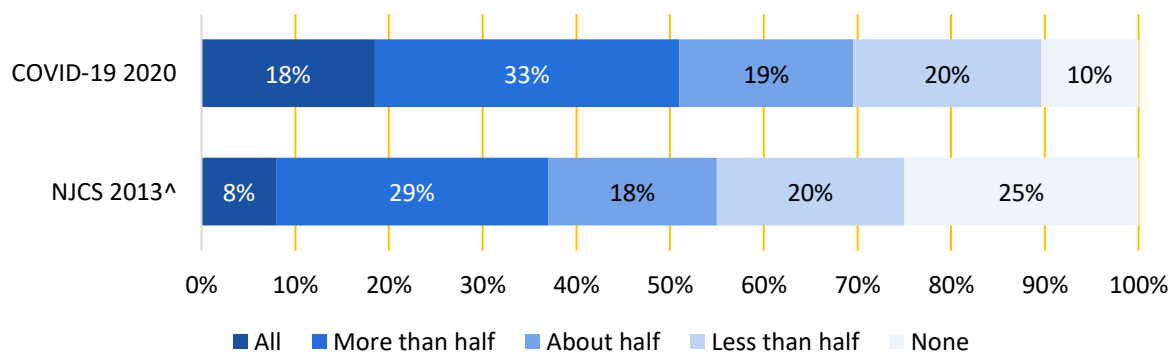
Figure 1. Expected change in total amount donated to charity in 2020 compared with 2019 (N=6,061 individuals)



Question: Do you expect the total amount you will personally give to charity during 2020 will be higher, lower or about the same level as you donated in 2019? [I expect the total amount will be higher than in 2019; I expect the total amount will be lower than in 2019; I expect the total amount will be about the same as in 2019]

The above analysis relates to total donations to both Jewish and general charities, but we also asked respondents to tell us about the *proportion* of their total donations they planned to give to Jewish charities. Among those who said they planned to donate in 2020, a majority (70%) said they would allocate half or more of their donations to Jewish organisations (Figure 2). A similar question was asked in 2013 in the JPR National Jewish Community Survey (NJCS) and the equivalent proportion then was just 55%, i.e. far lower. Since the samples and questions are somewhat different, the two figures may not be directly comparable, but it is distinctly possible that there has been a shift in Jewish giving habits in favour of Jewish charities. Whether this reflects a longer-term trend or has been influenced by the pandemic cannot be determined at this stage.

Figure 2. Proportion of total donation in 2020 respondents plan to give to Jewish charities (2020 N=6190; 2013 N=3175)*



* Excluding non-donors.

[^] Graham, D., Staetsky, L.D. and Boyd, J. (2014). *Jews in the United Kingdom in 2013: Preliminary findings from the National Jewish Community Survey*. London: Institute for Jewish Policy Research, p.29.

Question (COVID-19): Considering the total amount you personally expect to give to charity in 2020, approximately what proportion are you likely to give to Jewish charities? [All; More than half; About half; Less than half; None]

Question (NJCS) And approximately what proportion of these charitable donations you gave over the past 12 months went to Jewish charities? If you are unsure, please estimate. [All; More than half; About half; Less than half; None]

By combining the results for anticipated changes in donation behaviour for both the amount given and the preference for Jewish charities, we can establish the extent to which we might have expected to see a change in overall giving behaviour between 2019 and 2020 (as of July 2020). Of all those who donated to charity (Jewish and/or general) in 2019, just over half (52%) did not expect to make any changes in their donation behaviour regarding either the amount or the proportion given to Jewish charities (Table 2 – grey shading, central box). Further, the proportion that planned to *increase* both the amount and the proportion is matched by the proportion that planned to *decrease* both of these (7% in each case – grey shading, diagonals). In other words, roughly speaking, we see no net change in overall intended donation behaviour regarding Jewish charities in two out of three (66%) respondents.

Of the remaining 33% of donors in 2019, a slightly higher percentage (17% - two orange shaded boxes) planned to maintain or increase (either the amount or the proportion) than the percentage that planned to maintain or decrease either of these (13% - blue shaded boxes) (Table 2). The small remainder (in the pink shaded boxes) effectively balances each other out. What this all means is that, as of July 2020, the picture appears to be one of stasis: most Jews were not planning to change their donation behaviour in these regards between 2019 and 2020. Of those who were, the intended change slightly favours Jewish charities. Note that the analysis did not quantify the amounts involved

and cannot show what ultimately happened in 2020 (this will require other data sources). Rather, it provides an indication that, overall, expected donor behaviour regarding Jewish charities five months into the pandemic did not appear to have markedly changed when compared with pre-pandemic behaviour.

Table 2. Charitable donations behaviour: amount and proportion donated to Jewish charities: 2019 compared with 2020 (N=6190)

		Expected change in total amount donated: 2019 compared with 2020			Total
		Smaller amount	Same amount	Greater amount	
Expected change in proportion donated to Jewish charities in 2020	Smaller proportion	7%	1%	2%	10%
	Same proportion	12%	52%	15%	79%
	Greater proportion	2%	2%	7%	11%
Total		21%	55%	24%	100%

Key: Grey shade = no change; Orange shade = increase to Jewish charities; Green shade = decrease to Jewish charities; Other change = yellow shade

Question: Do you expect the total amount you will personally give to charity during 2020 will be higher, lower or about the same level as you donated in 2019? will personally give to charity during 2020 will be higher, lower or about the same level as you donated in 2019? [I expect the total amount will be higher than in 2019; I expect the total amount will be lower than in 2019; I expect the total amount will be about the same as in 2019]

Question: And would you say the proportion you are likely to give to Jewish charities in 2020 will be higher, lower or about the same as the proportion you gave to Jewish charities in 2019? [It will be a higher proportion than in 2019; It will be a lower proportion than in 2019; It will be about the same proportion as in 2019]

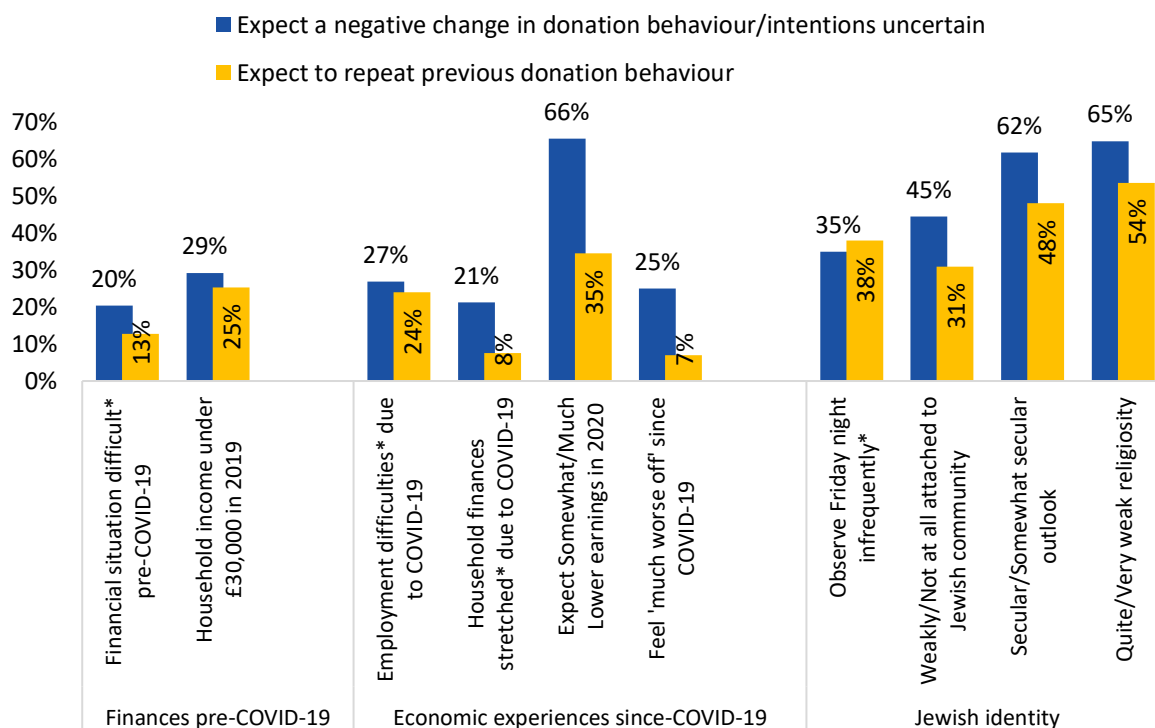
It was shown in Table 1 that 7% of respondents expected to change their charitable giving behaviour (to Jewish and/or non-Jewish charities) in a *negative* way, that is, they expected to switch from having given in 2019 to not giving in 2020. To better understand the impact of the pandemic on those expecting to make this negative switch, we will compare them with all those who did not expect to make such a change (which includes those who did not donate in 2019 and did not expect to do so in 2020). The analysis focuses on key economic and Jewish identity traits known from previous research to impact giving behaviour.³ In particular, we are interested in understanding the relative importance of the following three predictors of behaviour: first, the economic circumstances of people prior to the pandemic; second, the economic impact of the pandemic on factors such as people’s employment and household finances; and third, the role that the strength or weakness of people’s Jewish identity may also play.

