

Report on Annual Statistical Ultra-Orthodox (Haredi) Society in Israel



2023

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Executive Summary



Introduction

The 2023 Statistical Report on Ultra-Orthodox Society is the eighth such report, and is based on data from 2022, and so, does not address the wartime situation. It presents a comprehensive picture of the Haredi community in key areas, including: demographic trends, education, employment, economic situation and standard of living, the impact of COVID, and on Haredi attitudes towards core democratic values, such as separation of religion and state.

The war that broke out with the Hamas terrorist attack on southern Israel on October 7, 2023, has had repercussions for every aspect of life including the security and economic wellbeing of the country. Additionally, while there has been a heartwarming outpouring of unity both in terms of the enlistment to fight in the IDF as well as care for those left on the home front, concern is growing as to what many view as the erosion of solidarity among the diverse groups making up the fabric of Israeli society. A major axis of divisiveness is one that exists between mainstream Israel and the ultra-Orthodox (Haredi) sector. Resentment towards Haredim is growing, particularly around the issue of “sharing the burden” – both with regard to military service, the price paid by the Israeli taxpayer for the heavy reliance of the Haredi community on government budgets, and the low rate of employment among Haredi men.

At the same time, as this Report indicates, internal trends within the Haredi community give cause for cautious optimism for integration in Israeli society and its economy. In contrast with prevalent stereotypes, Israel's ultra-Orthodox sector is a mosaic of diverse streams, located on a continuum of conservative to “modern.” In recent years, we are seeing a consistent and growing move towards modernism among significant segments of the Haredi community, sometimes referred to as the “new” or “pragmatic” Haredim. The most recent indicator of this trend is the

Haredi community's mobilization to contribute towards the war efforts. Since October 7th, we have seen the creation of various large-scale volunteer initiatives to aid soldiers and others impacted by the war, and a great deal of focus, concern, and prayers for success in this war in Haredi communities. There has even been a small increase of ultra-Orthodox enlistment in the IDF among older men signing up for a shortened form of military service.

Along with these internal trends, on the political front, Israel's political map is likely to be transformed in the aftermath of the war. The events leading up to and during the war may lead to calls for significant change in the relationship between the Haredim and the rest of society. In addition, the economic fallout from the war will make it impossible to continue the current massive budget allocations to the Haredi sector, and we can anticipate a swell of demand for greater "share in the burden." The data in this report can serve as a roadmap for experts and decision-makers as they plan a way forward in the post-war reality with the goal of creating a more unified, secure, and prosperous State of Israel.

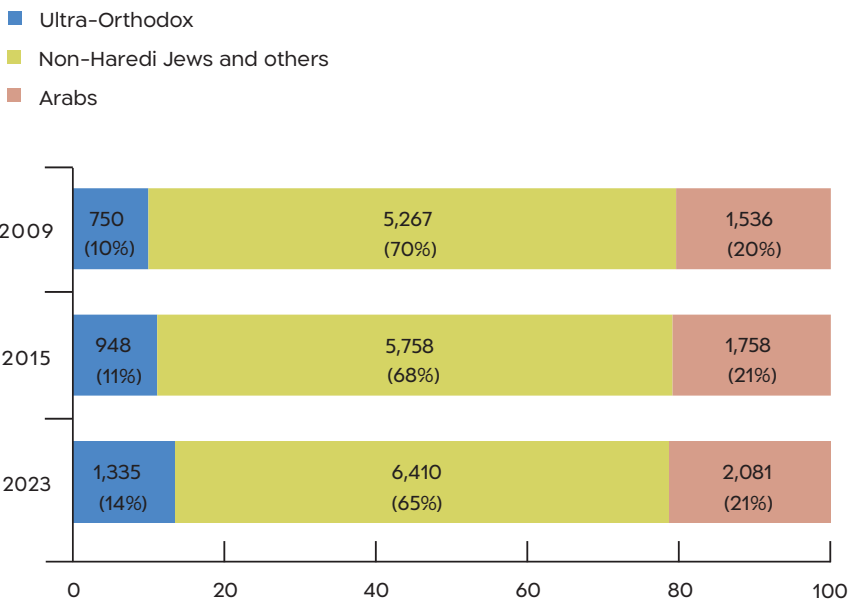
The Statistical Report on Ultra-Orthodox Society is produced by the Israel Democracy Institute's Program on Ultra-Orthodox in Israel in the Joan and Irwin Jacobs Center for Shared Society. The program focuses on studying trends in ultra-Orthodox society and on shaping public policy for ultra-Orthodox integration into Israeli society.

