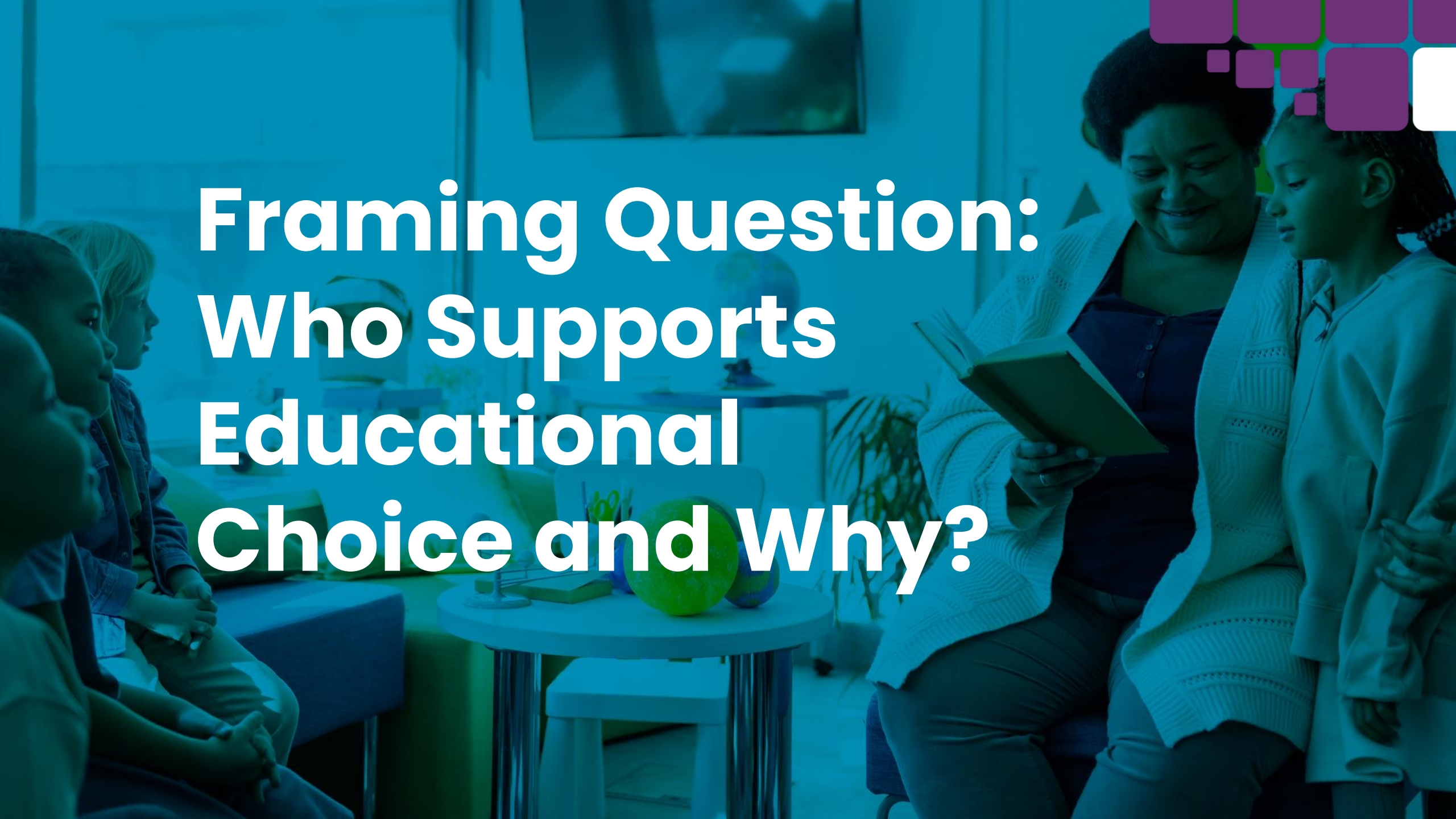




**Educational
Choice – Who
supports and
Who Chooses**

A photograph of a woman with dark hair, wearing a white cardigan over a dark top, sitting and reading a book to a young girl with braided hair. The girl is also wearing a white cardigan. They are in a classroom-like setting with other children visible in the background. The image has a blue tint and a decorative graphic of purple and white squares in the top right corner.

Framing Question: Who Supports Educational Choice and Why?

 MORNING CONSULT®

ed CHOICE

**THE PUBLIC, PARENTS,
AND K-12 EDUCATION**

A National Polling Report

August 2023

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More than 60 percent of parents have a favorable view of homeschooling. Although overall favorability remained the same as July, strong favorability rose sharply in August.

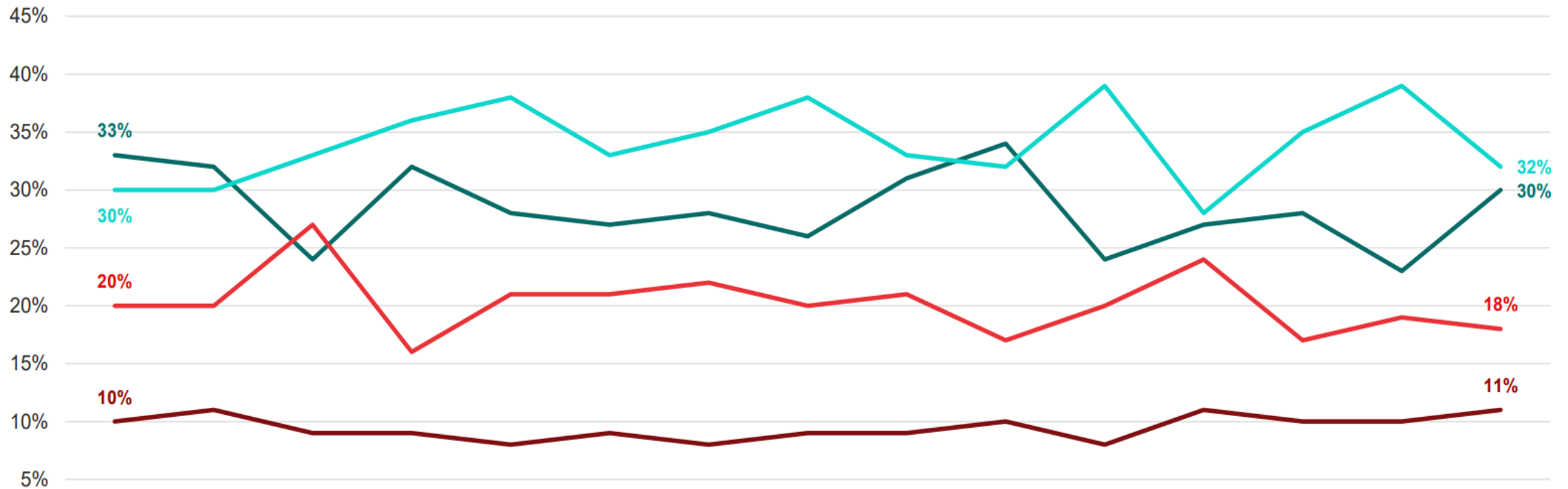
August 2023

In general, what is your opinion of homeschooling?

School Parents

Total Favorable	62%
Total Unfavorable	29%

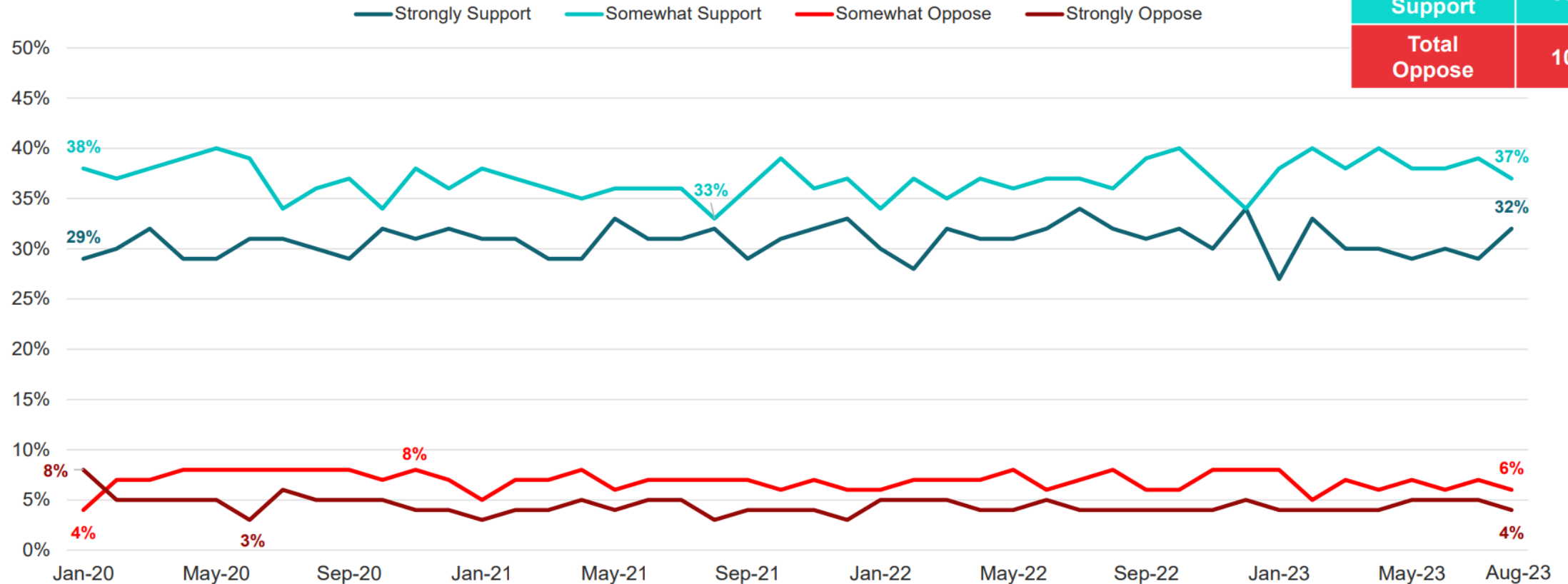
Very favorable Somewhat favorable Not that favorable Not at all favorable



Americans' overall support of ESAs has been fairly stable since March. The public is almost seven times as likely to support ESAs than oppose them.