Comparing the two groups in terms of their financial situation *prior* to the pandemic, we see that in both aspects measured, those expecting a negative switch in their donation behaviour were more likely to be experiencing challenging financial circumstances, in particular, reporting that they were already finding things difficult* financially at that time (20% versus 13% respectively) (Figure 3). Comparing the two groups in terms of their economic experiences *after* the pandemic started, we see once again that the negative switch group has been hit much harder, especially on three of the four measures. Finally, in terms of Jewish identity, we see that on three of our four measures, those

³ See further Graham and Boyd 2016. op. cit.

expecting a negative switch in their donation behaviour exhibit weaker levels of Jewish belief and belonging. However, on one item—observance of Friday night rituals—they exhibit a slightly stronger level,⁴ although the difference is small (35% versus 38%).

Figure 3. Comparison between those expecting a negative change in their giving behaviour with all others: change between 2019 and 2020 by selected economic and Jewish identity measures (N=6984 individuals per variable)[^]



* Financial situation difficult = combined response for: Just about getting by, Finding it quite difficult, Finding it very difficult; Household finances stretched = at least one of: Had to borrow money or use credit, Had to use food banks, Struggling to pay bills (for example, food and energy), Had to reduce the size of meals because there was not enough money to buy food, Had to ask the Jewish community for financial assistance; Employment difficulties = I have had my work hours reduced, I have had my pay reduced, I have lost my job (redundancy), I am currently or I have been furloughed; Observe Friday night infrequently = combined response Occasionally, Rarely, Never.

[^] Full question wording and response options can be found in the Appendix.

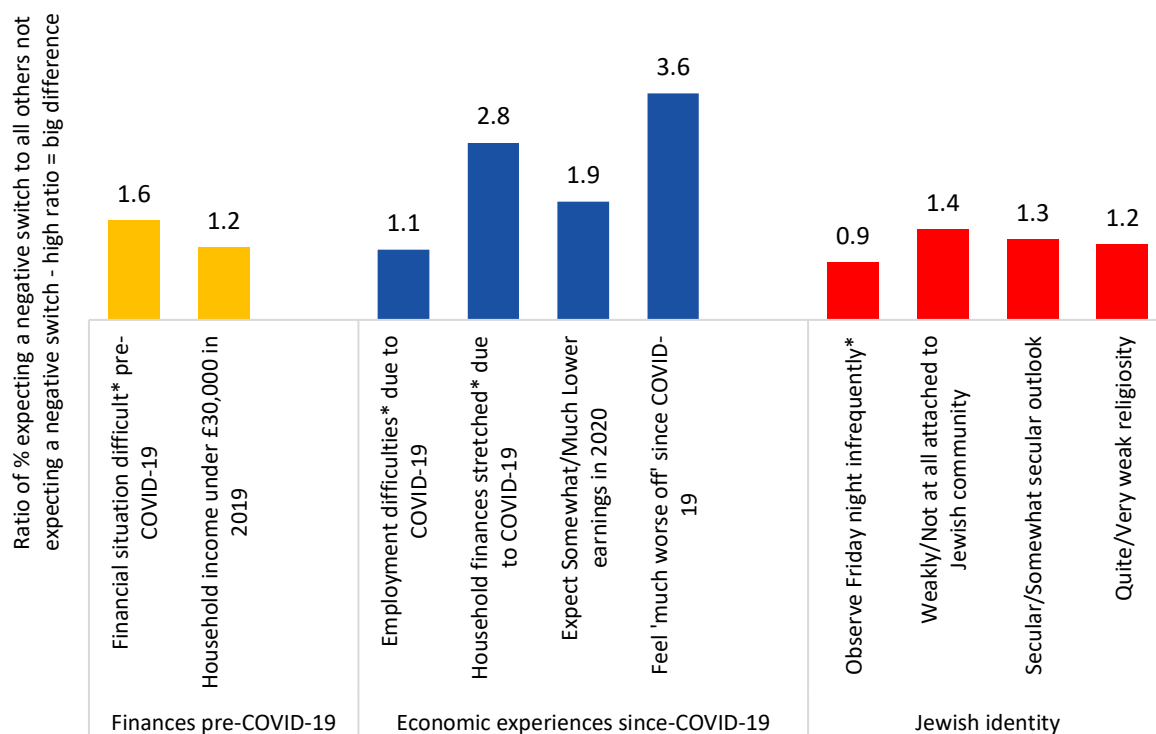
To help summarise the findings in Figure 3 and compare the relative size of the impact of each variable examined in a consistent way, we can calculate the difference between the two groups as a ratio. For example, we saw that 20% of those expecting a negative switch in their charitable donation behaviour were experiencing challenging financial circumstances even prior to the pandemic, compared with 13% of all others. This ratio is 1.6 (i.e. 20%/13%) (Figure 4, first column). In other words, the negative switch group was 60% more likely to be experiencing financial difficulties *before* the pandemic started compared with all others who donated in 2019.

By calculating a ratio in this way for all the variables measured, we can see the relative impact of each variable (Figure 4). The biggest differences are seen in the group of measures examining changing

⁴ Since we are measuring a 'negative' religious behaviour – infrequent observance of Friday night rituals – the double negative may be confusing. To simplify, we would say the group that is expecting a negative change in its donation behaviour is more likely to observe Friday night rituals frequently than all others.

economic circumstances since the pandemic began (blue columns). The ratio 3.6 tells us that those expecting a negative switch in their donation behaviour are almost four times as likely to say they are feeling ‘much worse off’ financially than all others. Similarly, they are almost three times as likely (ratio 2.8) to report experiencing stretched household finances since the pandemic began. Overall, it is apparent that of all the variables we tested, the economic impact of the pandemic is the strongest predictor of respondents expecting to make a negative switch in their donation behaviour, especially regarding household finances and feeling financially worse off.

Figure 4. Comparison between those expecting a negative change in their giving behaviour with all others expressed as ratios by selected economic and Jewish identity measures (N=6984 individuals per variable)*



* See notes to Figure 3.

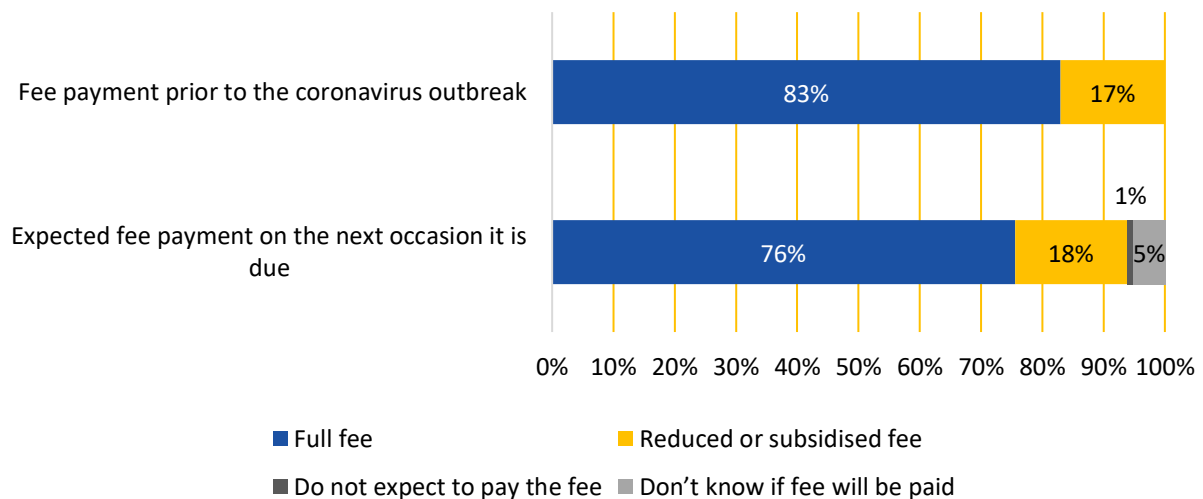
In summary, compared with all others who donated in 2019, those who said they were expecting to make a negative switch in their charitable donation behaviour between 2019 and 2020 were more likely to say the pandemic has had negative economic impact on their finances—the key driver of their behaviour. In particular, their household finances are far more likely to be stretched and they are far more likely to feel much worse off financially. Their pre-pandemic economic situation and their Jewish identity were less important but not unimportant drivers.