Chapter 1

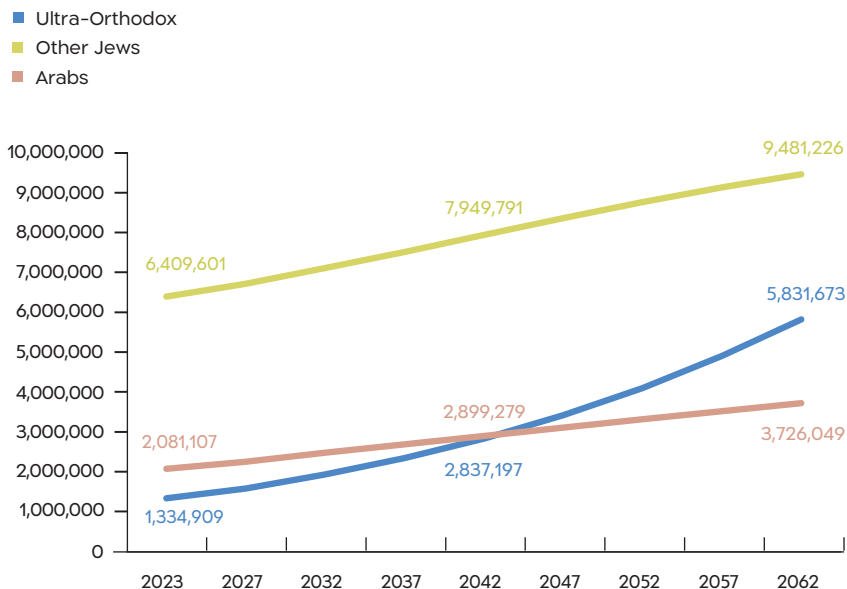
Population

The growth rate of the ultra-Orthodox (Haredi) population in Israel is the highest of any of the populations in developed countries, at around 4% per year. The factors underlying this particularly rapid growth are high fertility rates, modern standards of living and medicine, a young average age at marriage, and large numbers of children per family. Consequently, the ultra-Orthodox population in Israel is very young, with around 60% under the age of 20, compared with 31% of the country's general population. In 2023, the Haredi population numbered around 1,335,000, up from 750,000 in 2009, and constituting 13.6% of Israel's total population. According to Central Bureau of Statistics (CBS) forecasts, its relative size is expected to reach 16% in 2030, and it will number two million people in 2033.

Population of Israel, by population group (in millions)



Population forecast, by population group



Analysis of the patterns in the ultra-Orthodox family over the last decade and a half reveals a sizable drop in fertility rates, from 7.5 live births per woman in 2003–2005 to 6.4 in 2020–2022. Despite this decrease, this rate is still much higher than the average fertility rate among other Jewish women in Israel, which stands at 2.5. The average age at first marriage among ultra-Orthodox men was around 23 in 2021, and around 22 among ultra-Orthodox women, and the average age at birth of the first child was 24 for men and 23 for women.

The geographical distribution of the Haredi population reveals two “capital cities”—Jerusalem and Bnei Brak, which were home to 41.5% of Israel’s ultra-Orthodox citizens in 2022 (24.4% in Jerusalem and 17.1% in Bnei Brak). An additional 26% live in a series of ultra-Orthodox satellite cities, including Beit Shemesh, Modi’in Illit, Beitar Illit, and Elad. A third group can be found in more established large cities such as Ashdod, Petah Tikva, Haifa, Rehovot, and Netanya, in which 11% of the ultra-Orthodox population reside. Together, these three categories of localities with a high percentage of the Haredi population—encompassing 11 cities in total—account for 78.5% of the ultra-Orthodox population of Israel.

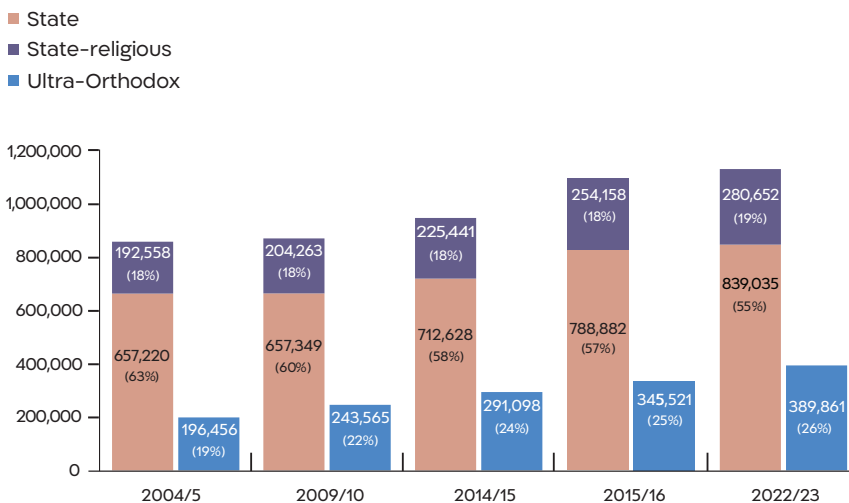
Chapter 2

Education

Since the beginning of the millennium, there has been a rapid increase in the number of students in ultra-Orthodox education frameworks, reaching around 390,000 in the 2022-2023 school year, including both elementary and secondary education. Ultra-Orthodox education now constitutes 26% of the Hebrew-language (Jewish) education system in Israel, and 20% of the entire Israeli education system.