An "education savings account" in K–12 education – often called an ESA – establishes for parents a government-authorized savings account with restricted, but multiple uses for educational purposes. Parents can then use these funds to pay for: school tuition; tutoring; online education programs; therapies for students with special needs; textbooks or other instructional materials; or save for future college expenses. In general, what is your opinion of an ESA system?

All Adults



August 2023

Total Support	69%
Total Oppose	10%

In August, support for ESAs was highest among school parents, those identifying as liberal, and Millennials. Support was lowest among rural adults, older adults, and Republicans.

An "education savings account" in K-12 education – often called an ESA – establishes for parents a government-authorized savings account with restricted, but multiple uses for educational purposes. Parents can then use these funds to pay for: school tuition; tutoring; online education programs; therapies for students with special needs; textbooks or other instructional materials; or save for future college expenses. In general, what is your opinion of an ESA system?

ESA Support, Among All Adults

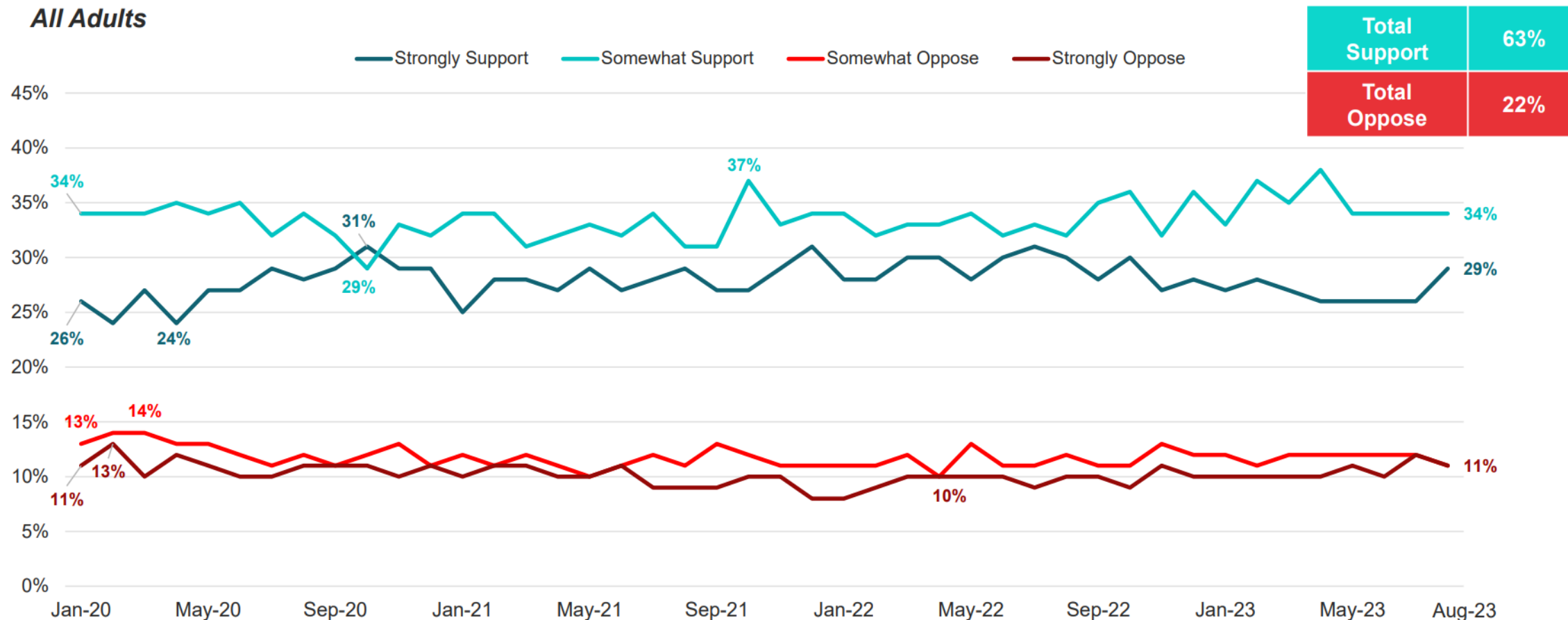
Public Support	69%
----------------	-----

Groups most supportive		Groups least supportive	
School Parents	76%	Midwest	68%
Liberal	76%	Small Town	68%
Millennials	75%	Education < College	67%
Education: Bachelors +	74%	West	67%
Democrat	73%	Low Income <\$35k	67%
High Income \$75k+	73%	Republican	67%
Urban	73%	Baby Boomers	64%

The public's overall support for school vouchers increased slightly in August. Americans are still nearly three times as likely to support school vouchers than oppose.

A school voucher system allows parents the option of sending their child to the school of their choice, whether that school is public or private, including both religious and non-religious schools. If this policy were adopted, tax dollars currently allocated to a school district would be allocated to parents in the form of a 'school voucher' to pay partial or full tuition for the child's school. In general, what is your opinion of school voucher systems?

All Adults



Support for school vouchers was highest among school parents, Republicans, and Millennials. It was lowest among liberals and Baby Boomers.

A school voucher system allows parents the option of sending their child to the school of their choice, whether that school is public or private, including both religious and non-religious schools. If this policy were adopted, tax dollars currently allocated to a school district would be allocated to parents in the form of a 'school voucher' to pay partial or full tuition for the child's school. In general, what is your opinion of school voucher systems?

School Voucher Support, Among All Adults

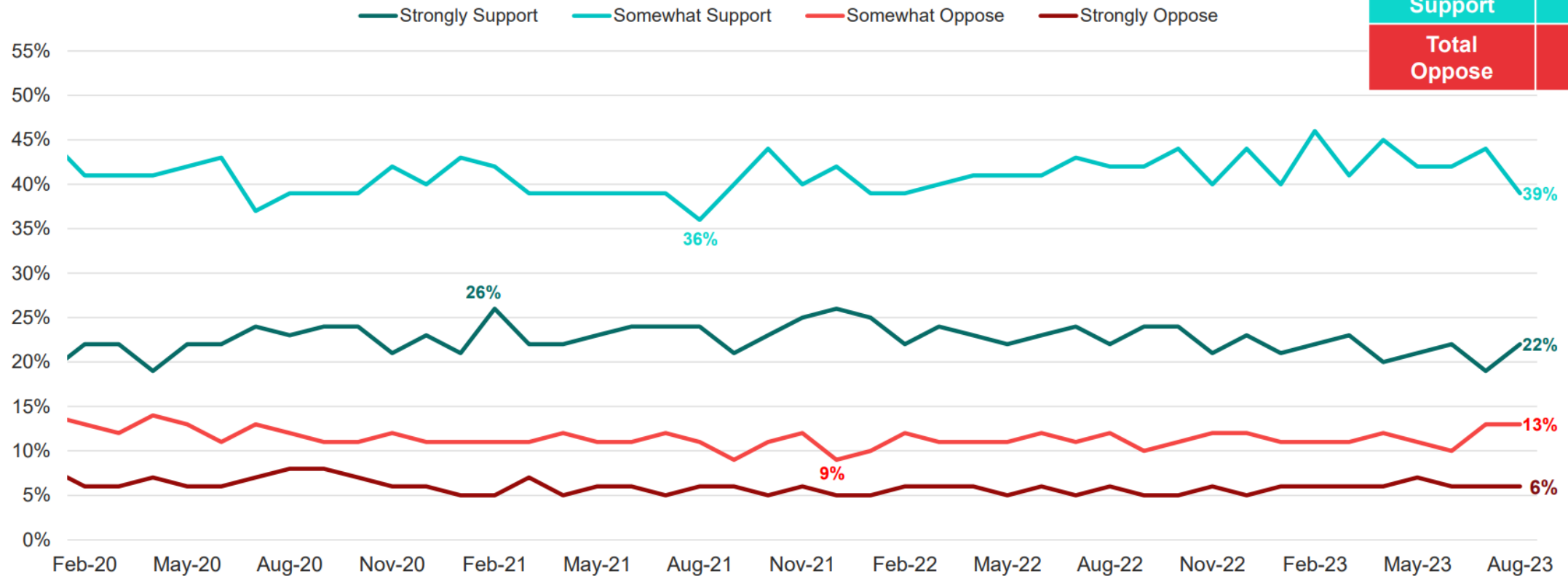
Public Support	Groups most supportive		Groups least supportive	
	Group	Support %	Group	Support %
63%	School Parents	72%	Midwest	61%
	Republicans	70%	Middle Income \$35k to \$75k	60%
	Millennials	70%	Suburban	60%
	Hispanic	69%	Rural	60%
	Black	68%	West	59%
	Urban	68%	Democrat	59%
	Age 35-54	68%	Liberal	59%
	Northeast	66%	Baby Boomers	55%

Americans' overall support for charter schools fell slightly in August. Strong support increased and soft support dropped.