3 / Synagogue membership fees

Whilst charitable giving is one of the key ways in which Jewish communal life is funded, the synagogue sector is heavily supported by membership fees. Understanding any changes in willingness or ability to pay these fees is important in that context, and it is possible that this source of community income may be impacted by the consequences of the pandemic. In this section, we explore this issue. Since synagogue membership is generally held on behalf of a household rather than an individual, this analysis is based on household units.

Overall, 49% of households reported paying synagogue membership fees at the time of the survey.⁵ Of these fee-paying households, most (83%) were paying full fees and 17% were paying fees at a reduced or subsidised level (Figure 5). To help understand whether or not the coronavirus pandemic may impact fee payment, all householders who paid synagogue membership fees (full or reduced level) were asked a follow up question about whether they expected to pay their membership fee 'on the next occasion it was due'. The proportion expecting to pay the full fee declined from 83% to 76%, and the proportion expecting to pay subsidised fees increased very slightly from 17% to 18% (Figure 5). 1% said they did not expect to pay their synagogue membership fee at all,⁶ and 5% said they were unsure whether they would pay it.

Figure 5. Comparison of synagogue membership fee payment behaviour prior to the pandemic and expected payment behaviour on 'the next occasion it is due' (N=3,182 households)[§]



§ Only current fee payers were asked about their expectations

^ Householders who were aged under 40 and never married and living with their parent(s), and not living with a partner are excluded.

Question: Prior to the coronavirus outbreak, were you paying synagogue membership fees? [Yes, the full fee; Yes, at a reduced or subsidised rate; No]

Question: Looking ahead, and taking into account any changes to your financial circumstances due to the coronavirus outbreak starting in March 2020, do you expect you will pay your synagogue membership fee the next occasion it is due? [Yes, I expect to pay the full fee; Yes, I expect to pay a reduced or subsidised fee; No; Don't know]

As before, our main interest is in detecting any change in behaviour, particularly where it is to the detriment of the synagogue. In particular, how many people expected to change their behaviour negatively by switching from paying a full fee to a reduced fee, or from a reduced fee to no fee? Examined in this way, we find that three quarters (75%) of synagogue membership fee-paying households were full fee-payers who expected to continue to be full fee-payers, and a further 14% were reduced fee-payers who expected to continue to be reduced fee-payers (Table 3). If we add to this the 1% who were paying reduced fees and who expected to become full fee-payers, we see that 90% of current synagogue membership fee-payers expected to maintain the same broad fee-paying arrangement as they had prior to the pandemic (light blue shading in Table 3). The remaining 10%

⁵ Note this is not the same measure as the proportion of households who are synagogue members (56%). There are many reasons why the two figures might differ. For example, some parents choose to pay membership fees on behalf of their adult children.

⁶ Note the survey did not ask those who did not pay a fee prior to the pandemic whether they expected to pay a fee in the immediate future. We cannot assume this number is nil.

(orange shading) is comprised of those expecting to make a negative switch in their fee payment behaviour or who were expressing uncertainty: 4% expected to switch from paying a full fee to a reduced fee, 1% expected to switch from paying a full or a reduced fee to paying no fee at all, and 5% were not sure what they expected to do.

Table 3. Synagogue membership fee payment behaviour prior to the pandemic compared with expected behaviour, July 2020 (N=3,182 households)[§]

		Expected payment behaviour since the pandemic				Total
		Expect to pay the full fee	Expect to pay a reduced/subsidised fee	Expect to pay no fee	Don't know	
Payment behaviour prior to the pandemic	Full fee	75%	4%	1%	4%	83%
	Reduced or subsidised rate	1%	14%	-	1%	17%
Total		76%	18%	1%	5%	100%

§ Only current fee-payers were asked about their expectations

^ Householders who were aged under 40 and never married and living with their parent(s), and not living with a partner are excluded.

Question: Prior to the coronavirus outbreak, were you paying synagogue membership fees? [Yes, the full fee; Yes, at a reduced or subsidised rate; No]

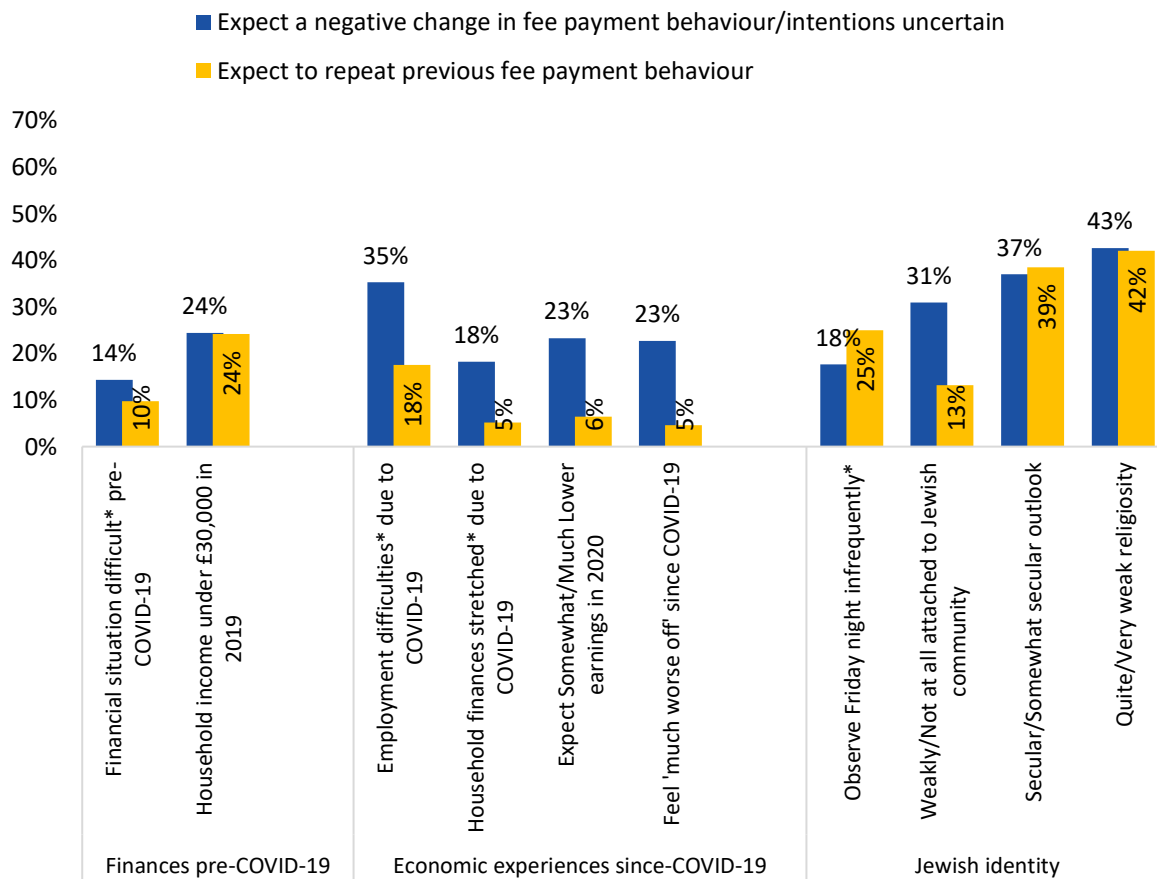
Question: Looking ahead, and taking into account any changes to your financial circumstances due to the coronavirus outbreak starting in March 2020, do you expect you will pay your synagogue membership fee the next occasion it is due? [Yes, I expect to pay the full fee; Yes, I expect to pay a reduced or subsidised fee; No; Don't know]

As with the previous analysis of expected charitable giving behaviour, to better understand the impact of the pandemic on synagogue membership fee payments we will focus on this 10% of households who are either expecting to make a negative switch in their future fee payment behaviour or who express uncertainty about what they will do, and compare them with all other synagogue membership fee-payers (blue shade in Table 3).⁷

First, we observe relatively little difference between the two groups in terms of the households' financial situation prior to the pandemic (Figure 6). While those expecting to make a negative switch or expressing uncertainty were slightly more likely to have been in a difficult financial situation going into the pandemic, the overall proportion and difference between them and the others is small. However, when comparing the two groups in terms of their economic experiences *since* the onset of pandemic, we see a more striking difference, as we did with charitable giving. As might be expected, on all four measures, the negative switch group is far more likely to say they have experienced challenging economic circumstances due to the pandemic. For example, 23% said they felt much worse off financially since COVID-19, compared with just 5% of all other fee-paying households. In terms of Jewish identity, we see a rather mixed pattern. On two measures (secular/religious outlook and strength of religiosity) there is virtually no difference between the two groups, yet, as might be expected in this case, the negative group exhibits far weaker levels of communal attachment than the other fee-payers. On the other hand, they are more likely to observe Friday night rituals than all the others, although the difference is relatively small.

