

The Statistical Report on the Ultra-Orthodox Society in Israel: 2019

Selected Findings

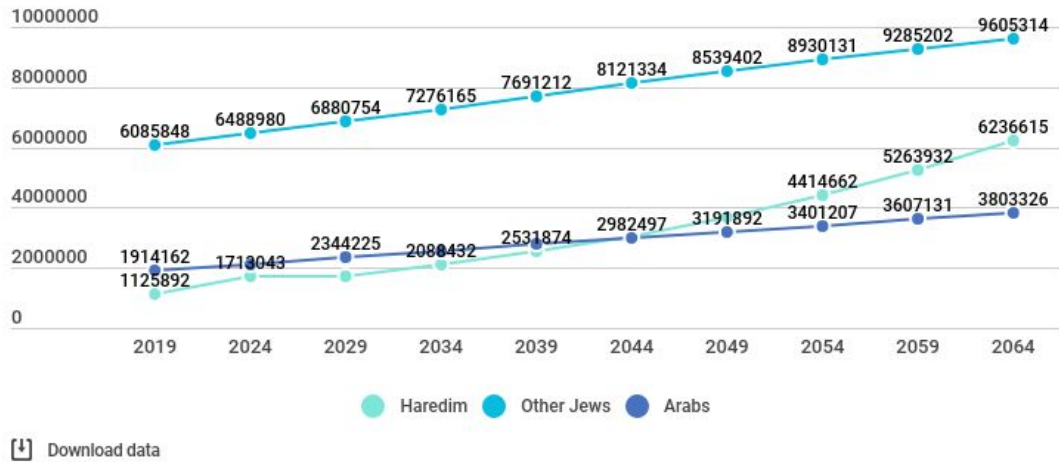
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A. Population

The annual rate of growth of Israel's ultra-Orthodox population is the highest of any population in the developed world—approximately 4%. Behind this unusually high growth rate, lie high fertility rates, modern standards of living and medical care, a young age at marriage. This is a very young population: Almost 60% are under the age of 20, compared with 30% among the Jewish population. In 2019, the ultra-Orthodox population numbered 1,125,000, compared with 750,000 in 2009, and now constitutes 12.5% of Israel's total population. According to Central Bureau of Statistics projections, this figure will rise to 16% of the general population by 2030, reaching two million people in 2033. Analysis of fertility rates among ultra-Orthodox families over the last decade and a half reveals a slight drop – from 7.5 live births per woman between 2003 and 2005, to 7.1 between 2015 and 2017. The average fertility rates among other Jewish women in Israel stand at 4.0 for national-religious women; 3.2 for traditional-religious women; 2.5 for traditional non-religious women, and 2.2 for secular women.

The marriage rate among the ultra-Orthodox ages 20 and above —for both men and women—is far higher (84%) than the corresponding rate among other Israeli Jews (62%). This gap is explained by the young average age at marriage among the ultra-Orthodox. However, over the years there has been a moderate rise in age at marriage: In 2003–2004, for example, 23% of ultra-Orthodox Jews ages 20–29 were single; by 2017–2018, this had risen to 31%.

Figure 1: Population Projections by Population Group, 2019–2064



B. Education

Ultra-Orthodox Students by Education Stream

The ultra-Orthodox education stream constitutes a significant portion (24.5%) of the Hebrew-language education system in Israel and of the Israeli education system as a whole (18.5%). Since the turn of the millennium, there has been a rapid growth in the number of students in ultra-Orthodox educational frameworks, though this trend has slowed down over the last five years (to 3.4% per year), alongside a rise in the rate of growth in the State and State-Religious education streams (to 2.3% per year).