Charter schools are public schools that have more control over their own budget, staff, and curriculum, and are exempt from many existing public school regulations. In general, what is your opinion of public charter schools?

August 2023

All Adults



Support for charter schools is greatest among school parents and conservatives. Liberal adults, rural adults, and those living in the West support charter schools the least.

Charter schools are public schools that have more control over their own budget, staff, and curriculum, and are exempt from many existing public school regulations. In general, what is your opinion of public charter schools?

Charter School Support, Among All Adults

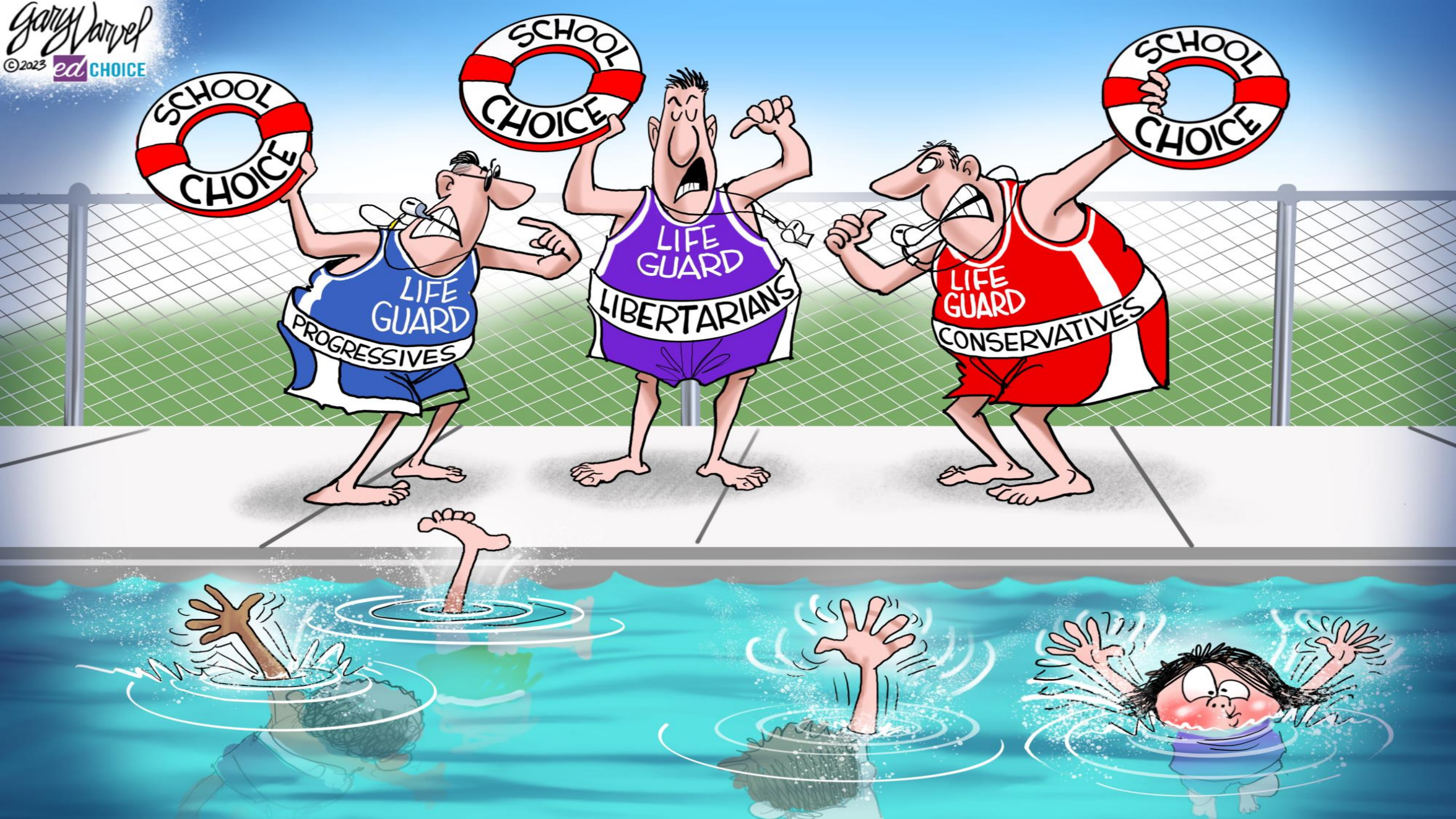
Public Support	Groups most supportive		Groups least supportive	
61%	School Parents	70%	Female	60%
	Conservative	68%	Middle Income \$35k to \$75k	60%
	Republican	66%	Gen Z	59%
	Millennials	66%	Midwest	59%
	South	65%	Baby Boomers	59%
	North	65%	Rural	59%
	High Income \$75k+	65%	Liberal	59%
	Education: Bachelors +	64%	West	57%

A woman with dark hair, wearing a white cardigan over a dark top, is sitting and reading a book to a young girl with dark hair, also wearing a white cardigan. They are in a classroom or library setting. In the background, there are other children sitting at a table, and a small table with a globe and other items. The image has a blue tint and a decorative pattern of purple and white squares in the top right corner.

OK. SO WHAT?

It's one thing to show the support for educational choice and it quite another to ascertain the key demographic drivers of support for educational choice.

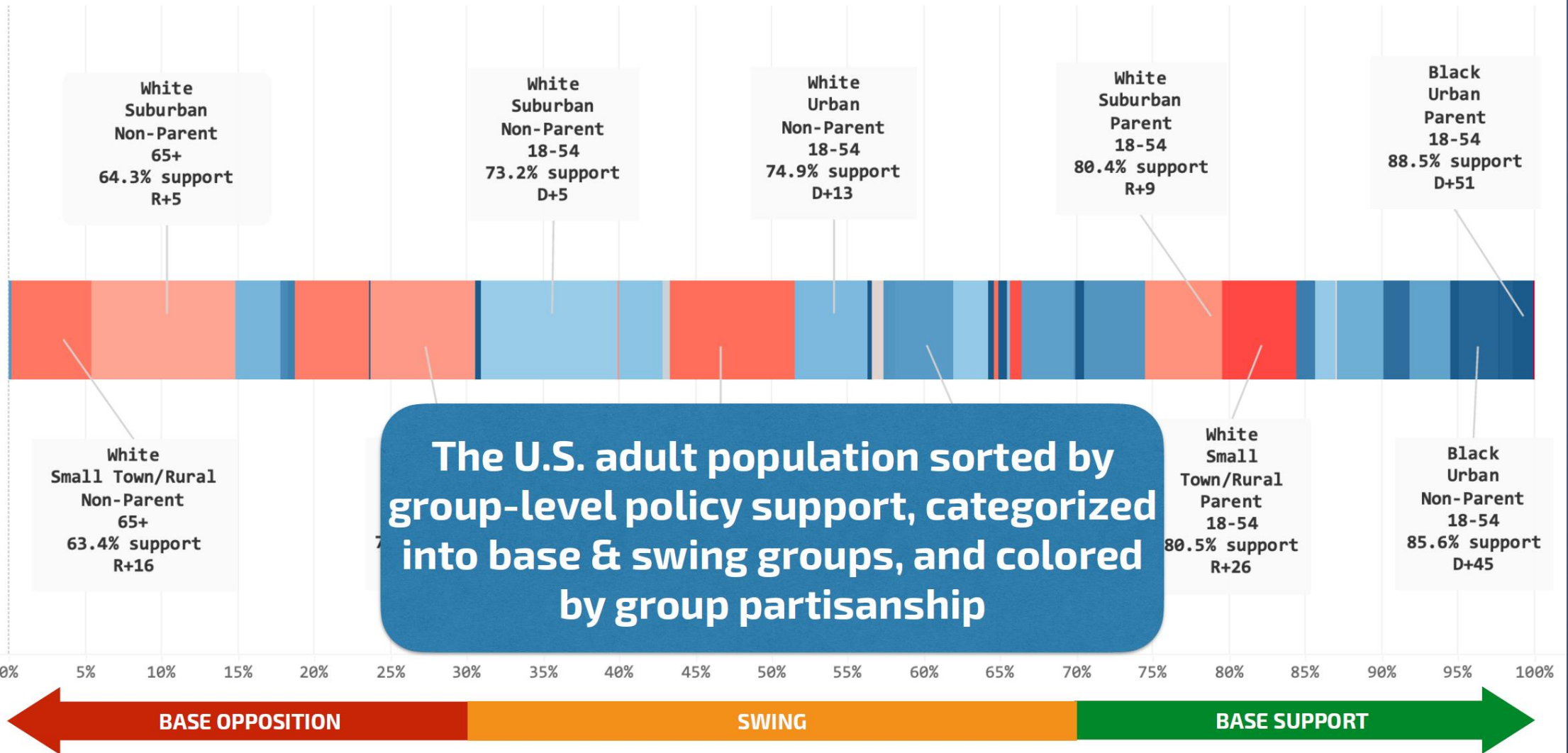
ENTER ECHELON INSIGHTS



What We Did

- Echelon Insights modeled 13,202 combined survey responses from EdChoice monthly tracking surveys from August 2022 to January 2023 to ascertain the key demographic drivers of support for **school vouchers, charter schools, and Educational Savings Accounts (ESAs)**.
- A generalized linear model (GLM) was fit to the survey responses using variables for **party, age, education level, race, urbanicity**, and whether the respondent was **parent with children under 18 inside the home**. These were the only variables with statistical power in predicting support for one or more of the models; for models where any of these variables was not significant, it was not included.