⁷ This assessment excludes households who were not currently paying fees but who expected to do so in the near future. In other words, 10% is a gross, not a net value.

Figure 6. Comparison between those expecting a negative change in their synagogue membership fee payment behaviour and the behaviour of all others; for all those currently paying and their expectations 'on the next occasion payment is due' by selected economic and Jewish identity measures (N=3,182 households)^



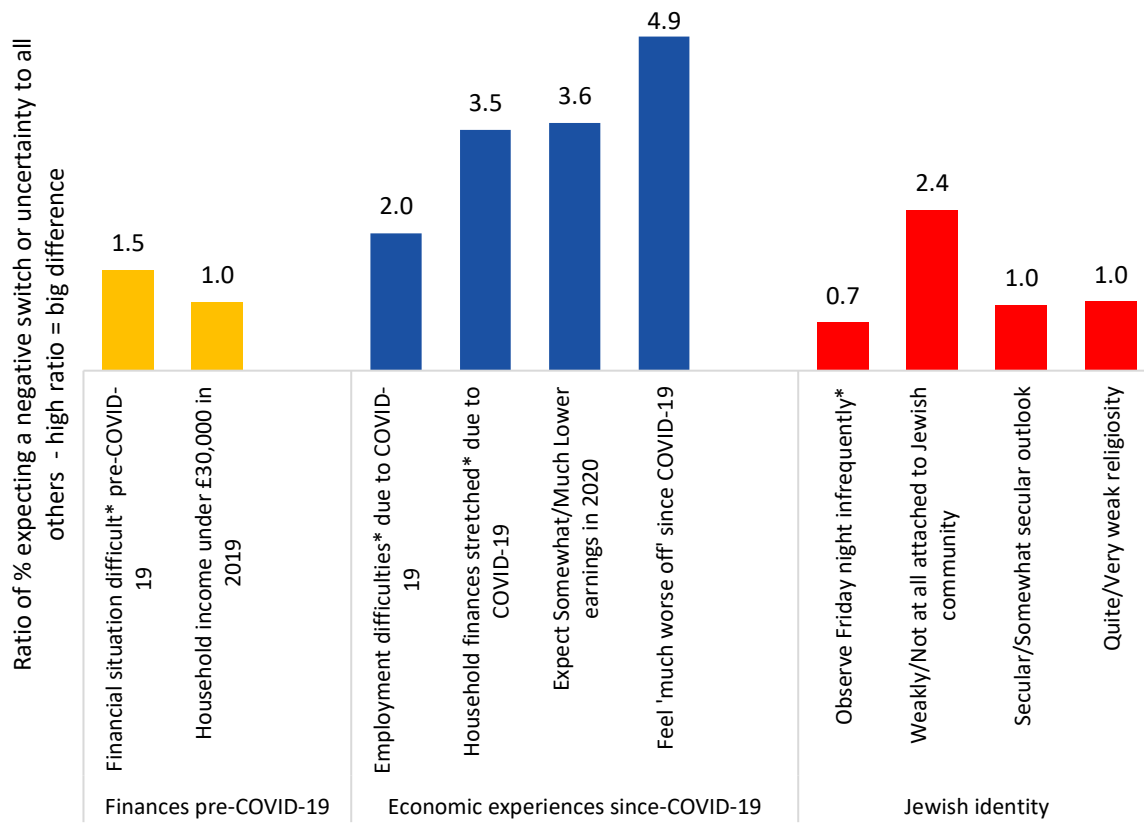
* Financial situation difficult = combined response for: Just about getting by, Finding it quite difficult, Finding it very difficult; Household finances stretched = at least one of: Had to borrow money or use credit, Had to use food banks, Struggling to pay bills (for example, food and energy), Had to reduce the size of meals because there was not enough money to buy food, Had to ask the Jewish community for financial assistance; Employment difficulties = I have had my work hours reduced, I have had my pay reduced, I have lost my job (redundancy), I am currently or I have been furloughed; Observe Friday night infrequently = combined response Occasionally, Rarely, Never.

^ Full question wording and response options can be found in the Appendix.

Again, it is helpful to summarise these findings by means of ratios (see explanatory text accompanying Figure 3). In doing so we see that, as with charitable giving, the largest differences between the group expecting to make a negative change⁸ in their synagogue membership fee payment behaviour and all other fee-payers relates to the impact of the pandemic on their economic circumstances (blue columns) (Figure 7). These households were almost five times (ratio 4.9) as likely as all others to say the pandemic had made them feel much worse off financially. They were also 2.4 times as likely to feel weakly attached their local Jewish community.

⁸ That is, those households who said they expect to reduce their synagogue membership fee or not pay their fee or else who are uncertain about paying their fee.

Figure 7. Comparison between those expecting a negative change in their synagogue membership fee payment behaviour with all others, expressed as ratios by selected economic and Jewish identity measures (N=3,807 households per variable)*



* See notes to Figure 6.

To summarise, changed economic circumstances due to the pandemic is the main driver behind people being more negative or uncertain about paying synagogue fees. At the same time, it is notable that compared to all other synagogue membership fee payers, those being more negative or uncertain also feel more weakly attached to their local Jewish community. Other aspects of Jewish identity are of minimal importance and financial circumstances prior to the pandemic are also relatively inconsequential.

4 / Voluntary contributions to schools

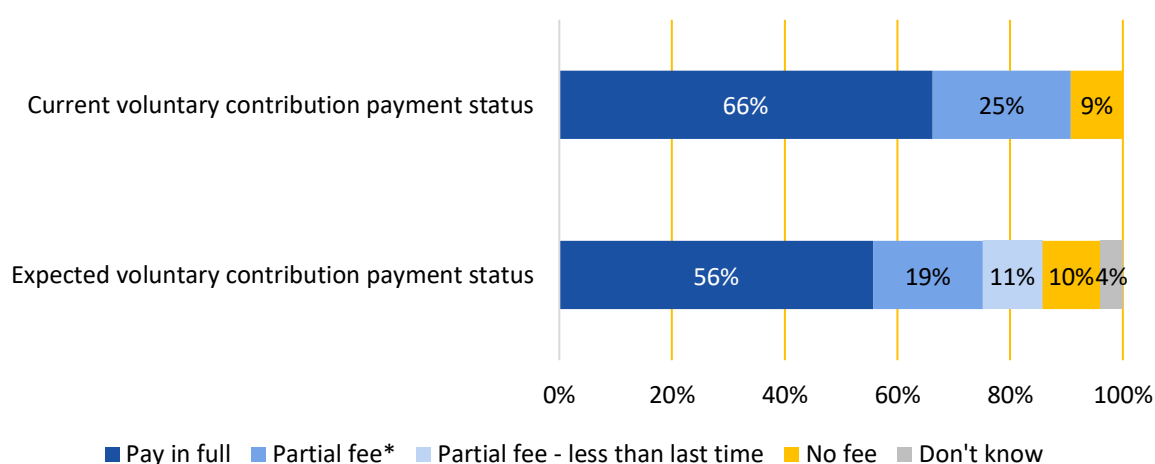
The final aspect of Jewish communal income we explore is the ‘voluntary contribution’ asked of parents of children attending voluntary-aided Jewish schools in the UK. Whilst these schools receive core funding from the state, they ask parents to pay a voluntary contribution, particularly to cover additional costs for Jewish Studies programmes and activities, as well as other Jewish school-specific expenses such as security.⁹ Early on in the pandemic, concerns were raised that many schools would suffer if parents chose not to continue to pay this voluntary fee, or reduced the amount they would

⁹ This is an optional fee Jewish schools request of parents and is in addition to the statutory provision funded by the government. Funds raised are often also used for other educational enhancements, including general extra-curricular and enrichment activities, providing extra classes and running revision activities for exams.

pay.¹⁰ Not all Jewish schools are voluntary-aided, especially in the strictly Orthodox sector,¹¹ and data in the following section are based on households¹² rather than individuals.¹³

The extent to which parents choose to pay the voluntary contribution, either in full or in part, is not something that has been explored in a national survey before, and further research development is needed to ensure we fully capture the situation. Nevertheless, our findings about the situation prior to the pandemic are instructive in and of themselves. Overall, 59% of Jewish householders who reported having at least one school-aged child at home (primary or secondary level) said that one or more of their children attended a Jewish school.¹⁴ We found that, prior to the pandemic, for the 2019/20 academic year, 66% of these families were paying the voluntary contribution in full, 25% were paying it in part, and 9% were not paying it at all (Figure 8).