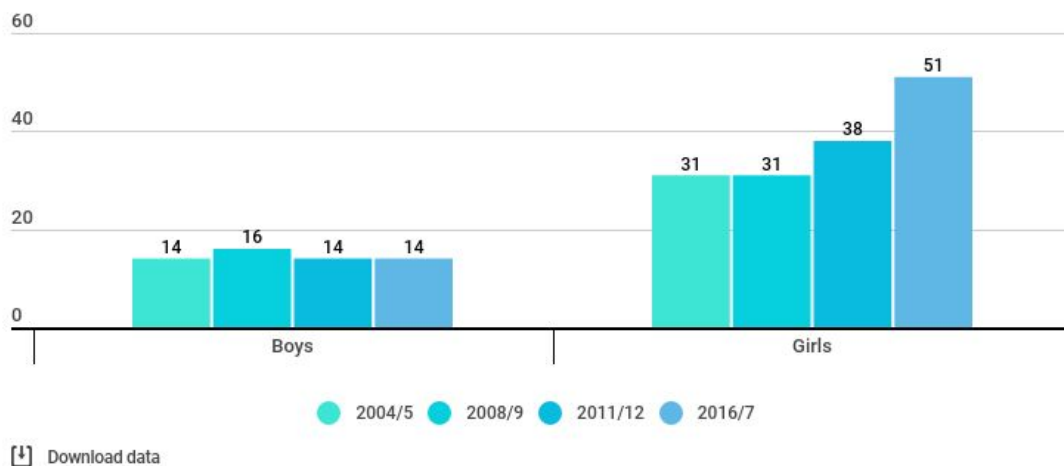
Over the last decade, ultra-Orthodox education has undergone a series of systemic and structural changes, including the establishment of an official ultra-Orthodox department in the Ministry of Education and of a State-ultra-Orthodox education stream. In the 2018–2019 academic year, there were approximately 332,000 students in ultra-Orthodox elementary and secondary schools. The majority of ultra-Orthodox schools (75%) are “recognized, but unofficial,” (that is, they are not fully integrated into the state school system, but are recognized by the Ministry of Education and are under its supervision). This sector includes Agudat Yisrael’s independent school network and the Shas Bnei Yosef school network. Around one-quarter of ultra-Orthodox schools (23%)

are classified as “exempt” (and thus have minimal state supervision), and 2% are part of the state school system.

Bagrut: Matriculation Exams

In the 2016–2017 academic year, 51% of ultra-Orthodox girls in the relevant age group took at least one matriculation exam, compared with just 31% eight years earlier (2008–2009). By contrast, over the same period, there was a slight decline in the percentage of boys taking a matriculation exam, from 16% to 14%. The percentage of those achieving a matriculation certificate among ultra-Orthodox students in 2016–2017 was just 13%, compared with 79% in the state and state-religious education streams.

Figure 2: Ultra-Orthodox Students Taking *Bagrut* (Matriculation) Exams, by Gender and Academic year (%)



Yeshiva Students

In 2013 and 2014, the number of full-time students in yeshivas (for unmarried men ages 18+ and *kollels* (advanced religious seminaries for married men ages 18+ dropped, relative to previous years, but since 2015, the number has once again been on the rise. In 2018, there were 133,933 students in – yeshivas and *kollels*—among whom 70% were kollel students. This represents an annual growth of 6%, which is higher than the rate of population growth for the ultra-Orthodox sector as a whole.

Figure 3: Number of Yeshiva and *Kollel* Students, 2012–2018



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Academic Studies

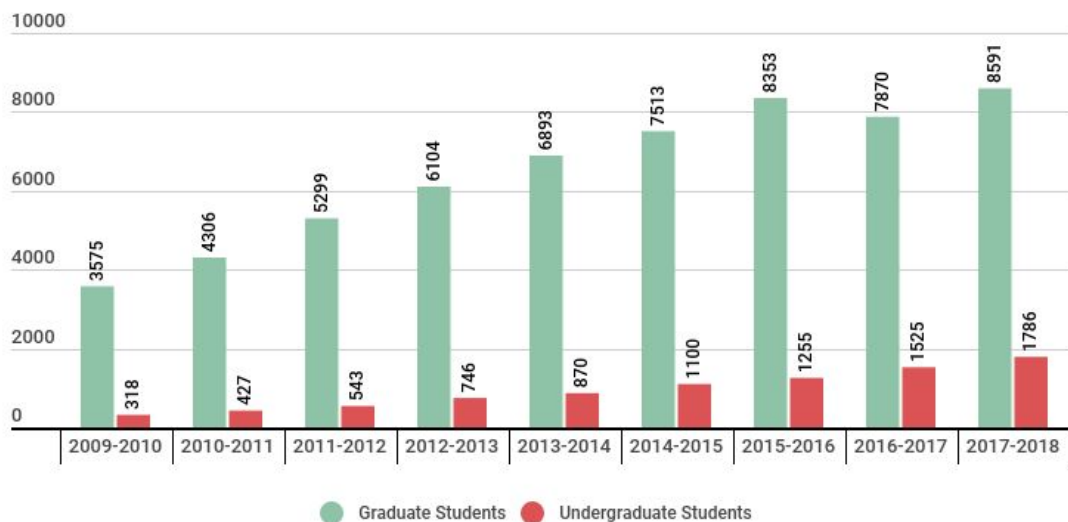
For many years, the number of ultra-Orthodox students in programs leading to an academic degree was extremely low. However, in the wake of changes in the demands of the labor market and the establishment of academic institutions adapted to the specific needs of the ultra-Orthodox, the period between 2010 and 2019 saw a dramatic rise—by 160%—in the number of ultra-Orthodox students in higher education institutions.