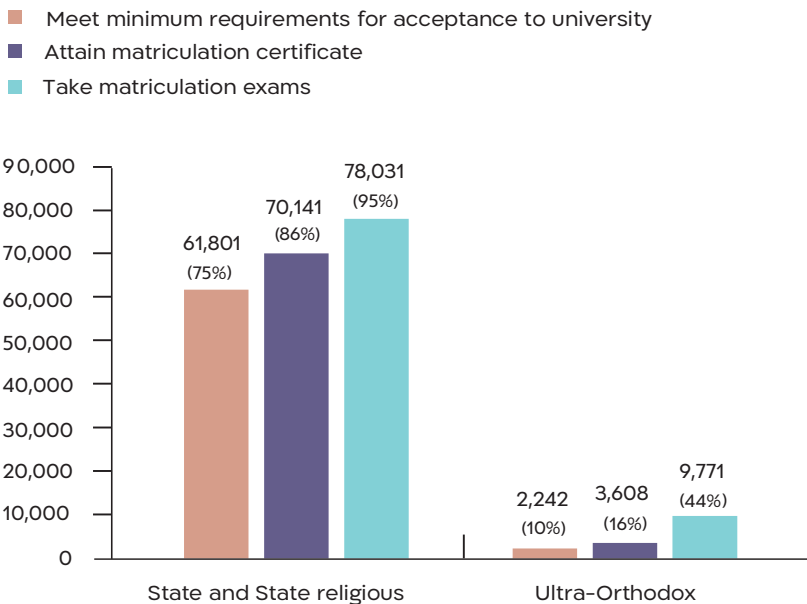
The last decade has seen several systemic and structural changes in ultra-Orthodox education, including the establishment of the Haredi Department in the Ministry of Education and of the State-Haredi education stream. Only 4% are State Haredi schools; 73.5% are in the category of "recognized" by the state under the compulsory education law, and 22.5% — schools which are "exempt" from the compulsory education law.

Students in Hebrew-language education, by category of Ministry of Education supervision



In the 2020-2021 school year, 69% of ultra-Orthodox girls took at least one matriculation (Bagrut) exam, representing an increase of 10 percentage points since the 2019-2020 school year, and compared with just 31% a decade earlier, in 2008–2009. However, during the same period there was a slight decline in the percentage of boys taking matriculation exams, from 16% to 15%. The proportion of students who gained a matriculation certificate in the ultra-Orthodox sector in the 2020-2021 school year was just 16%, compared with 86% in the State and State-religious education streams.

Students taking matriculation exams, attaining a matriculation certificate, and meeting minimum university requirements, by category of Ministry of Education supervision

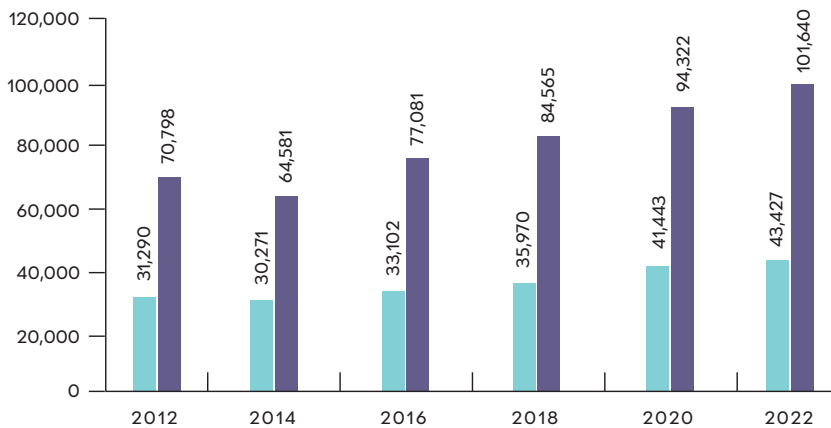


There are four tracks in the post-secondary education system for Haredi men: studies in a yeshiva; studies in a kollel (full time advanced Torah study frameworks for married men); academic studies; and vocational training. For ultra-Orthodox women, the options are studying in a seminar (ultra-Orthodox post-secondary educational institutions, which also offer vocational training) or pursuing academic studies. Between 2014–2022, there was a 53% increase in the number

of yeshiva and *kollel* students in Israel, reaching 145,067 in 2022. This rise likely stemmed from increased state support for these students, which also brought to a halt the trend of more and more ultra-Orthodox men into the workforce.