[Slide Key] Swing Audiences: School Vouchers



Voter Coalitions: School Vouchers

- **The coalition for vouchers is fundamentally one of Republicans and racially diverse working class parents who live in cities.**
 - Black non-college urban Independent parent 18-54 = **90% two-way voucher support** (with description).
 - White non-college suburban Republican parent 18-54 = **81% two-way voucher support** (with description).
- **The coalition more resistant to vouchers is one of Democrats, seniors, and white college adults.**
 - White college suburban Democratic non-parent 65+ = **43% two-way voucher support** (with description)
- **Highly-engaged Republican base groups are cross-pressured.**
 - White non-college rural Republican non-parent 65+ = **74% two-way voucher support** (with description). While still high, this is slightly less than the national average of 76% two-way support. Republican college-educated seniors in the suburbs have even lower support levels, in the 60s.

OK. SO WHAT?

It's one thing to know how strong the support for educational choice is and understand which demographic groups support choice...

It is quite another thing to understand which groups are actually interested in making another choice and what messages drive them to actually choose.

Enter Heart and Mind Strategies

**Indiana Choice
Scholarship
Awareness and
Action Campaign**

**Prepared for
EdChoice**

**Utah Fits All
Scholarship
Awareness and
Action Campaign**

**Prepared for
EdChoice**

***Decision Drivers to Choose
Education Alternatives***

Introducing Ed Choice Segments

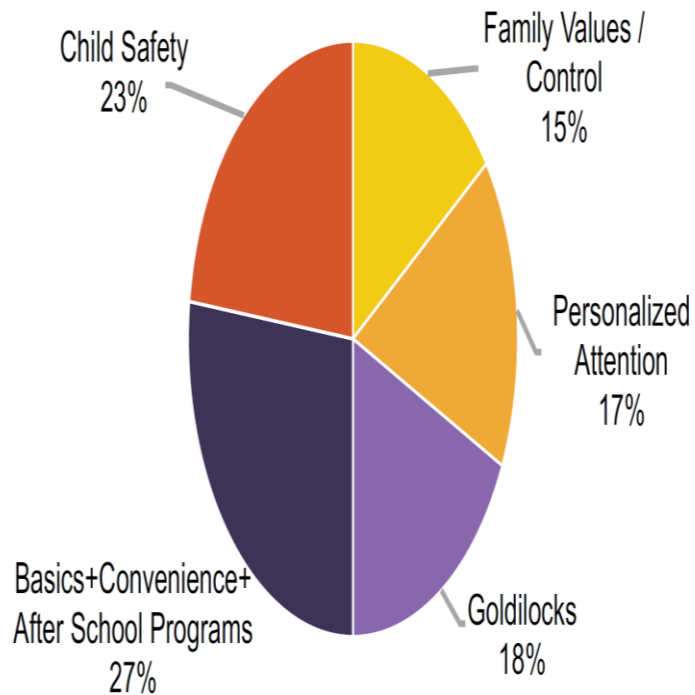
Executive Summary

Summary Highlights (cont.)

- In general, education decisions are built on three core pillars that matter to all “considering parents”:
 - safe place for child to learn
 - qualified teachers that truly care about child
 - personalized attention for child’s needs.
- There are, however, very distinct groups of parents that have additional high priority profiles

Indiana

There are discriminate segments among Considering Parents

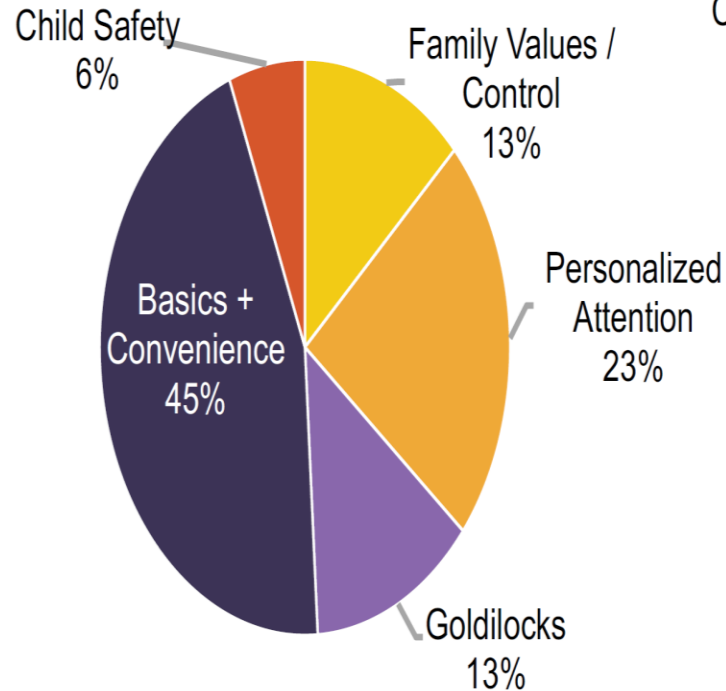


Utah

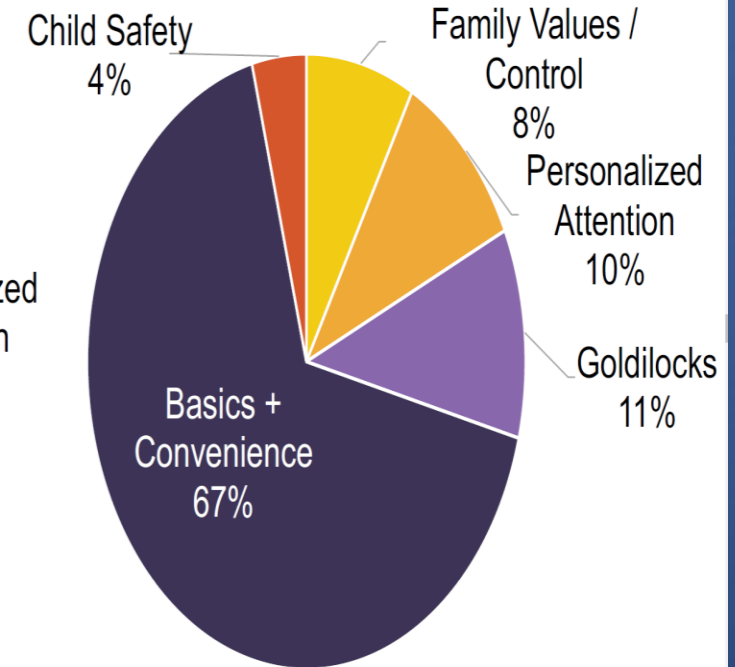
There are 5 distinct segments among Considering Parents.

Hispanic Parents are much more likely to be in the Basics+Convenience segment.

Considering Parents Segments



Hispanic Parents Segments



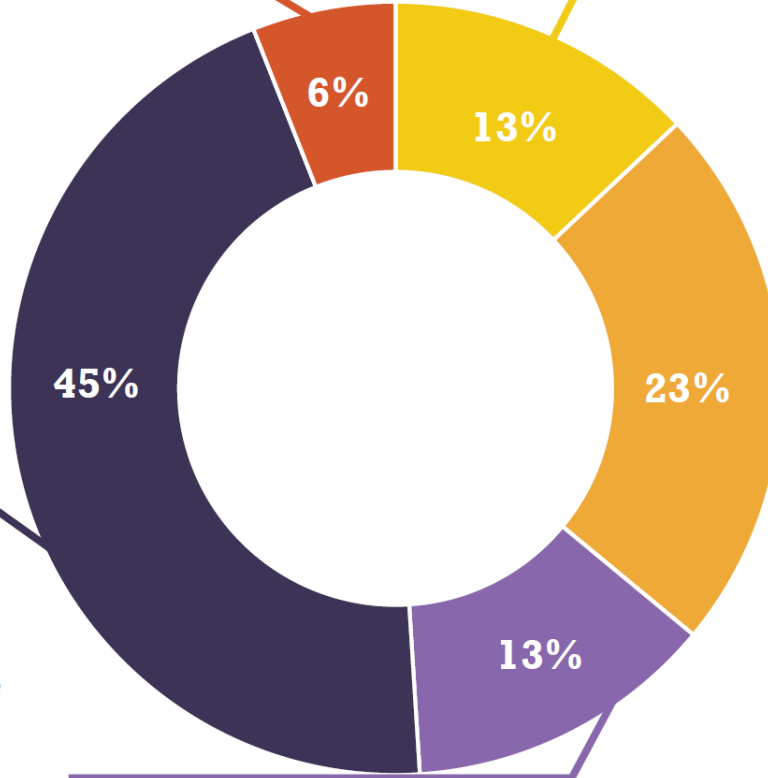
Segment Breakdown – Key Features

Segment 5: Child Safety

- A safe place for my child to learn where they will be protected from harm, bullying, and drugs
- Qualified teachers that truly care about your child and their success
- My child receives more personalized attention and instruction based on her/his needs, abilities, and interests
- An environment where my child is with other students who she/he can be comfortable with and build friendships
- A school that offers innovative and exciting learning experiences for my child