In the 2018–2019 academic year, there were some 12,000 ultra-Orthodox students in academic institutions (including the Open University) – 70% of them, women. The subjects they studied are mainly practical and applied, and open up opportunities for employment within the ultra-Orthodox community, such as education and teaching, paramedical professions, computers, and business administration. Thus, among the ultra-Orthodox, higher education serves as the path for entry into the labor market in the chosen field of study.

In 2016–2018, there was a rise of just 11% in the number of ultra-Orthodox students, relative to the previous academic year.

This slowdown in growth can be attributed to the cutback in government incentives for employment, which weakened the motivation for both employment and for higher education, especially in light of the parallel increase in financial support for *kollel* students. In addition, there was a drop in law school registration, due to more stringent regulation in this field and a cutback in scholarships.

Figure 4: Ultra-Orthodox Students in Institutions of Higher Education, by Level of Degree and Academic Year (not including the Open University)



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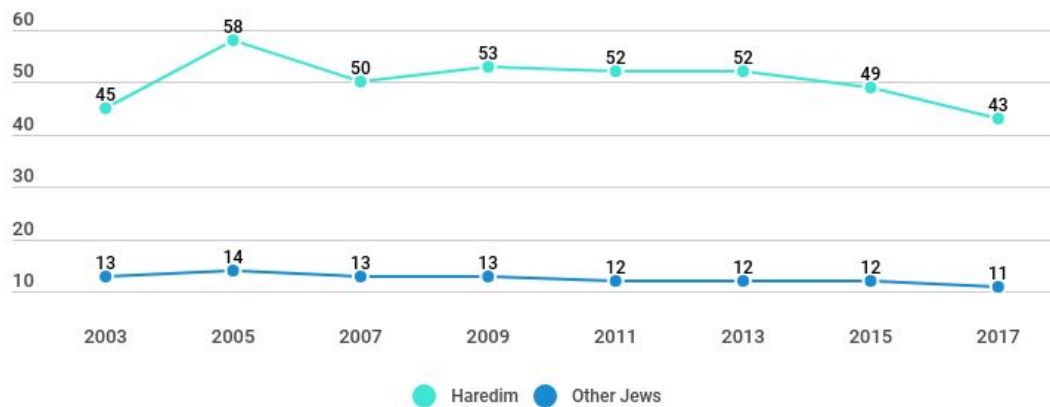
C. Standard of Living

Poverty Rates

Poverty rates among the ultra-Orthodox are much higher than among other Jewish Israelis. In 2017, almost half of all ultra-Orthodox families (43%) were living below the poverty line, compared with 11% of other Jewish families. However, while this figure is undoubtedly high, it marks an improvement after more than a decade, during which the percentage of ultra-Orthodox families living below the poverty line ranged from 50%

and 58%. Since 2015, there has been a consistent and significant decline in the prevalence of poverty among the ultra-Orthodox, which can be attributed to several factors, including an increase in the number of ultra-Orthodox families with at least one breadwinner; a rise in incomes among ultra-Orthodox adults who are employed; a rise in employment grants (negative income tax), in National Insurance Institute child allowances, and in state support for *kollel* students.

Figure 5: Prevalence of Poverty Among Families, by Population Group (2003-2017)



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Income and Expenditures

Standard of living is closely linked to household income and expenditures. In 2017, the average gross monthly income for an ultra-Orthodox family was NIS 15,015, far lower than that of other Jewish families (NIS 22,190). However, in a single year—2017—there was a rise of NIS 1,050 per month in the average monthly income from employment among ultra-Orthodox households, much of which can be attributed to a rise in the average salary of ultra-Orthodox women. Consequently, there was a rise of 40% in taxes and in payments to the National Insurance Institute among ultra-Orthodox families between 2015 and 2017, though this expenditure still stands at just 43% of the same expenditure among other Jewish families.