Yeshiva and *kollel* students

■ Yeshiva students
■ Kollel students

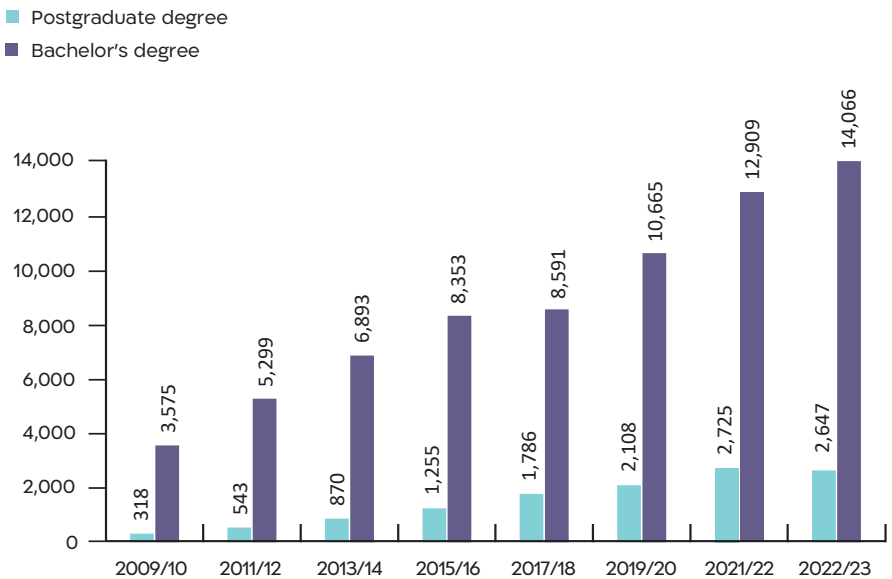


The number of Haredi students in higher education frameworks has grown rapidly. Between 2010 and 2023, their number grew by 258%, compared with a 17% increase in the overall number of students in Israel. In 2009–2010, ultra-Orthodox students constituted around 2% of the total student body; this leaped to 5% by 2022–2023. During this 12-year period, the number of ultra-Orthodox students rose by an average of 10% annually.

The total number of Haredi students in higher education stood at around 16,700 in 2022–2023. The subjects they choose to study are mostly practical and those that allow them to work within the ultra-Orthodox community or to enter professions that are in demand in the labor market (such as teaching and education, paramedical professions, business administration, and law). Haredi students choose mainly to attend colleges, due to their lower entry requirements, and only

10% study at universities (not including the Open University)—compared with 34% of other Jewish students. The dropout rate of ultra-Orthodox students between the first and second year of academic studies has fallen in recent years and is now equivalent to the dropout rate among other Jewish students. The number of Haredi students in technological vocational training (under the auspices of MAHAT, the Government Institute for Technology and Science Training) stood at more than 7,000 in 2022.

Ultra-Orthodox students in higher education



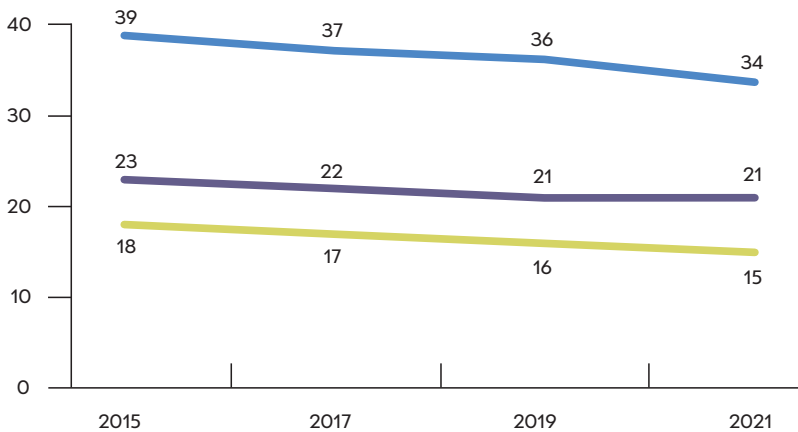
Chapter 3

Standard of Living

The prevalence of poverty among Israel's ultra-Orthodox population and its impact on the standard of living, is much greater than in the rest of the Israeli population. While there has been a sizable decline in the poverty rate among the ultra-Orthodox since 2015, it remains very high, standing at 34% in 2021—significantly higher than among the general population (21%).

Poverty rate among families, by population group (%)

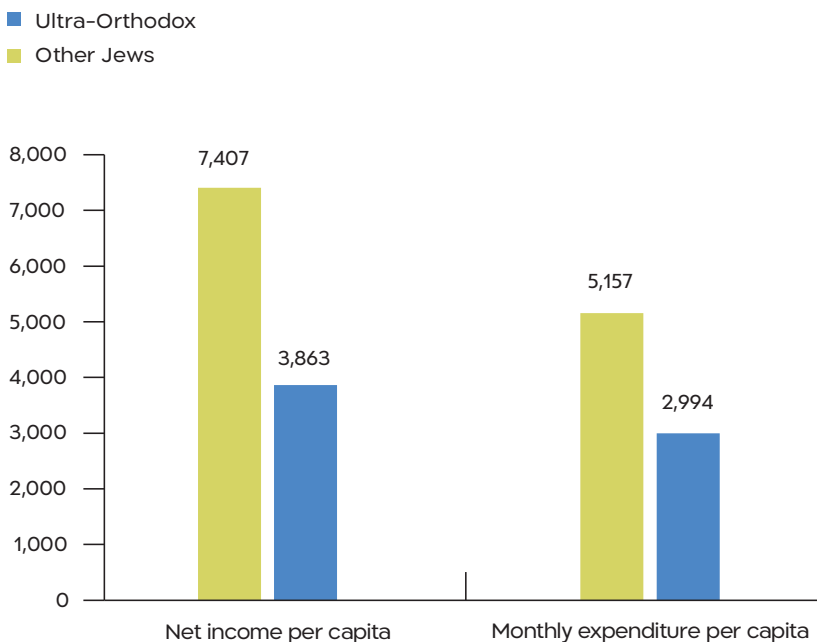
- Ultra-Orthodox
- Other Jews
- Total population