Figure 8. Whether parents expect to pay the voluntary contribution for the 2020/21 academic year compared, July 2020 (N=339 households)¹¹



* Combines responses: Yes, partially, but more than last year; Yes, partially, the same as last year.
 Question: Prior to the coronavirus outbreak, were you (and/or someone else) paying the voluntary contribution for your child's/children's Jewish schooling? [I/we pay it in full; I/we pay it partially; Someone outside my household pays it in full; Someone outside my household pays it partially; No].
 Question: Many people's financial circumstances have been affected by the coronavirus outbreak. Do you expect the voluntary contribution for your child/children's Jewish schooling to be paid, either by you and/or someone else, for the 2020/21 academic year? [Yes, in full; Yes, partially, but more than last year; Yes, partially, the same as last year; Yes partially, but less than last year; No; Not applicable (e.g. you will no longer have any children in a Jewish school in 2020/21); Don't know].

Looking at expectations of payment behaviour for the 2020/21 academic year, the proportion saying they would not be paying it at all changes very little, rising by just one percentage point to 10% (Figure 8, shown in orange). Of the remaining 90%, we see an overall shift towards lower payment levels, but little change in families' willingness to pay something. There is a reduction in the proportion saying

¹⁰ Nyman, S and Moss, A. 'Our schools need financial support from parents,' *Jewish Chronicle*, 11 May 2020.

¹¹ The survey did not establish whether the Jewish school(s) in question were voluntary aided and therefore data for 'No fee' may be partially incorrect.

¹² As before, householders who were aged under 40 and never married and living with their parent(s), and not living with a partner are excluded.

¹³ For more information about the Jewish schools sector, see Staetsky L.D. and Boyd, J. *The rise and rise of Jewish schools in the United Kingdom: Numbers, trends and policy issues*. London: Institute for Jewish Policy Research.

¹⁴ Question: Do any of your children currently attend a Jewish school in the UK? [No; Yes, 1 child; Yes, 2 children; Yes, 3 children; Yes, 4 children; Yes, 5 children; Yes, 6 or more children] (N=541 households).

they would pay it in full (from 66% to 56%), as well as a reduction in the proportion expecting to pay it partially (from 25% to 19%). In addition, 11% expected to pay a reduced fee at a lower level than previously, and a further 4% were uncertain about what they would do. In summary, data from July 2020 indicate that the number of families not paying the voluntary contribution is unlikely to rise much, but a sizeable proportion (15%) reports they will choose to pay less or expresses uncertainty about what they will do.

Again, our interest here is in expected behavioural change, particularly where it is to the detriment of Jewish schools. We see the vast majority (82%) of families were either expecting to make the same contribution as in 2019/20 (including 4% who did not pay previously and did not expect to pay in 2020/21 either) or to increase their contribution between academic years (Table 4 – blue shading). However, the remaining 18%[‡] of families said they expected a negative switch in their payment behaviour, with 9% expecting to pay something but less than the previous year, 6% expecting to pay nothing despite having paid something in the previous year, and 4% who, having paid something in the previous year, were uncertain about what they might pay next year (Table 4 – orange shading).

Table 4. Voluntary contribution payment behaviour for families with children in Jewish schools: 2019/20 behaviour compared with expected behaviour for the 2020/21 academic year, July 2020 (N=339 households)^{^‡}

		Expected payment behaviour for 2020/21 academic year					Total
		In full	Partially: more or same as last year	Partially: less than last year	Nothing	Don't know	
Payment behaviour for 2019/20 academic year	Full fee	55%	2%	5%	3%	2%	66%
	Partial fee	1%	17%	3%	3%	2%	25%
	Nothing	-	1%*	3%*	4%	1% [§]	9%
Total		56%	19%	11%	10%	4%	100%

[‡] May not sum to 100% due to rounding.

* Technically these responses are not strictly logical but are included for completeness.

[§] While these families are uncertain about their future behaviour, having not paid in 2019/20, they do not represent a loss to schools due to the pandemic and so are included in the 'all others' group.

[^] The survey did not establish whether the Jewish school(s) in question were voluntary aided and therefore data for 'No fee' may be partially incorrect.

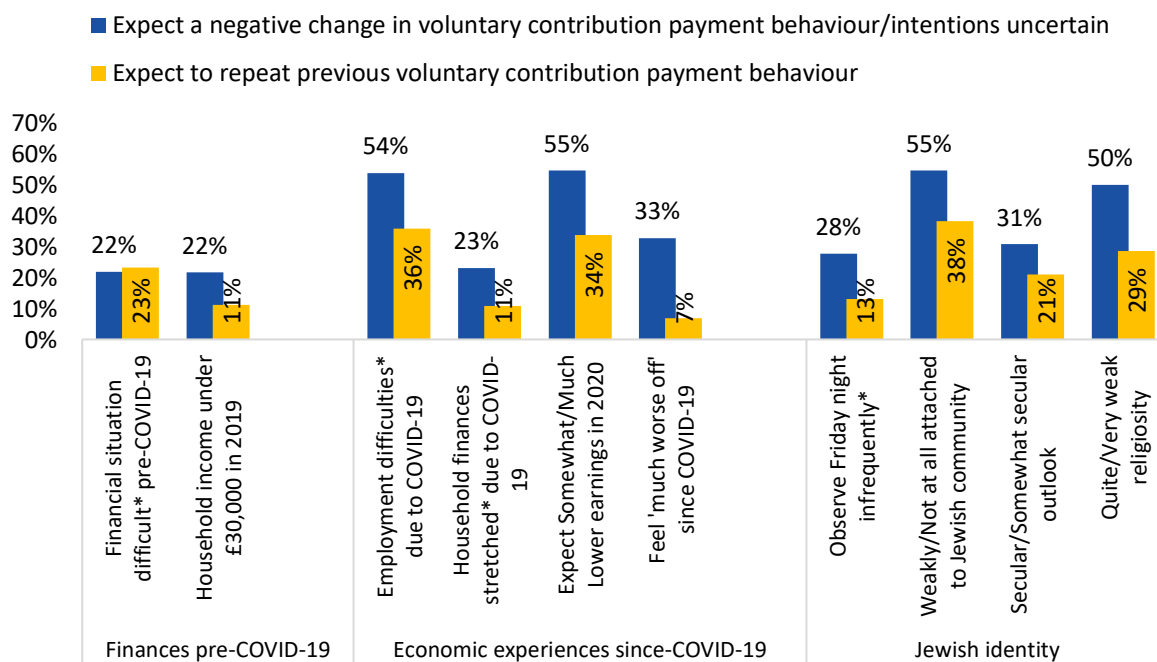
Question: Prior to the coronavirus outbreak, were you (and/or someone else) paying the voluntary contribution for your child's/children's Jewish schooling? [I/we pay it in full; I/we pay it partially; Someone outside my household pays it in full; Someone outside my household pays it partially; No].

Question: Many people's financial circumstances have been affected by the coronavirus outbreak. Do you expect the voluntary contribution for your child/children's Jewish schooling to be paid, either by you and/or someone else, for the 2020/21 academic year? [Yes, in full; Yes, partially, but more than last year; Yes, partially, the same as last year; Yes partially, but less than last year; No; Not applicable (e.g. you will no longer have any children in a Jewish school in 2020/21); Don't know].

To better understand the impact of the pandemic on expected voluntary contribution payment behaviour, we will take the same analytical approach as previously, by comparing these 18% of families who said they expected to make a negative switch with all others. As with the assessment of charitable giving and synagogue membership fee payments, the analysis focuses on families' economic situation prior to and following the onset of the pandemic, as well as a set of Jewish identity traits.

First, we see that those expecting to make a negative change in their voluntary contribution payment behaviour were twice as likely to have had household incomes below £30,000 prior to the pandemic than all other families (22% versus 11% respectively) (Figure 9). Furthermore, as with synagogue membership payments, we see a striking difference between the two groups in terms of their economic experiences since the pandemic. On all four measures, families expecting to make a negative change in their voluntary contribution payment behaviour were far more likely to have experienced a detrimental economic impact from the pandemic than other families. However, in contrast to charitable donations and synagogue membership payments, here we also see important differences in terms of Jewish identity. On all four measures, those expecting to make a negative change in their voluntary contribution payment behaviour exhibit notably weaker levels of Jewish identity.