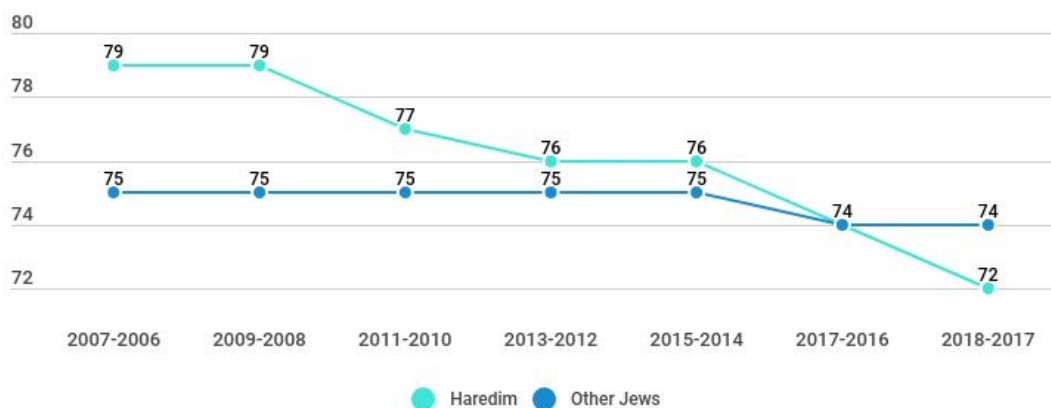
Surprisingly, despite their relatively low level of income, 68% of ultra-Orthodox Israelis report being satisfied or very satisfied with their financial situation.

In terms of expenditures, the average per capita monthly expenditure among the ultra-Orthodox is less than half of that among the rest of the Jewish population (NIS 2,135 per month versus NIS 4,590), even though the average household size is larger among the ultra-Orthodox. In 2017, for example, ultra-Orthodox households expended NIS 14,311 per month on the average– 18% less than the average for other Jewish households.

Car and Home Ownership

The gaps between the ultra-Orthodox and the rest of Israel’s Jewish population are also evident in car ownership: In 2018, 44% of ultra-Orthodox Jews owned a car, compared with 81% of other Jews. The two groups are more similar when it comes to home ownership, with rates of 72% among the ultra-Orthodox and 74% among other Jews. However, the rate of ultra-Orthodox home ownership dropped from 79% to 72% between 2006 and 2018, while the rate among other Jews stayed steady over this period.

Figure 6: Home Ownership among those Ages 20 and Above, by Population Group, 2006–2018 (%)

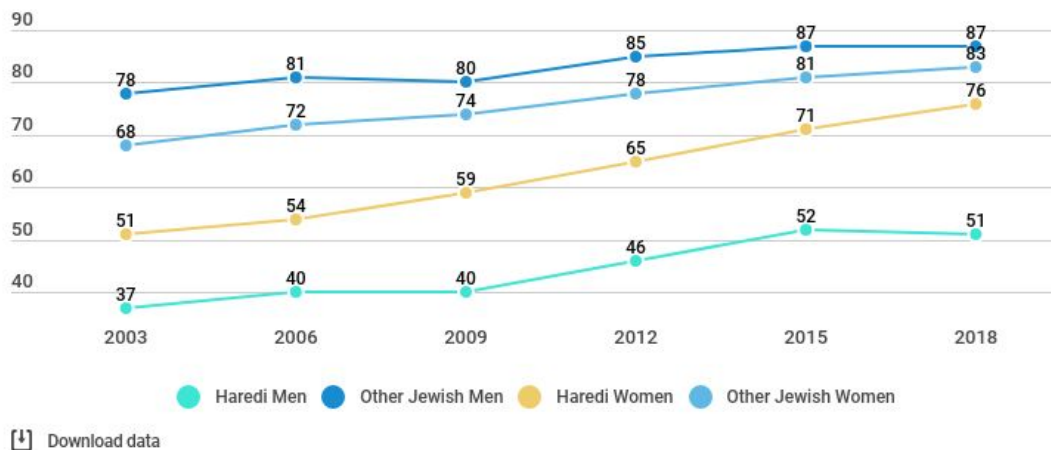


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D. Employment

Between 2003-2018, a combination of pressing economic circumstances and public policies supporting the entry of ultra-Orthodox Jews to the labor market resulted in a large increase in employment rates among the ultra-Orthodox—among both men and women. As a result, more than 50% of ultra-Orthodox men ages 25–64, and 76% of women in the same age bracket are employed. However, the impressive rise in employment rates over several years came to a halt in 2015. Since that time, the rate of employment has not changed among ultra-Orthodox men, but among the women—the rate continues to rise. It is possible that the standstill among men is the result of coalition agreements of the government formed in that year, which led to a cutback in the incentives for entering the labor market, and an increase in financial support for yeshiva and *kollel* students.