Standard of living is closely linked to household income and expenditures. In 2021, the average gross monthly income for Haredi households was NIS 14,978—far lower than the average for other Jewish households in Israel (NIS 22,047). The factors behind this low level of income include the fact that many households rely on the earnings of a single breadwinner (generally the woman), working relatively few weekly hours in a low-paying job, and with fewer funds in investments or in pension plans.

An assessment of monthly household expenditure reveals that the ultra-Orthodox spent an average of NIS 2,994 per capita, compared to NIS 5,157 per capita among other Jews. To some extent, these differences can be explained by the ultra-Orthodox consumer culture, which puts a high premium on thriftiness, as well as by consumer outlets for the ultra-Orthodox population, at which shoppers can buy products more cheaply, and even receive them for free on occasion.

Monthly income and expenditure per capita (NIS)



Analysis of data on the standard of living in the ultra-Orthodox public, reveals that the differences—as compared to the rest of the Jewish public in Israel—remain large, but have become somewhat smaller in recent years. This is true of income, poverty rates, consumption, and access to motor vehicles. The only area in which findings for the two populations are comparable is in home ownership, where we see that 78% of Haredim owned a home, compared to 72% of other Jews.

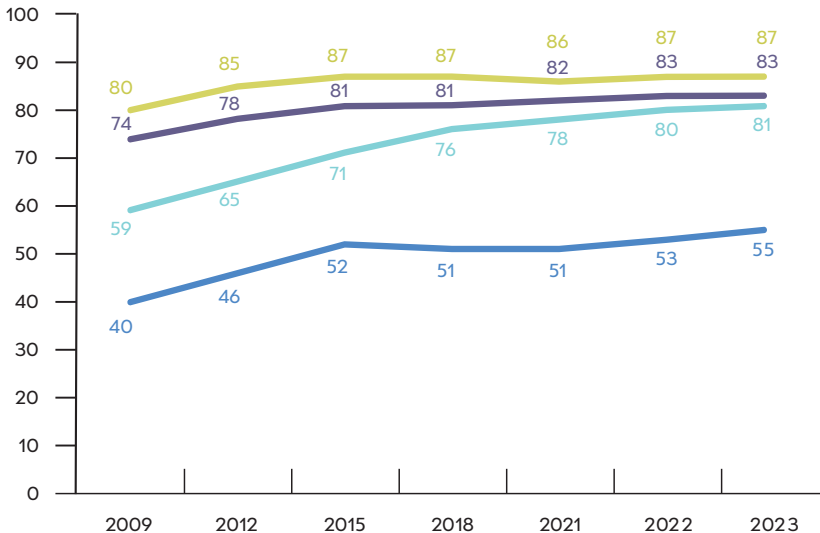
Chapter 4

Employment

One of the main topics of public debate regarding the place of the ultra-Orthodox community in Israeli society, is employment. In 2002, around one-third of ultra-Orthodox men were employed, and just over half of ultra-Orthodox women. Between 2003 and 2015 there was a major surge in ultra-Orthodox employment rates for both men and women, resulting from a combination of economic need in the community and of public policy designed to promote entry of ultra-Orthodox Israelis to the labor market by various means. As a result, more than half of ultra-Orthodox men (53%) and more than three-quarters of ultra-Orthodox women (79.6%) are now employed. However, the rise in employment rates among men has come to a halt in recent years (2016–2022).