Figure 9. Proportion of households with at least one child in a Jewish school who expect to either reduce, not pay or are unsure if they will pay the voluntary contribution for the 2020/21 academic year compared with all other parents' payment behaviour by selected economic measures (N=339 households)*^

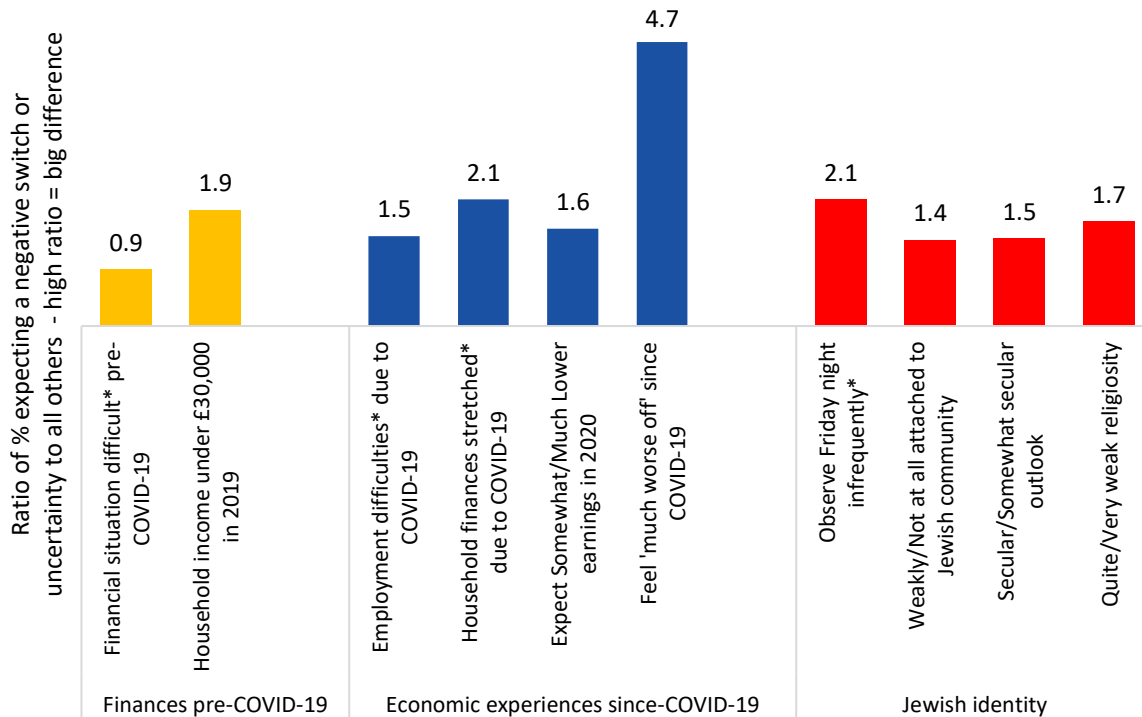


* Financial situation difficult = combined response for: Just about getting by, Finding it quite difficult, Finding it very difficult; Household finances stretched = at least one of: Had to borrow money or use credit, Had to use food banks, Struggling to pay bills (for example, food and energy), Had to reduce the size of meals because there was not enough money to buy food, Had to ask the Jewish community for financial assistance; Employment difficulties = I have had my work hours reduced, I have had my pay reduced, I have lost my job (redundancy), I am currently or I have been furloughed; Observe Friday night infrequently = combined response Occasionally, Rarely, Never.

^ Full question wording and response options can be found in the Appendix.

Summarising these findings using ratios, we see that, unlike with charitable giving and synagogue membership fees, no single set of variables stands out (Figure 10). Yet, on one item, the difference between the two groups is huge. Compared with all other families, those who expected a negative switch (or else were uncertain about making) in their voluntary contribution payment in 2020/21 are almost five times as likely to have felt that their current financial situation was much worse than it had been before the pandemic. On virtually all other variables the difference between the two groups, while notable in several cases, is far smaller.

Figure 10. Comparison between those expecting a negative change in their voluntary contribution payment behaviour with all others expressed as ratios by selected economic and Jewish identity measures (N=339 households)



* See notes to Figure 9.

In summary, we see that most of the variables we have examined potentially impact an expectation of a negative switch in payment behaviour regarding the voluntary contribution. Compared with all others, these families were more likely to have low household incomes prior to the pandemic and their finances are more likely to have been impacted by the pandemic; they are especially likely to feel much worse off financially. Yet they are also more likely to exhibit weaker markers of Jewish identity on all dimensions measured, which is not something we saw regarding charitable giving or synagogue membership payments investigated earlier.

5 / Summary and conclusions

Concern has been expressed by Jewish community leaders in the UK that the COVID-19 pandemic will lead to a reduction in the amount of income available to the Jewish community, which, in turn may affect service delivery. Has this concern been warranted so far? The short answer is that five months into the pandemic, the point at which these data were collected, the overall impact on Britain’s Jewish community income was expected to be modest and manageable in the short to medium-term.

It must be stressed that no attempt has been made to quantify any changes in Jewish communal income. Nor have we examined any shifts in donation behaviour from one Jewish charity to another, or one cause to another, a topic we will look to explore in future research. Rather, we assess the situation, as it was reported to us in July 2020, based on respondent’s *expectations* of future payment behaviour regarding three key aspects of communal income: total charitable donations (including to general charities), the payment of synagogue membership fees, and, for families with children in voluntary-aided Jewish schools, the payment of the voluntary contribution to those schools. We found that, prior to the pandemic:

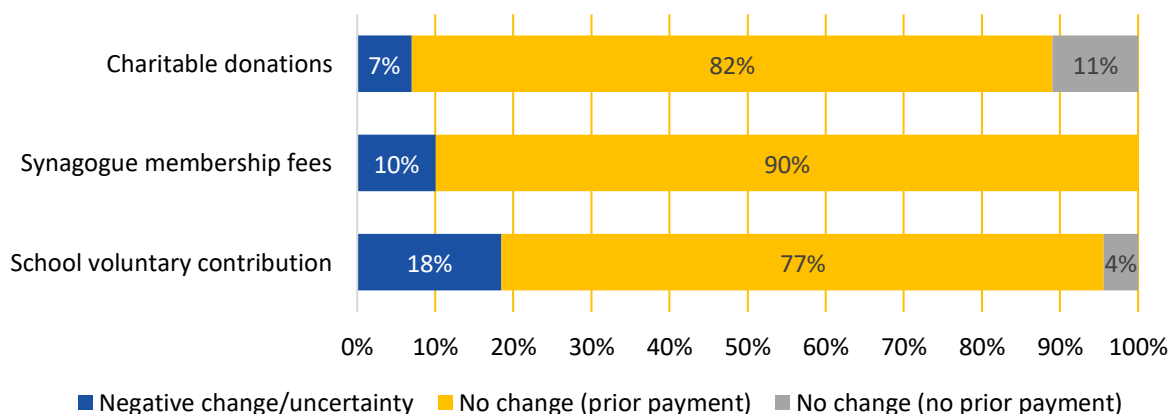
- 86% of respondents had donated money to charity (Jewish and/or non-Jewish) in 2019.
- 56% of Jewish households held synagogue membership, and 49% of Jewish households paid synagogue membership fees.
- 59% of families with at least one school-aged child living at home, sent their child(ren) to a Jewish school(s). For the 2019/20 academic year, 66% of these families paid the voluntary contribution in full, 25% paid it in part, and 9% did not pay it.

The figures relating to the proportion who pay synagogue membership and the voluntary contribution have not been published previously, and we will investigate these issues again in the future. These data, alongside information on charitable giving, provide three baseline figures about income streams into the community which should allow us to observe trends into the future. In the meantime, respondents were asked what they *expected* to do regarding these payments. A summary of the findings is presented in Figure 11 based on each income stream.

- In terms of charitable donations, less than one in ten (7%) respondents who had donated in 2019 expected to either reduce their giving, or not give at all in 2020.
- Similarly, among those who had been paying synagogue membership fees, one in ten (10%) households said they expected to pay less, to stop paying at all, or expressed uncertainty about what they would do on the next occasion fees were due.
- It is on the third income stream, the payment of the voluntary contribution to Jewish schools, where the impact seems to be greatest. 18% of families who were either paying this in full or in part in the 2019/20 academic year, expected to pay less, or not pay at all, or were unsure about what they would do in 2020/21.

However, in all three income streams, those expecting to switch from paying something to paying nothing were very much in the minority. Further, these are gross figures, and it was shown earlier for charitable donations that there were also those who expected to make donations in 2020 but who had not done so in 2019 – i.e. charitable gains. Although not measured in the survey, this may be the case for both other income streams too. So, while Jewish community income does look like it was facing a decline in 2020 at the time these data were collected (July 2020), any such decline appears to be relatively modest and manageable, even at the gross level, at least in the short to medium-term.