Figure 7: Employment by Population Group and Gender (ages 25-64) (%)

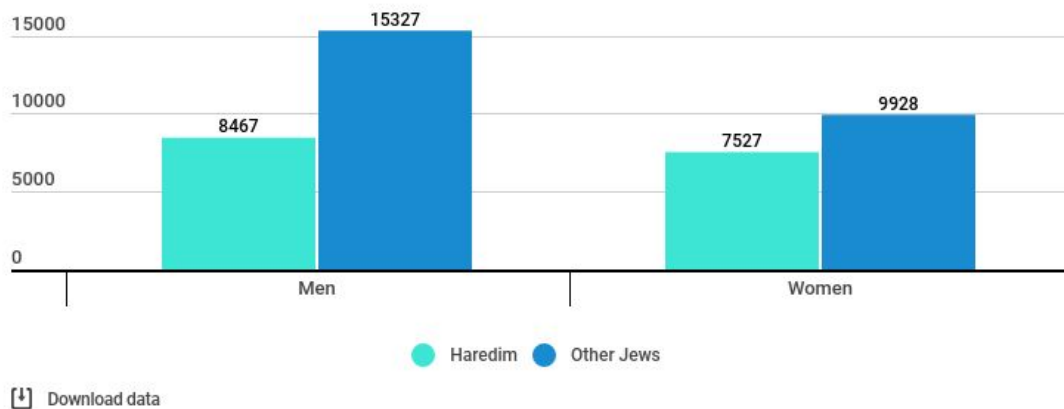


Salaries

In analyzing employment patterns, a vital component which must be taken into account is the level of income from work. The average salary for ultra-Orthodox workers in 2017 was 63% of that of other Jews. This gap can be explained by the fact that the ultra-Orthodox generally work fewer hours, and earn lower salaries, due (among other factors) to their predominance in low-paying fields of employment, such as education,

while—by contrast, the numbers of ultra-Orthodox workers in industry and hi-tech are small. However, recent years have seen a drop in the proportion of ultra-Orthodox workers in the field of education, and an increase in the numbers of those employed in industry. If this trend gains momentum, it would likely result in higher per capita incomes in the future, and consequently, in higher standards of living in ultra-Orthodox households.

Figure 8: Average Gross Monthly Income, (NIS) by Population Group and Gender, 2017 (ages 25–64-)



E. Lifestyles

The lifestyles of the ultra-Orthodox are in a process of constant flux. More and more ultra-Orthodox Israelis are using the internet, holding a driving license, and taking vacations. It is clear that despite the significant gaps which still exist between the ultra-Orthodox and the rest of the Jewish population in these areas, there is a growing trend towards greater integration of the ultra-Orthodox into the Israeli mainstream.

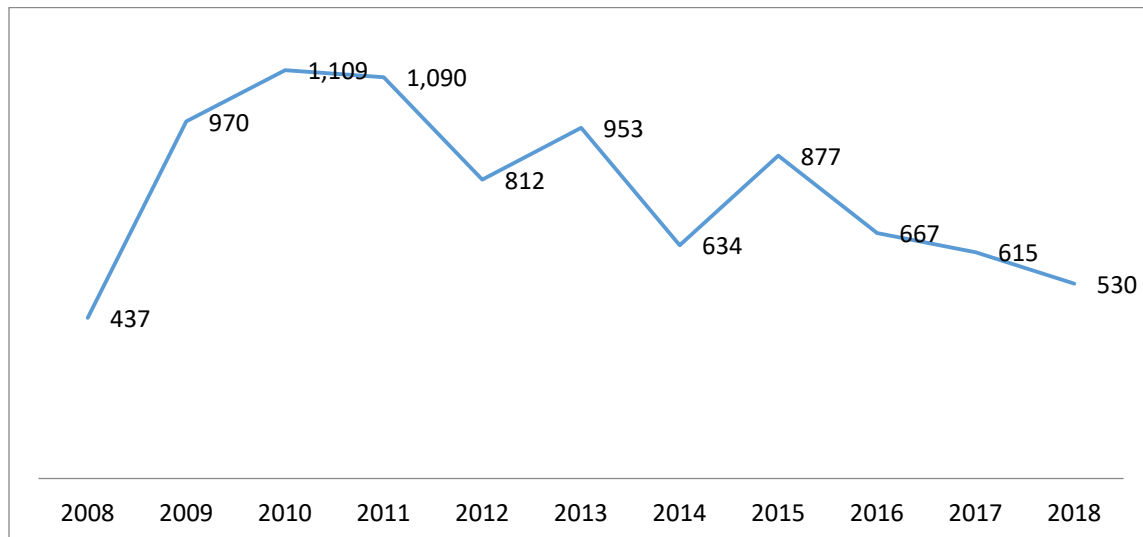
Enlistment into the IDF and Volunteer in Civilian National Service