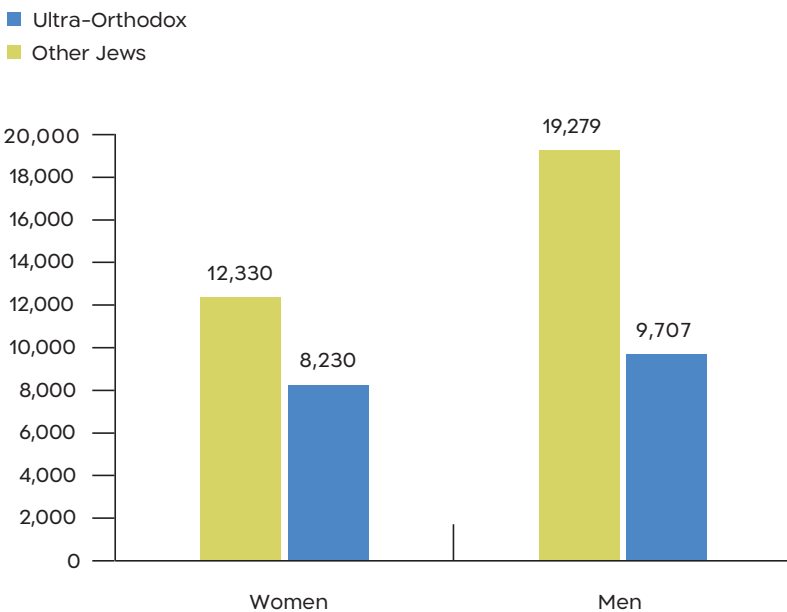
Employment rates, ages 25–66, by population group (%)

- Ultra-Orthodox men
- Ultra-Orthodox women
- Other Jewish women
- Other Jewish men



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Average gross monthly income from employment, ages 25–66, by population group (NIS)



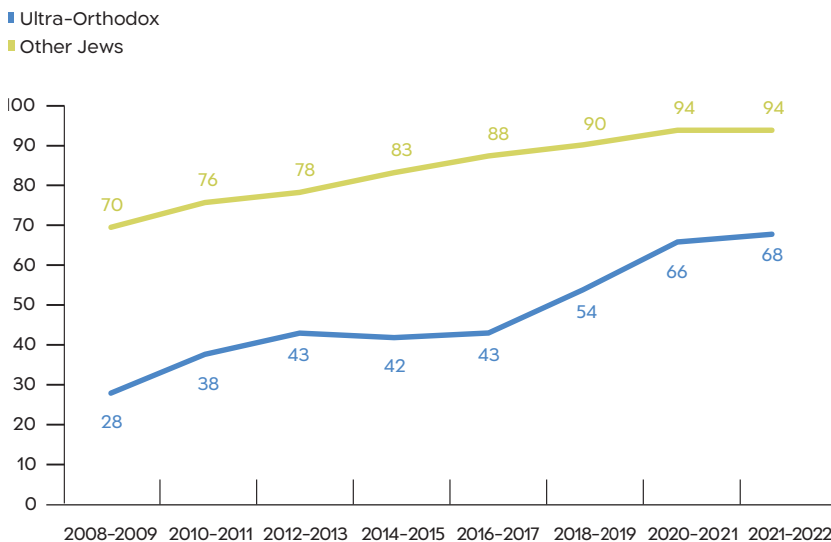
In the last eight years which we examined (2014–2022), we have not seen a trend towards narrowing the difference between the industries in which ultra-Orthodox men and women are employed and those in which other Jewish men and women work.

Chapter 5

Lifestyles

Lifestyles in the ultra-Orthodox community are in constant flux, and serve as a good source for understanding the relations between ultra-Orthodox society and the general Israeli society. Regarding military service and national civilian service, for example, recent years have seen a decline in participation among the ultra-Orthodox—in 2020, only 1,185 ultra-Orthodox men entered military service, and just 569 entered national civilian service. On the other hand, when it comes to internet usage, the gaps between the ultra-Orthodox and the rest of the Israeli public have narrowed, with 68% of the ultra-Orthodox and 94% of other Jews reporting that they are regular internet users. Similarly, there has been a rise in the share of ultra-Orthodox Israelis with access to a motor vehicle and of those who have a driver's license. In light of the increased ultra-Orthodox participation in these areas of life, it can be stated that the trend towards social and economic integration of ultra-Orthodox society into general society is gaining strength.

Use of the Internet among ages 20+, by population group (%)

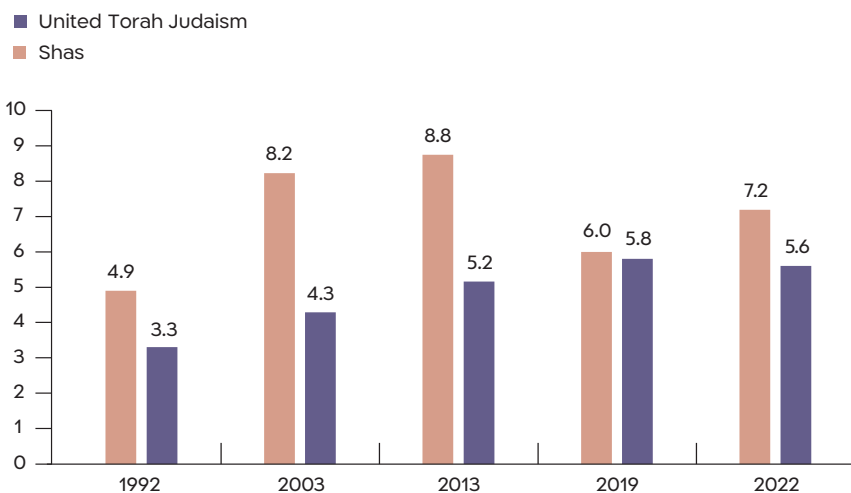


Over the past decade, the growing numbers of ultra-Orthodox Israelis in higher education and the growing numbers of women who are employed, is creating greater disposable income, awareness of consumer and leisure culture, and a more modern discourse among the growing middle class in ultra-Orthodox society. The communal and social characteristics of the Haredi sector find expression in volunteer activity (40% of the ultra-Orthodox volunteer, as compared with 23% of other Jews) and in making major financial contributions to the community (89% of the ultra-Orthodox ages 20 and over versus 61% of other Jews). Note that the data do not account for the rise in volunteerism following the October 7, 2023 attack.