Segment 4: Basics

- Qualified teachers that truly care about your child and their success
- A more traditional school experience where my child can learn the basics in math, reading, science and other core academic subjects
- A school with opportunities to explore more specialized (STEM, arts, etc.) or career-focused subjects
- A safe place for my child where they will be protected from harm, bullying, and drugs
- A school that has a classical education approach that focuses on world history, grammar, arithmetic, logic, and Latin



Segment 1: Parent Values / Control

- Qualified teachers that truly care about your child and their success
- A safe place for my child to learn where they will be protected from harm, bullying, and drugs
- My child receives more personalized attention and instruction based on her/his needs, abilities, and interests
- I have more access and control over the materials, values, and ideas my child is taught
- A school that is more aligned with our family values

Segment 2: Personalized Attention

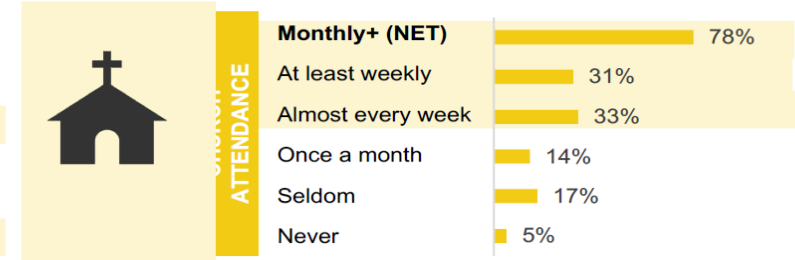
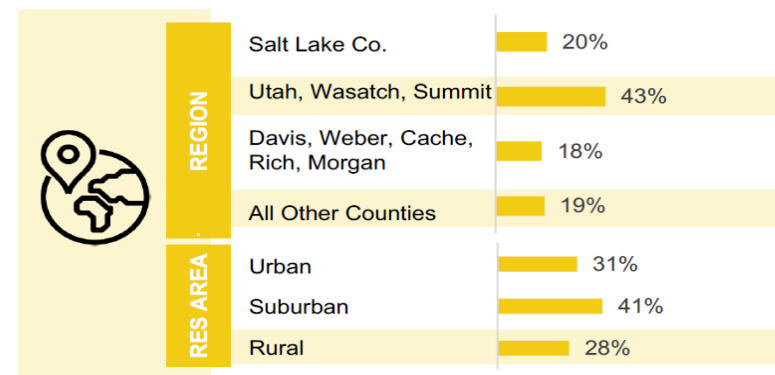
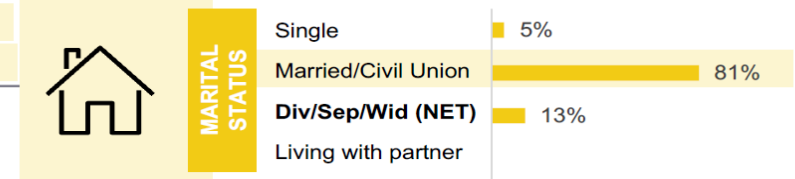
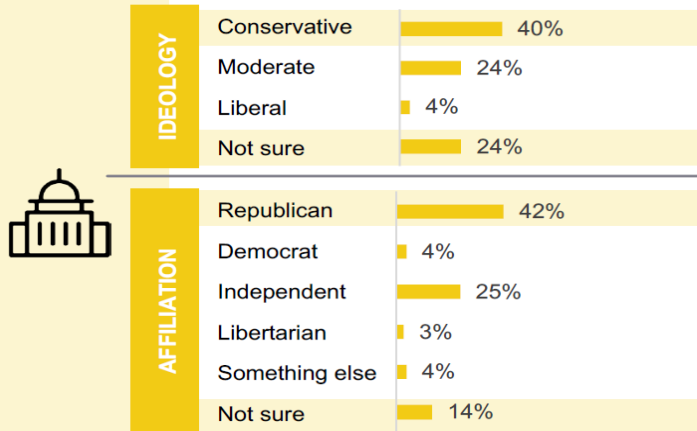
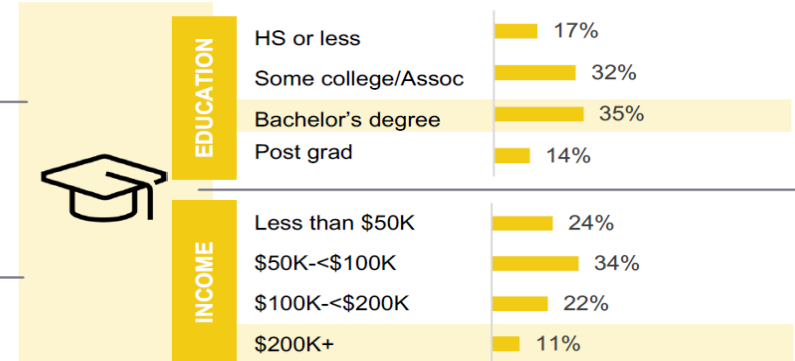
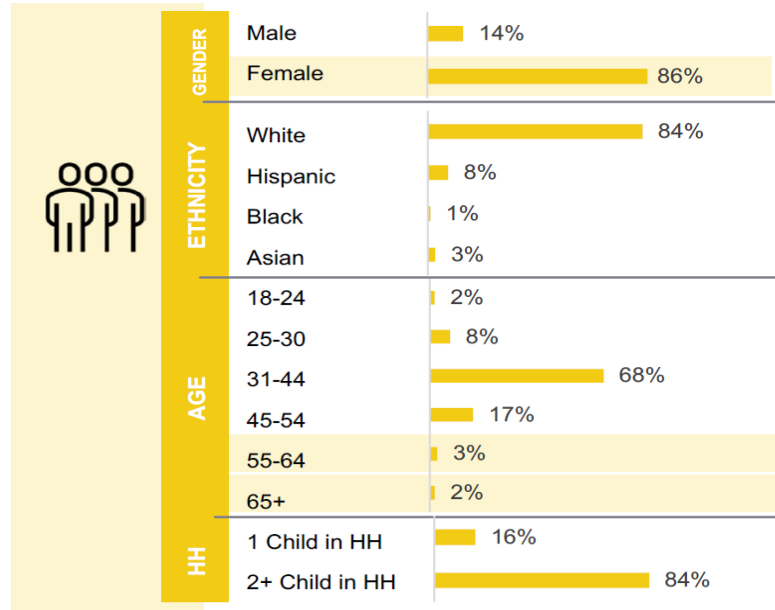
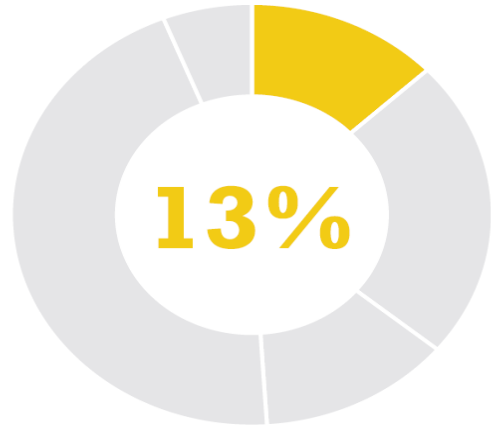
- My child receives more personalized attention and instruction based on her/his needs, abilities, and interests
- Qualified teachers that truly care about your child and their success
- A school that offers tutoring and additional support if my child needs it
- A safe place for my child to learn where they will be protected from harm, bullying, and drugs
- A school that offers innovative and exciting learning experiences for my child

Segment 3: Goldilocks

- Qualified teachers that truly care about your child and their success
- A safe place for my child to learn where they will be protected from harm, bullying, and drugs
- A school with more opportunities to explore more specialized (STEM, arts, etc.) or career-focused subjects
- My child receives more personalized attention and instruction based on her/his needs, abilities, and interests
- A school that offers tutoring and support if my child needs it

Values / Control Demographic Profile

Values / Control are more conservative, religious, white, rural upper middle-income parents concerned with having more involvement and control over their child's educational experience in a school that aligns with their core values.