At the end of 2019, the head of the IDF's Manpower Division appointed a commission to review the data on ultra-Orthodox conscription to the IDF, following media reports of inflated figures. Until a full review of this issue has been completed, we are unable to

discuss ultra-Orthodox service in the IDF, and are confining our analysis to volunteering in civilian National Service programs. Once the data on IDF service has been fully reviewed, we will update our data in the online version of this Report.

In 2018, 530 ultra-Orthodox men joined civilian National Service programs—that is, only 5% of male graduates of the ultra-Orthodox education system. This figure of 530 is only one-quarter of the most recent (2016) target that was set of 2,000 new recruits. . Over the past few years, civilian National Service has become less and less attractive for the ultra-Orthodox, and the numbers joining this service in 2018 dropped to less than half of those in 2011.

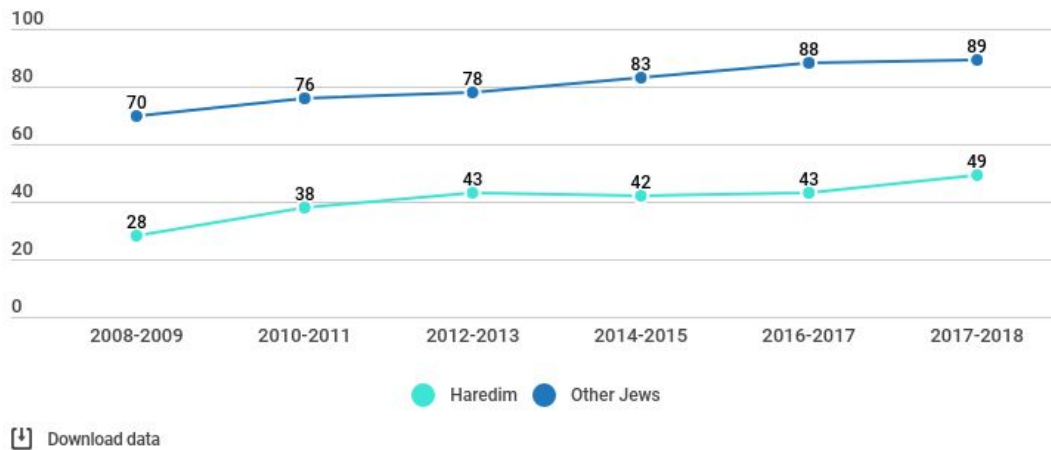
Figure 9: Ultra-Orthodox Volunteers in Civilian National Service, 2008–2018



Internet Use

For the first time, in 2017–2018, about half (49%) of ultra-Orthodox adults used the internet. By comparison, only 28% of ultra-Orthodox adults were internet users in 2008–2009. However, this is still a low rate when compared with the rest of the Jewish population, among which 89% of adults use the internet.