We also analyzed voting patterns for the United Torah Judaism and Shas electoral lists in Knesset elections, which are indicative of the political power of the ultra-Orthodox parties, the geographical distribution of the ultra-Orthodox public in Israel, and the internal composition of the population residing in locales with heavy concentrations of Haredim.

Between 1992 and 2022, the overall share of the vote gained by Shas and United Torah Judaism rose from 8.2% to 14.1%. In addition, there has been a change in the geographical distribution of voters for these lists, reflected in the growing importance of the ultra-Orthodox satellite cities and the declining relative importance of Jerusalem and Bnei Brak.

Voting for United Torah Judaism and Shas, by election year (%)



Chapter 6

Effects of COVID-19, Views on Democracy and the Media, and Religion in Israel

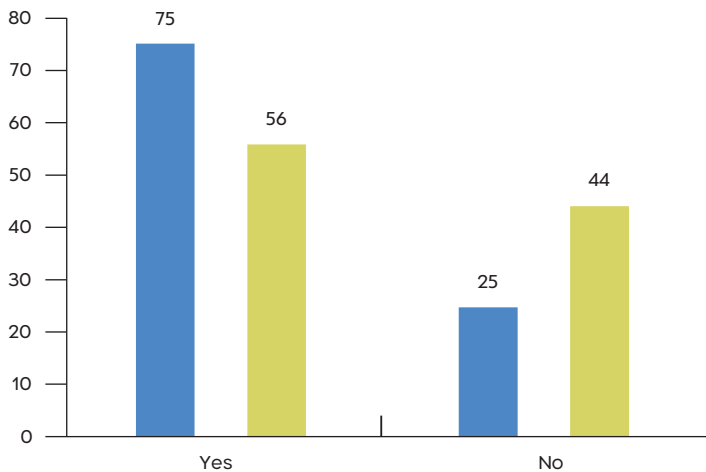
For 2022, the non-standard questions in the CBS Social Survey concerned the socioeconomic effects of the COVID pandemic, views on democracy and the media in Israel, and religion and state.

The Effects of COVID-19

During the pandemic, Haredim became ill with the virus and lost family members at higher rates than the rest of the population: 75% of Haredim report that they had COVID-19, compared with 56% of other Jews. Furthermore, 28% of Haredim reported that they lost a family member or friend due to the virus, compared with just 12% of non-Haredi Jews.

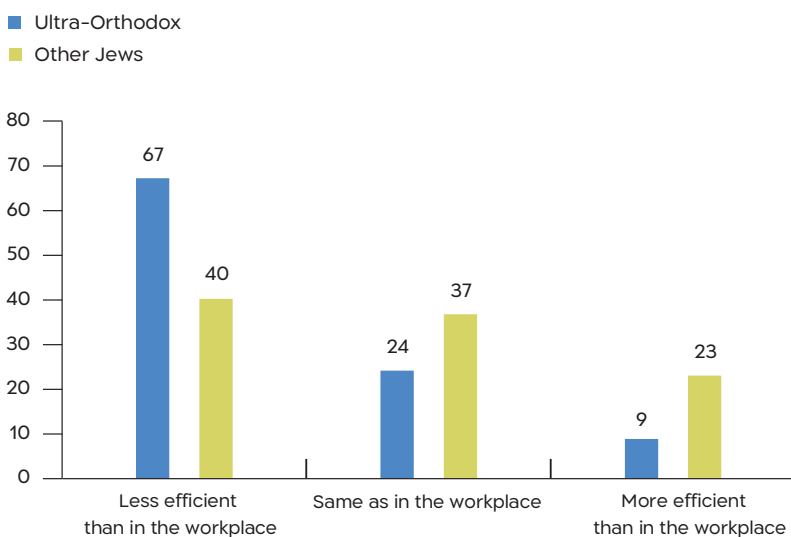
Had the COVID-19 virus, by population group, 2022 (%)

■ Ultra-Orthodox
■ Other Jews



One of the long-term consequences of the pandemic was the widespread shift to working from home. In this regard, similar trends were reported by both Haredi and non-Haredi Jews, with 25% of Haredim saying that they switched to working from home (fully or partially) because of COVID, compared to 24% of non-Haredi Jews. However, Haredim had a more negative outlook on working from home than did other Jews: 67% of Haredim reported that working from home is less efficient than being in the workplace, compared with just 40% of non-Haredi Jews. Accordingly, only 9% of Haredim said that working from home is more efficient, compared with 23% of other Jews.