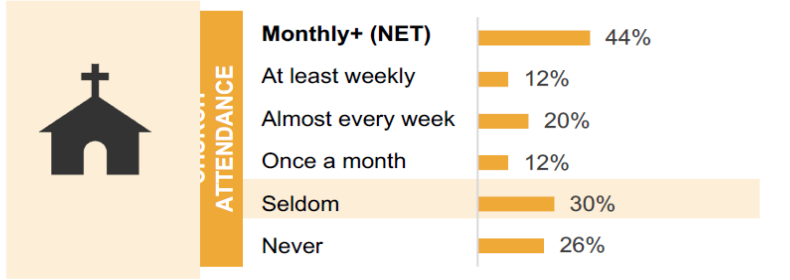
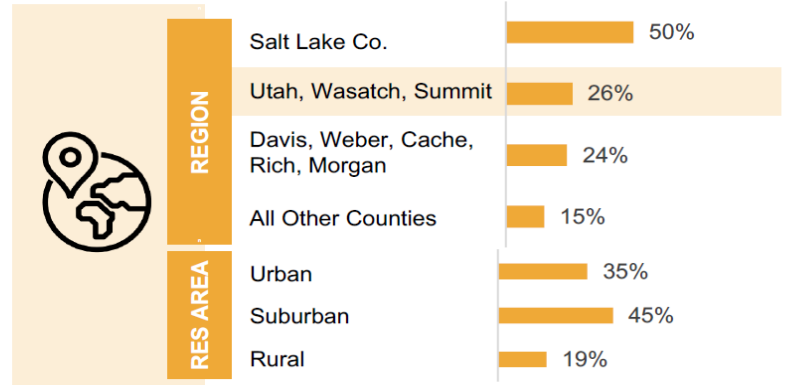
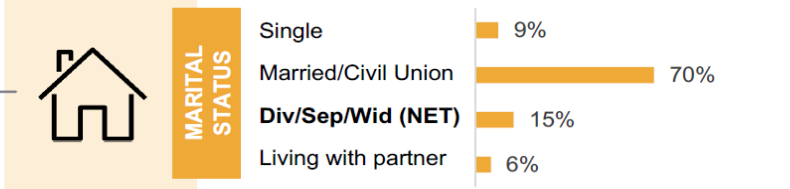
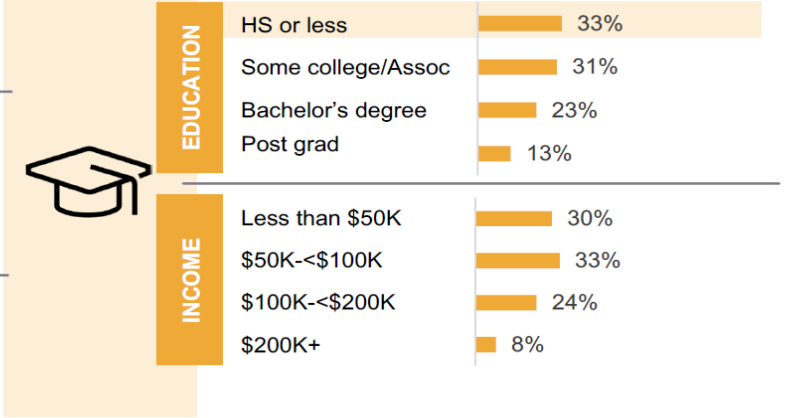
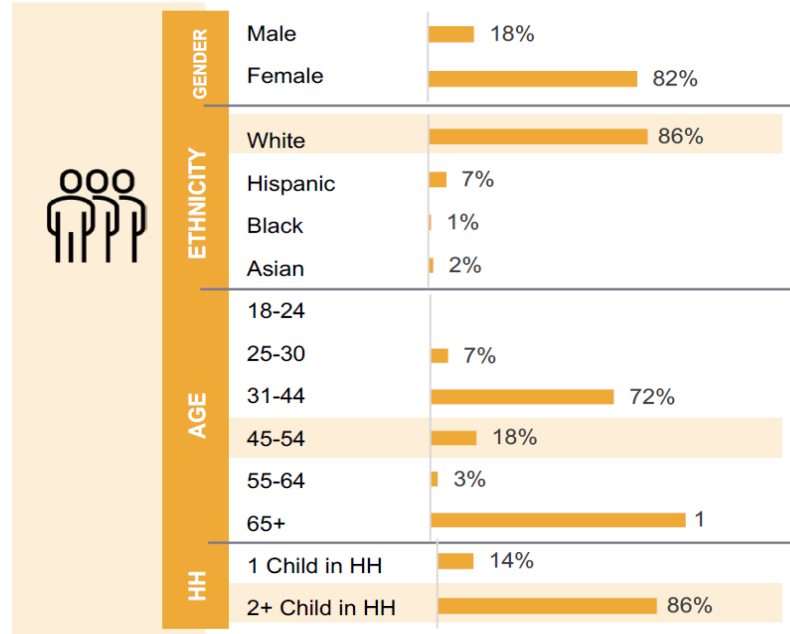
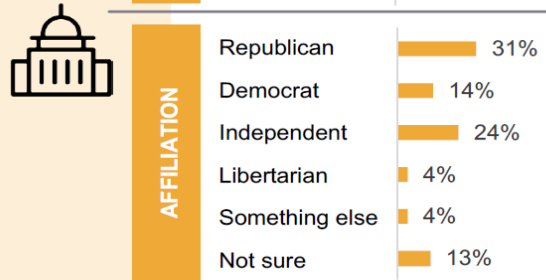
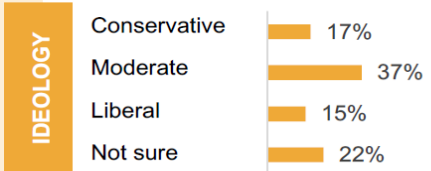
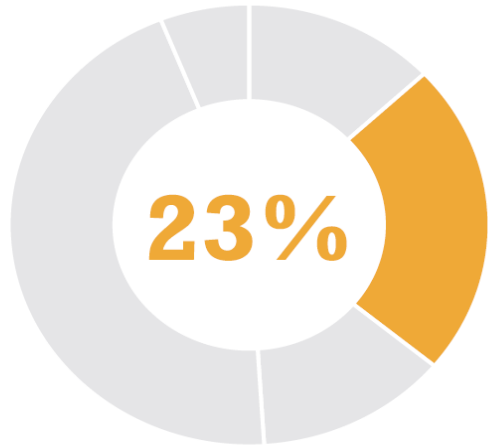


BASE: Values / Control (n=76)

- Highest among segments

Personalized Attention Demographic Profile

Personalized Attention are lesser educated, moderate non-rural white parents in multi-child households concerned with getting their children specialized attention for their needs.