Figure 11. The impact of the COVID-19 pandemic on actual or expected future payment behaviour, July 2020*



* Charitable donations N=6,984 individuals; Synagogue membership fees N=3,807 households; School voluntary contribution N=339 households

Prior research shows that the driving factors affecting economic decisions about community donations are people’s general financial circumstances and the strength or weakness of their Jewish identities. In order to understand more precisely the role of the pandemic on the three income streams investigated, we focused on: (a) people’s financial situation before the pandemic; (b) the impact of the pandemic on people’s household finances; and (c) the strength or weakness of people’s Jewish identity. In each case we compared two groups: those expecting to make a negative switch in their payment behaviour, versus all others in that income stream. The results of this have been presented graphically above (Figures 3, 6 and 9), and further summarised by means of ratios between these two groups (Figures 4, 7 and 10). The ratios provide a convenient way to assess the relative impact of each variable on the communal income streams.

Table 5 presents all the ratios for each stream. The larger the ratio, the darker the shading¹⁵ and the larger the relative difference between those anticipating a negative switch in their payment behaviour and all others. The largest ratio is 4.9, showing that those expecting to make a negative switch in their synagogue membership fee payment behaviour were almost five times as likely as other synagogue membership fee payers to say they felt much worse off economically since the onset of the pandemic.

Table 5. Ratios of those expecting to make a negative switch in their payment behaviour to all others, by communal income stream and by selected economic and Jewish identity variables*

		Communal income stream		
		Charitable donations (Jewish and general)	Synagogue membership fees	Voluntary contributions to schools
Finances pre-COVID-19	Difficult financial situation pre-COVID-19	1.6	1.5	0.9
	Household income under £30,000 in 2019	1.2	1.0	1.9
Economic experiences since the onset of COVID-19	Employment difficulties due to COVID-19	1.1	2.0	1.5
	Household finances stretched due to COVID-19	2.8	3.5	2.1
	Expect Somewhat/Much Lower earnings in 2020	1.9	3.6	1.6
	Feel 'much worse off' since COVID-19	3.6	4.9	4.7
Jewish identity	Observe Friday night infrequently	0.9	0.7	2.1
	Weakly/Not at all attached to Jewish community	1.4	2.4	1.4
	Secular/Somewhat secular outlook	1.3	1.0	1.5
	Quite/Very weak religiosity	1.2	1.0	1.7

* For notes see Figure 4 (charitable donations), Figure 7 (synagogue membership fees), and Figure 10 (voluntary contribution).

¹⁵ Ratios of 1.0 and below are unshaded. A ratio of 1.0 indicates the variable does not explain negative payment behaviour. Ratios below 1.0 indicate the direction of any impact on payment behaviour is reversed (see footnote 4)

Comparing all three variables (across the rows in Table 5), it is apparent that the highest density of dark shading relates to 'Economic experiences since the onset of COVID-19.' By contrast, the shading for 'finances pre-COVID-19' and 'Jewish identity' is relatively light. Consequently, we can say that it is the economic impact of the pandemic that mainly explains negative payment behaviour on all three income streams. Yet one sub-variable in particular – *feeling* 'much worse off' financially since the pandemic – stands out, and this suggests that while the economic impact of the pandemic is key, it may well be that subjective *perceptions* of that impact are more important than objective disadvantage when explaining negative payment behaviour. By comparison, the actual financial impact of the pandemic, in terms of stretched household finances and disrupted employment, whilst certainly in evidence, appears to be relatively less important in explaining this behaviour. However, time will tell, and further research scheduled for early 2021 will allow us to revisit this.

Table 5 also allows us to examine which variables affect which particular income streams the most (by looking down the columns). As noted, economic experiences since the onset of COVID-19 exhibit the darkest shading (highest ratios) and this is the case for all three income streams, but it is darkest overall regarding the payment of synagogue membership fees. This suggests that synagogue fees may be more sensitive to the economic impact of the pandemic than the other two streams. By contrast, finances pre-COVID-19 appear to have a far smaller impact, presumably because most of those who could not afford to pay before the pandemic remain unable to do since. However, the situation regarding Jewish identity is different. The weak overall impact of Jewish identity is somewhat surprising, since we might have expected those with weaker Jewish identities to be more likely to cut 'Jewish spending' ahead of other kinds of spending, when compared with more strongly identifying Jews. However, this is not the case, at least not for all income streams. For synagogue membership it is negligible, except for attachment to community, which is to be expected. For charitable donations, we see a broader impact (which is probably understated as this relates to Jewish *and* general charitable donations). Yet the greatest impact that Jewish identity makes can be seen in terms of the voluntary contribution to schools, which suggests that families with weaker Jewish identities were more likely than others to cut their contribution, not pay it at all, or to hesitate about paying it. Presumably, this is related to the fact that the voluntary contribution is a fee mainly earmarked for the provision of Jewish studies, and this may well be less appealing to less observant parents.

What other factors might impact communal income? It is possible that in times of crisis, some people feel they need to dig deeper into their pockets to support others who are less fortunate, so we may even witness an increase in communal income, especially regarding charitable donations. Nevertheless, the economics of British Jews are inextricably linked to the prosperity of the nation, and while it is true that, on average, Jewish people in Britain are economically better off than most others, they are inevitably vulnerable to the same economic winds that affect everyone else. Should mass unemployment develop in Britain, there would undoubtedly be serious ramifications for Jewish communal income. However, as things stand, national policy has focused on avoiding such an outcome, with the introduction of schemes such as furlough. With a vaccine now beginning to be rolled out (as of December 2020), it is hoped that, as we move deeper into 2021, the pandemic will turn a corner along with everything else, including financial security, although many medical and economic uncertainties remain.

To sum up, this study has shown that, as things stood in July 2020, Britain's Jewish community income did *not* look like it was on a precipice. Whilst there were already some signs of negative financial pressure on communal income streams, mainly prompted by the perceived long-term economic consequences of the pandemic, the overall picture suggests modest declines, and even these may be overstated. However, we must also be cautious about these conclusions. July 2020 was just five months into the pandemic and although it was crucial to take the temperature of the community as early as possible, not least to provide baselines for future studies, it remains vital that economic data

about the Jewish community continue to be gathered, not just to assess the current crisis, but as an ongoing project. The pandemic is not the only threat to Jewish community income, and long-term monitoring of key indicators is by far the best way for Jewish leaders and decision makers to better understand the economics of the community and develop policy accordingly. The economic situation has fluctuated throughout the outbreak, and at the time of the survey there was considerable uncertainty about the future. Consequently, respondents were asked to provide their best estimate of what they expected their payment behaviour to be. Nevertheless, establishing what actually happens is now paramount. More data are required and JPR will be spearheading this effort in 2021 with its next COVID-19 survey, which will allow us to measure change more precisely. In addition, with the appropriate permissions, income data direct from community organisations for the calendar year 2020 could soon be available. Having access to such data would make it possible to collate and analyse the figures to build a fuller and more accurate picture of the impact of the pandemic on Jewish community income, thereby providing a further evidence base for serious community discussion.

/ Appendix: notes to Figures 3, 6 and 9

Notes to Figure 3:

Question: Thinking back to 2019, did you personally make any donations to Jewish and/or non-Jewish charities? Yes, No.

Question: And during 2020, have you personally made, or do you expect to make, any donations to Jewish and/or non-Jewish charities? Yes, No.

Question: In January/February 2020, just prior to the coronavirus outbreak, how well were you managing financially? Living comfortably; Doing alright; Just about getting by; Finding it quite difficult; Finding it very difficult.

Question: And how do you feel your current financial situation compares to before the coronavirus outbreak? I'm much worse off; I'm a little worse off; I'm about the same; I'm a little better off; I'm much better off.

Question: Have your household finances been affected by the coronavirus outbreak in any of the following ways? Increase in care costs (for example, childcare and social care); Had to borrow money or use credit; Had to use food banks; Provided financial support to friends and family; Value of savings reduced; Struggling to pay bills (for example, food and energy); Unable to save as usual; Using savings to cover living costs; Pension value is being affected by economic instability; Had to ask the Jewish community for financial assistance; Had to reduce the size of meals because there was not enough money to buy food; None of these.

Question: Which, if any, of the following work-related events has happened to you as a result of the coronavirus outbreak? I have had my work hours reduced; I have had my pay reduced; I have lost my job (redundancy); I am working more hours; I am currently or I have been furloughed; I have had to start working from home full-time; I have had to start working from home part-time; I have had to work around childcare; I have retired from work; I have come out of retirement; I have volunteered my time to support professional activities; Other, please specify; None of these.

Question: Which of the following best represents the annual gross income, from all sources, before tax and other deductions, of your entire household, for the year of 2019? £5,000 or under; £5,001-£10,000; £10,001-£20,000; £20,001-£30,000; £30,001-£50,000; £50,001-£70,000; £70,001-£110,000; £110,001-£150,000; £150,001-£250,000; £250,001+; Don't know; Prefer not to say.

Question: Do you expect your total household income in 2020 will be higher, lower or about the same as it was in 2019? Much higher; Somewhat higher; About the same; Somewhat lower; Much lower; Don't know.