Relative efficiency of working from home, by population group, 2022 (%)



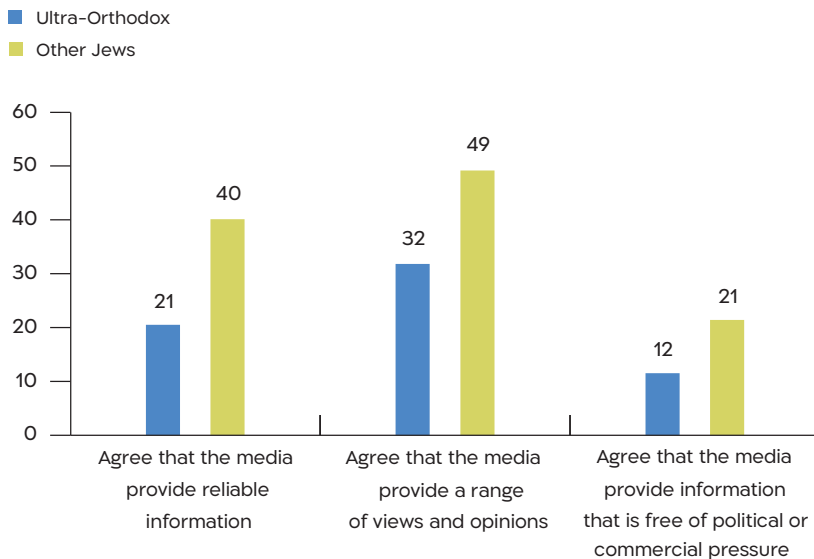
Democracy and the Media

In the Haredi public, there is a clear trend of dissatisfaction with democracy in Israel: 75% reported that they are "not so satisfied" or "not at all satisfied" with the way in which democracy works in Israel, compared with 45% of non-Haredi Jews.

The tendency of Haredim to express dissatisfaction with the state of democracy in Israel is also evident in their attitude toward the media and freedom of speech: 55% feel "very free" or "somewhat free" to express their opinions about the functioning of the government on the various media platforms, on social media, or in online comments sections, compared with 67% of non-Haredi Jews. Haredim

also have a more negative view of the traditional media outlets in Israel, with 21% saying that they "strongly agree" or "somewhat agree" that the traditional media (television, radio, and the press) provide reliable information, compared with 40% of non-Haredi Jews. In general, Haredim view the media as less reliable than do other Jews.

Views on the media in Israel, by population group, 2022 (%)



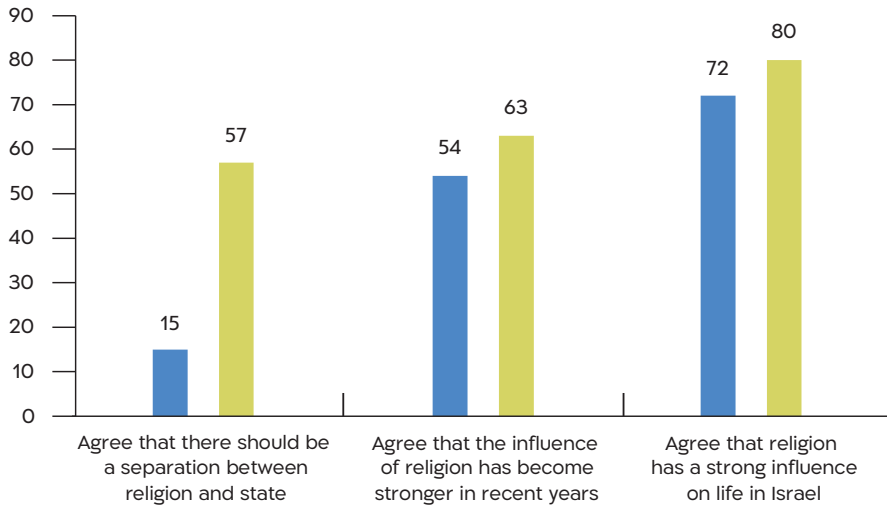
Religion

On the topic of religion, 72% of Haredim and 80% of non-Haredi Jews agree ("strongly" or "somewhat") that religion has a strong influence on life in Israel. The majority of Haredim (54%) also agree ("strongly" or "somewhat") that the influence of religion has grown stronger in recent years, as do 63% of non-Haredi Jews.

However, when it comes to the issue of separating religion and state, there is a very large discrepancy between Haredi and non-Haredi Jews, with only 15% of Haredim in favor of a separation between religion and state, compared with fully 57% of other Jews. In addition, Haredim reported a worsening in relations between religious and secular Israelis due to the COVID-19 pandemic.

Views on the influence of religion in Israel, by population group, 2022 (%)

- Ultra-Orthodox
- Other Jews



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