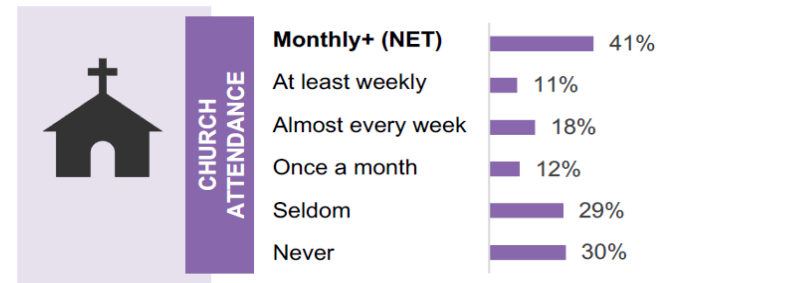
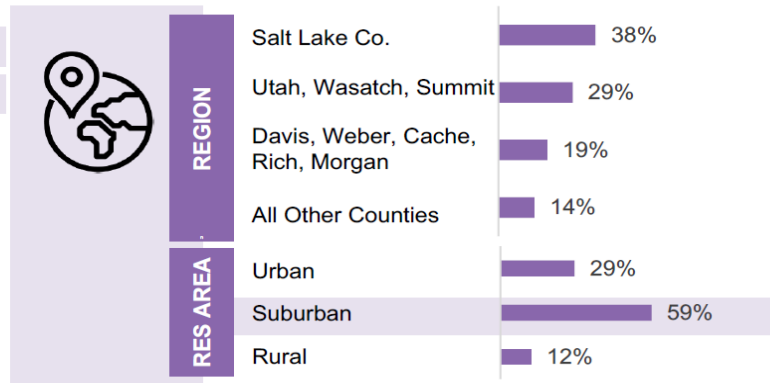
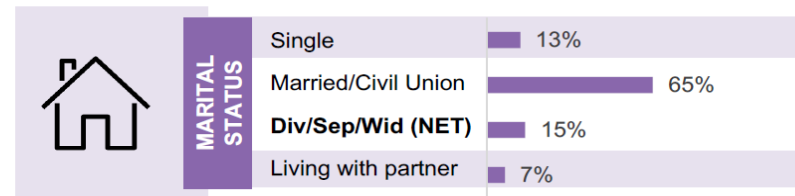
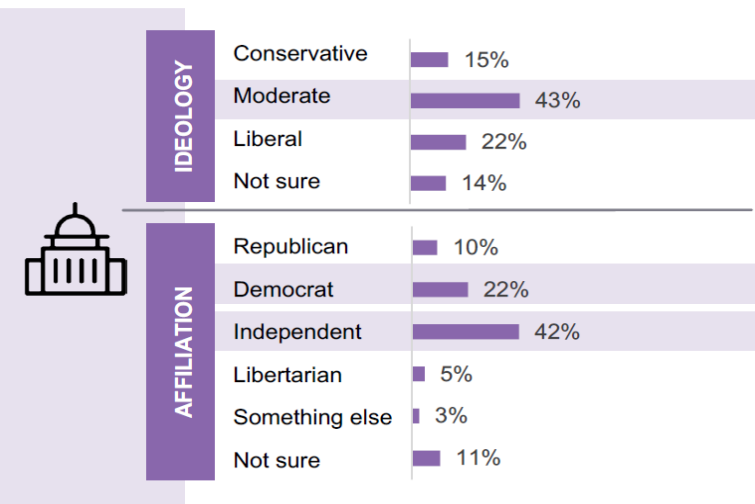
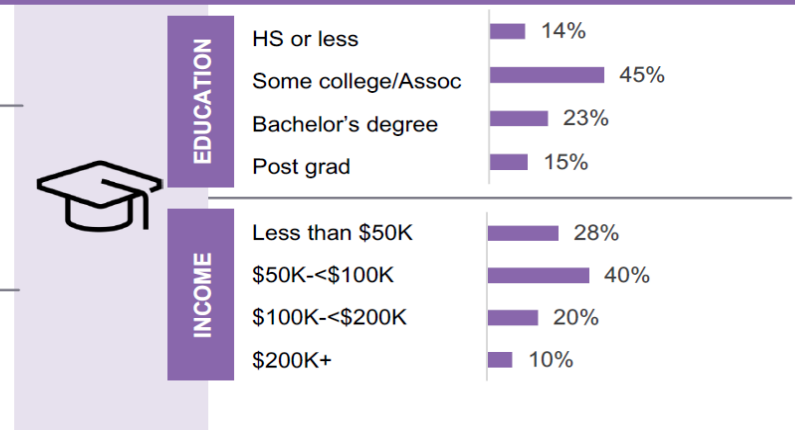
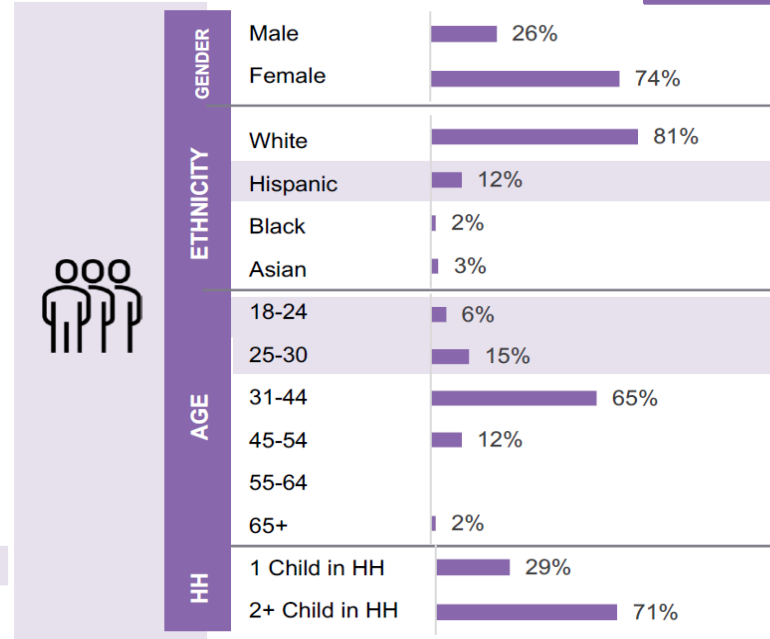
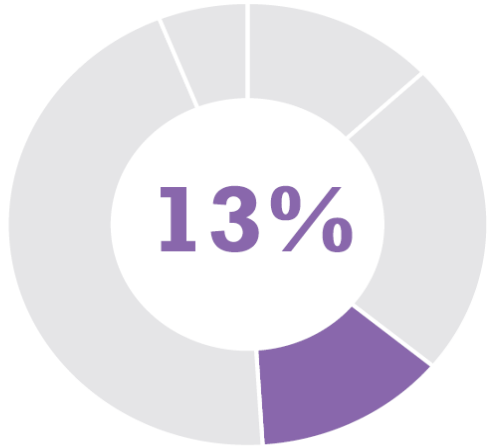


BASE: Personalized Attention (n=137)

- Highest among segments

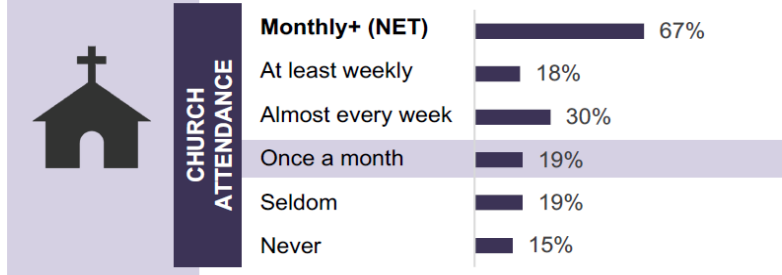
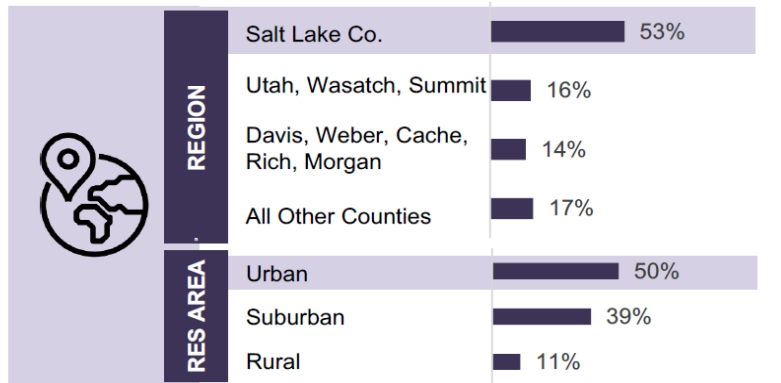
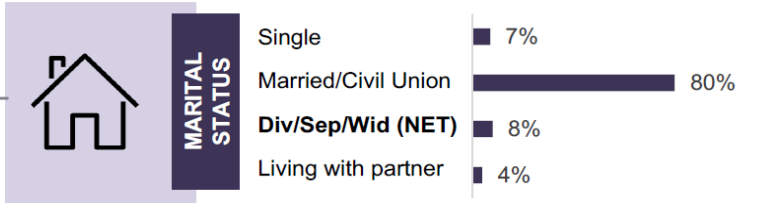
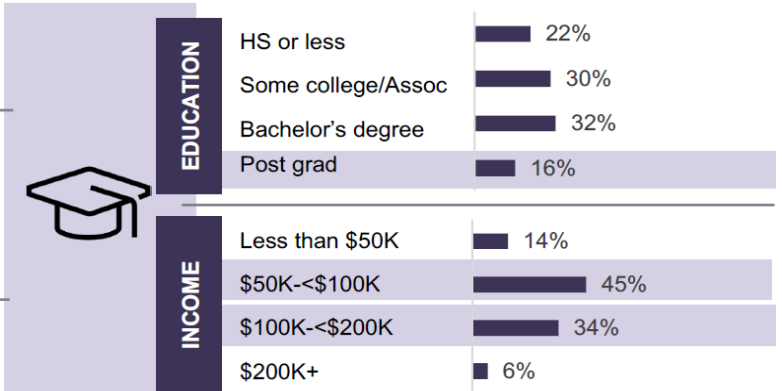
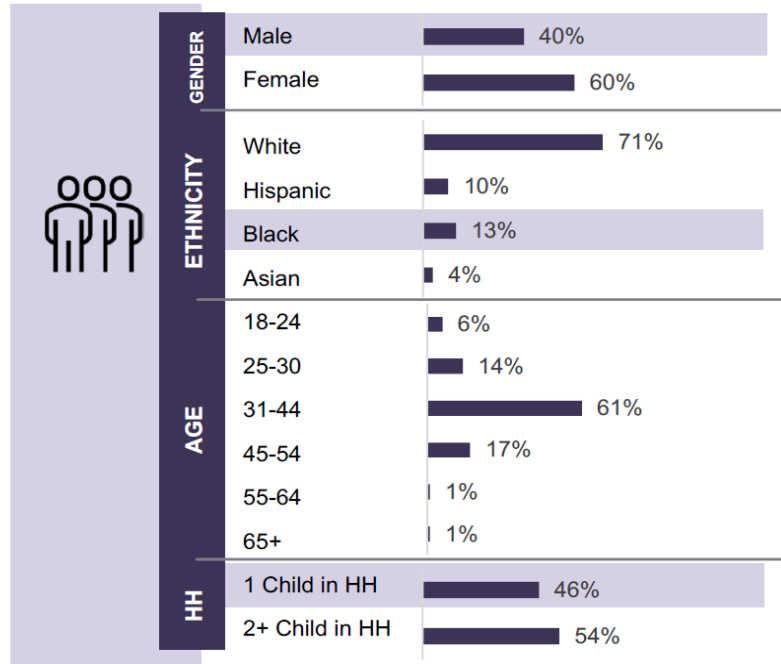
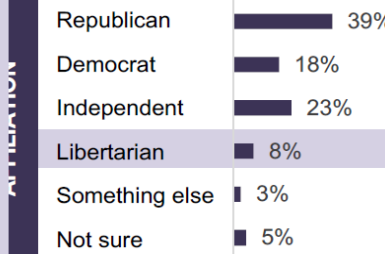
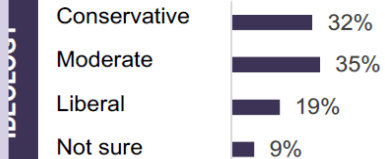
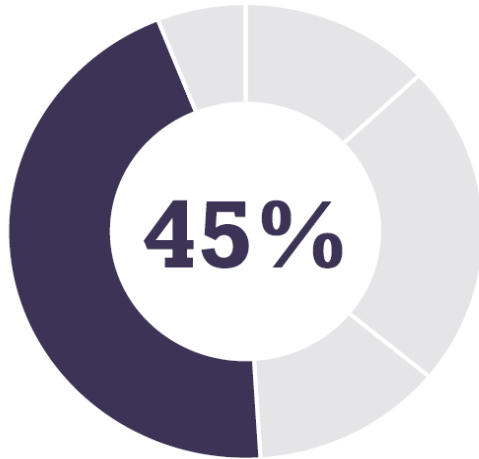
Goldilocks Demographic Profile

Goldilocks are younger, suburban, left leaning parents with some college education. They value a well-rounded educational experience for their children including an emphasis on safety and qualified teachers.