Question: How would you describe your current level of religiosity? Very strong; Quite strong; Quite weak; Very weak.

Question: When it comes to your outlook, how do you regard yourself? Secular; Somewhat secular; Somewhat religious; Religious; Don't know.

Question: How attached (or otherwise) do you currently feel to your local Jewish community? Strongly; attached; Moderately attached; Weakly attached; Not at all attached; There is no local Jewish community where I live.

Question: In January/February 2020, just prior to the coronavirus outbreak, how frequently did you observe Friday night Sabbath (Shabbat) rituals either at home or elsewhere? (For example, by lighting candles or having a special meal). Every week; Most weeks; Occasionally; Rarely; Never.

Notes to Figure 6:

Question: Prior to the coronavirus outbreak, were you paying synagogue membership fees? Yes, the full fee; Yes, at a reduced or subsidised rate; No.

Question: Looking ahead, and taking into account any changes to your financial circumstances due to the coronavirus outbreak starting in March 2020, do you expect you will pay your synagogue membership fee the next occasion it is due? Yes, I expect to pay the full fee; Yes, I expect to pay a reduced or subsidised fee; No; Don't know.

Question: In January/February 2020, just prior to the coronavirus outbreak, how well were you managing financially? Living comfortably; Doing alright; Just about getting by; Finding it quite difficult; Finding it very difficult.

Question: And how do you feel your current financial situation compares to before the coronavirus outbreak? I'm much worse off; I'm a little worse off; I'm about the same; I'm a little better off; I'm much better off;

Question: Have your household finances been affected by the coronavirus outbreak in any of the following ways? Increase in care costs (for example, childcare and social care); Had to borrow money or use credit; Had to use food banks; Provided financial support to friends and family; Value of savings reduced; Struggling to pay bills (for example, food and energy); Unable to save as usual; Using savings to cover living costs; Pension value is being affected by economic instability; Had to ask the Jewish community for financial assistance; Had to reduce the size of meals because there was not enough money to buy food; None of these.

Question: Which, if any, of the following work-related events has happened to you as a result of the coronavirus outbreak? I have had my work hours reduced; I have had my pay reduced; I have lost my job (redundancy); I am working more hours; I am currently or I have been furloughed; I have had to start working from home full-time; I have had to start working from home part-time; I have had to work around childcare; I have retired from work; I have come out of retirement; I have volunteered my time to support professional activities; Other, please specify; None of these.

Question: Which of the following best represents the annual gross income, from all sources, before tax and other deductions, of your entire household, for the year of 2019? £5,000 or under; £5,001-£10,000; £10,001-£20,000; £20,001-£30,000; £30,001-£50,000; £50,001-£70,000; £70,001-£110,000; £110,001-£150,000; £150,001-£250,000; £250,001+; Don't know; Prefer not to say.

Question: Do you expect your total household income in 2020 will be higher, lower or about the same as it was in 2019? Much higher; Somewhat higher; About the same; Somewhat lower; Much lower; Don't know.

Question: How would you describe your current level of religiosity? Very strong; Quite strong; Quite weak; Very weak.

Question: When it comes to your outlook, how do you regard yourself? Secular; Somewhat secular; Somewhat religious; Religious; Don't know.

Question: How attached (or otherwise) do you currently feel to your local Jewish community? Strongly attached; Moderately attached; Weakly attached; Not at all attached; There is no local Jewish community where I live.

Question: In January/February 2020, just prior to the coronavirus outbreak, how frequently did you observe Friday night Sabbath (Shabbat) rituals either at home or elsewhere? (For example, by lighting candles or having a special meal). Every week; Most weeks; Occasionally; Rarely; Never.

Notes to Figure 9:

Question: Prior to the coronavirus outbreak, were you (and/or someone else) paying the voluntary contribution for your child's/children's Jewish schooling? I/we pay it in full; I/we pay it partially; Someone outside my household pays it in full; Someone outside my household pays it partially; No.

Question: Many people's financial circumstances have been affected by the coronavirus outbreak. Do you expect the voluntary contribution for your child/children's Jewish schooling to be paid, either by you and/or someone else, for the 2020/21 academic year? Yes, in full; Yes, partially, but more than last year; Yes, partially, the same as last year; Yes partially, but less than last year; No; Not applicable (e.g. you will no longer have any children in a Jewish school in 2020/21); Don't know.

Question: In January/February 2020, just prior to the coronavirus outbreak, how well were you managing financially? Living comfortably; Doing alright; Just about getting by; Finding it quite difficult; Finding it very difficult.

Question: And how do you feel your current financial situation compares to before the coronavirus outbreak? I'm much worse off; I'm a little worse off; I'm about the same; I'm a little better off; I'm much better off.

Question: Have your household finances been affected by the coronavirus outbreak in any of the following ways? Increase in care costs (for example, childcare and social care); Had to borrow money or use credit; Had

to use food banks; Provided financial support to friends and family; Value of savings reduced; Struggling to pay bills (for example, food and energy); Unable to save as usual; Using savings to cover living costs; Pension value is being affected by economic instability; Had to ask the Jewish community for financial assistance; Had to reduce the size of meals because there was not enough money to buy food; None of these.

Question: Which, if any, of the following work-related events has happened to you as a result of the coronavirus outbreak? I have had my work hours reduced; I have had my pay reduced; I have lost my job (redundancy); I am working more hours; I am currently or I have been furloughed; I have had to start working from home full-time; I have had to start working from home part-time; I have had to work around childcare; I have retired from work; I have come out of retirement; I have volunteered my time to support professional activities; Other, please specify; None of these.

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Question: Do you expect your total household income in 2020 will be higher, lower or about the same as it was in 2019? Much higher; Somewhat higher; About the same; Somewhat lower; Much lower; Don't know;

Question: How would you describe your current level of religiosity? Very strong; Quite strong; Quite weak; Very weak.

Question: When it comes to your outlook, how do you regard yourself? Secular; Somewhat secular; Somewhat religious; Religious; Don't know.

Question: How attached (or otherwise) do you currently feel to your local Jewish community? Strongly attached; Moderately attached; Weakly attached; Not at all attached; There is no local Jewish community where I live.

Question: In January/February 2020, just prior to the coronavirus outbreak, how frequently did you observe Friday night Sabbath (Shabbat) rituals either at home or elsewhere? (For example, by lighting candles or having a special meal). Every week; Most weeks; Occasionally; Rarely; Never.

/ Methodological note

These results are based on an online survey of Jewish people aged 16 and over living in the UK. A total of 6,984 individuals who took part are included in this analysis. They responded variously to emails and e-newsletters sent out by a wide range of Jewish communal organisations and synagogues, or to messaging through social media, word of mouth, or referrals from other survey participants. Five £100 shopping vouchers were offered as an incentive. Since this report focuses on household financial wellbeing, we present findings based on household representatives rather than all individuals. To achieve this, we selected 3,807 household representatives from the 6,984 respondents, representing a random sample of Jewish households across the UK.

The questionnaire was developed by JPR, drawing on a range of existing surveys, including some newly created to respond to COVID-19. It was programmed in-house using Conformat software and formed part of a wider panel recruitment process. Except for a handful of individuals who requested telephone interviews, the survey was completed online, by computer, smartphone or tablet, from 9-31 July 2020, including a short piloting process. The median time taken to complete the survey was 25 minutes.

The survey data were cleaned and weighted to adjust for the age, sex, religious affiliation/denomination and geographical profile of the Jewish community in the UK based on 2011 Census data. Statistical analysis was carried out using IBM SPSS Version 26, and the text in this report focuses wherever possible on findings which are statistically significant. A more detailed methodological report will be available at www.jpr.org.uk.

/ Acknowledgments

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In addition to project funding, there are a number of trusts and foundations that are longstanding core funders of JPR, and without whose unrestricted regular support for our research team overheads none of our projects would be possible. We are particularly indebted to Pears Foundation for its support of JPR's work over many years, to the Rothschild Foundation Hanadiv Europe and the Maurice Wohl Charitable Foundation for their multi-year investments in our programme, and to major core funders, the Lewis Family Charitable Trust, the Charles Wolfson Charitable Trust, the Eranda Rothschild Foundation and the Bloom Foundation.

We also thank the many people across the UK who gave up their time to complete the COVID-19 survey and to support our research. We know their time is precious, so we are particularly grateful to them for sharing their thoughts and experiences.

/ About the Institute for Jewish Policy Research (JPR)

The Institute for Jewish Policy Research (JPR) is a London-based research organisation, consultancy and think-tank. It aims to advance the prospects of Jewish communities in the United Kingdom and across Europe by conducting research and informing policy development in dialogue with those best placed to positively influence Jewish life. Web: www.jpr.org.uk.

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