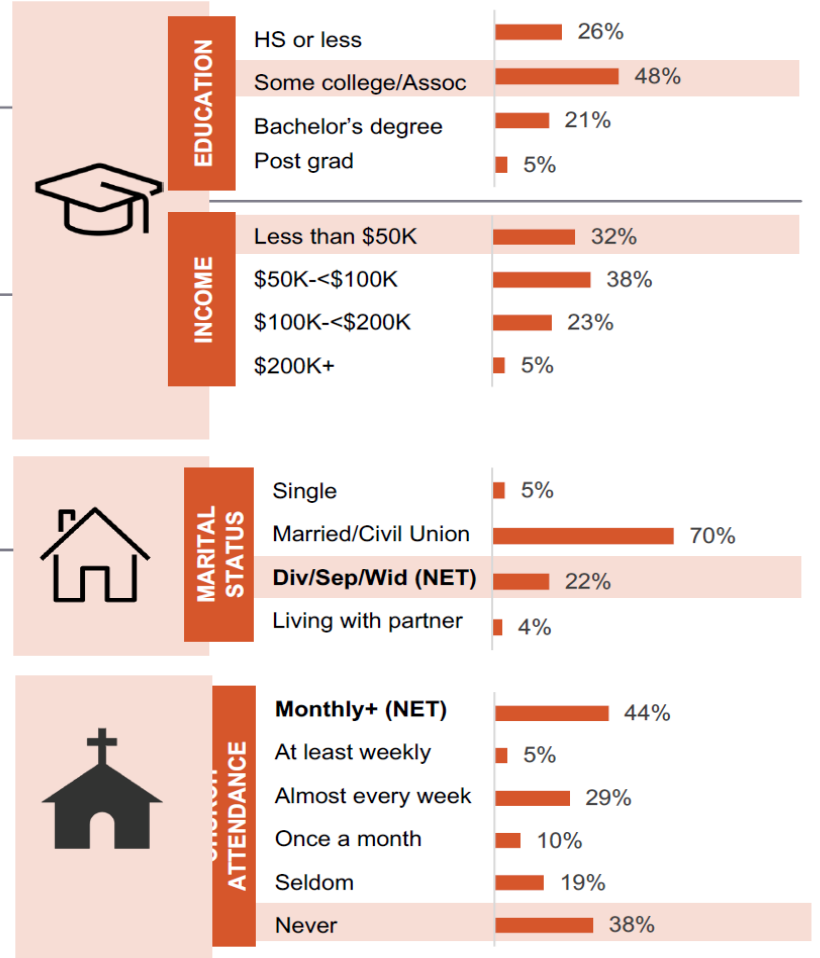
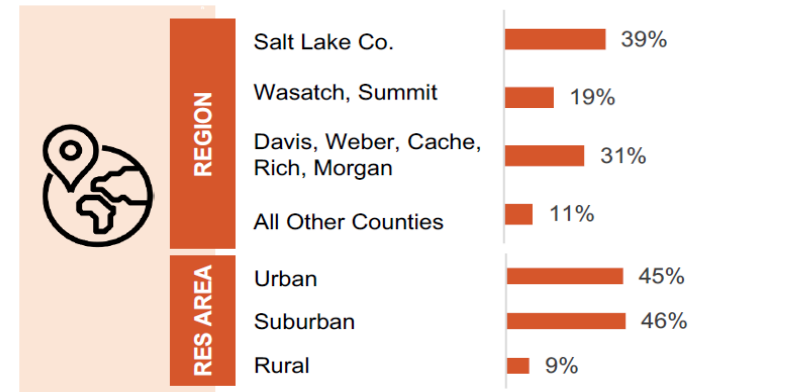
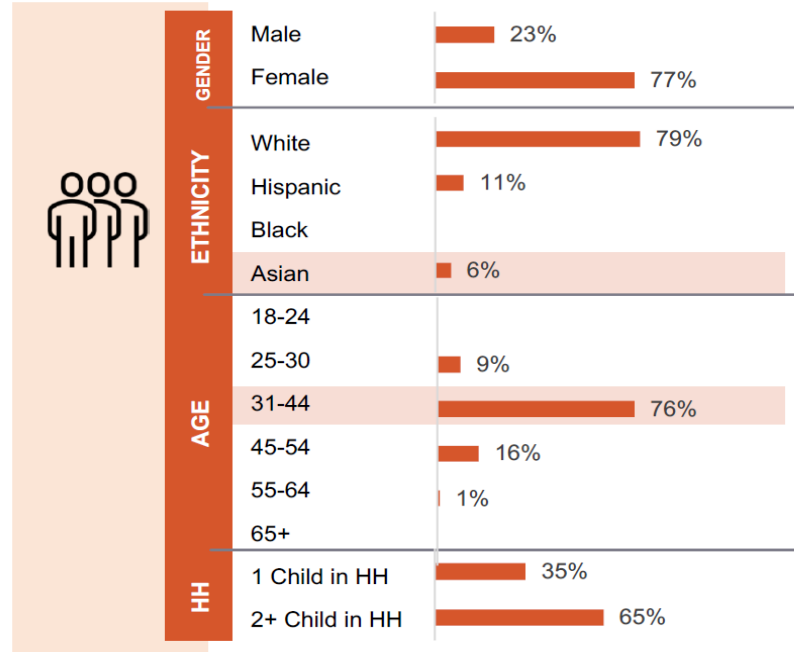
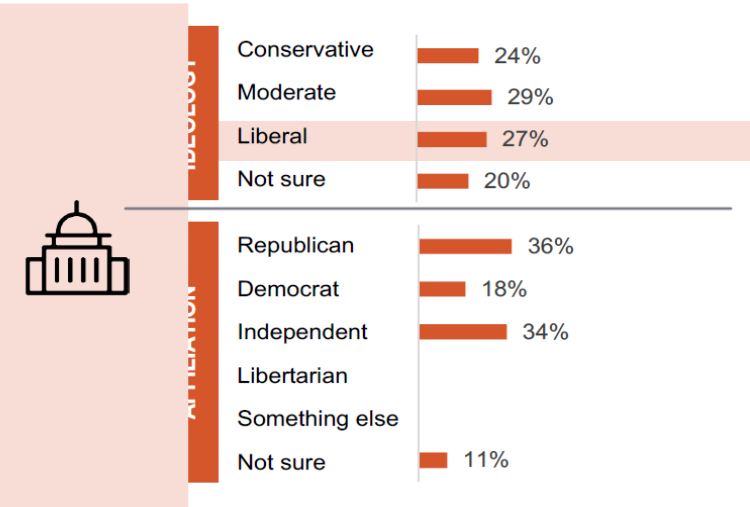
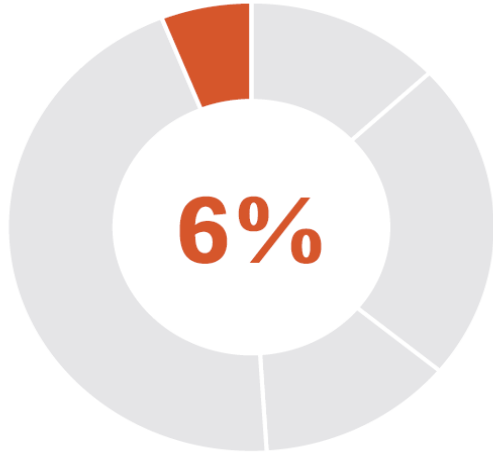
Basics Demographic Profile

Basics are more educated, middle to upper-middle income non-white urban parents who are most concerned with their child learning the basics in all core academic subjects



Child Safety Demographic Profile

Child Safety are lower income, less actively religious parents primarily concerned with a safe educational environment where their children can make meaningful relationships.



A woman with dark hair, wearing a white cardigan over a dark top, is sitting and reading a book to a young girl with braided hair, also wearing a white cardigan. They are in a classroom or library setting. In the background, there are other children sitting at a table, a globe, and various educational materials. The scene is overlaid with a blue tint. In the top right corner, there is a decorative graphic of purple and white squares of varying sizes.

Questions?