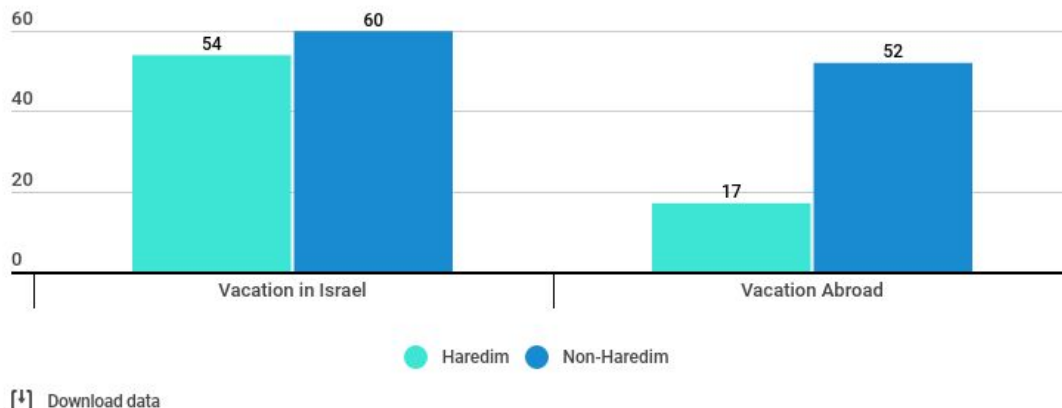
Figure 10: Internet Use by Population Group (ages 20+) 2008–2018 (%)



Vacationing in Israel and Abroad

Ultra-Orthodox Israelis prefer to vacation in Israel, though there is a clear rise in the numbers taking vacations abroad. In 2017–2018, 54% of the ultra-Orthodox took a vacation in Israel, and 17% vacationed abroad. In recent years, as noted, there has been a sharp rise in the numbers of those vacationing abroad (up from just 12% in 2013–2014), though this rate remains very low in comparison to the rest of the Jewish population, among whom 52% take vacations outside of Israel.

Figure 11: Vacationing in Israel and Abroad, by Population Group, 2017–2018 (%)

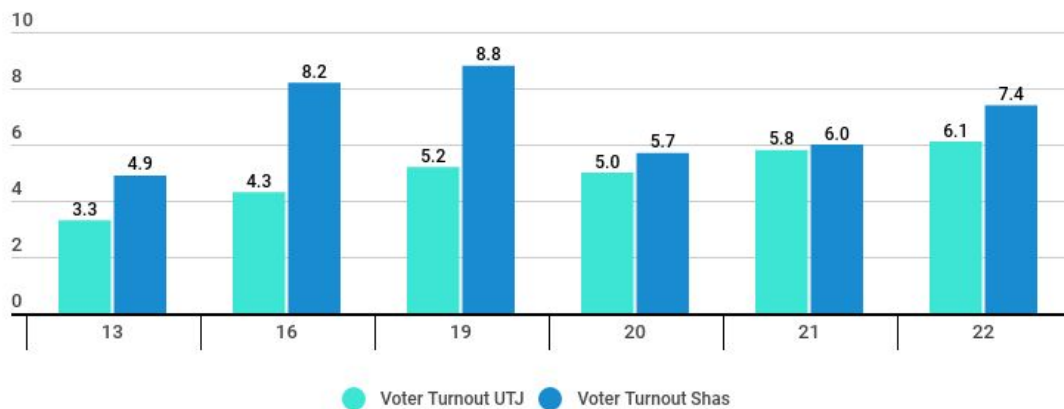


Voting Patterns in Knesset Elections

In the September 2019 elections for the 22nd Knesset, the ultra-Orthodox political parties (United Torah Judaism and Shas) garnered 13.5% of the total vote, compared with 8.2% in the 1992 elections. The voting patterns for United Torah Judaism (UTJ) are an indication of the number of ultra-Orthodox citizens in Israel and their geographic distribution. Some 24% of the UTJ vote came from Jerusalem, and 19% from Bnei Brak. Around 20% of UTJ voters are residents of the “new” ultra-Orthodox cities (Elad, Beitar Illit, Modi’in Illit, and Beit Shemesh), and another 12% live in large cities with a sizable ultra-Orthodox population (Haifa, Netanya, Ashdod, Petah Tikva, and Rehovot). The remaining UTJ voters live in Israel’s geographic periphery, and in other towns.

A comparison of the data from the 1992 and the 2019 elections reveals that as a result of significant influxes of the ultra-Orthodox to specific cities, the percentage of votes for UTJ has doubled or more over that period; Jerusalem, Ashdod, Haifa, and Arad. In Tel Aviv, by contrast, the percentage of UTJ voters was cut by half during the same period of time.

Figure 12: Voter Turnout for UTJ and Shas for the Knesset (13th (1992), 16th (2003), 20th (2015), 21st (2019); total in Israel)

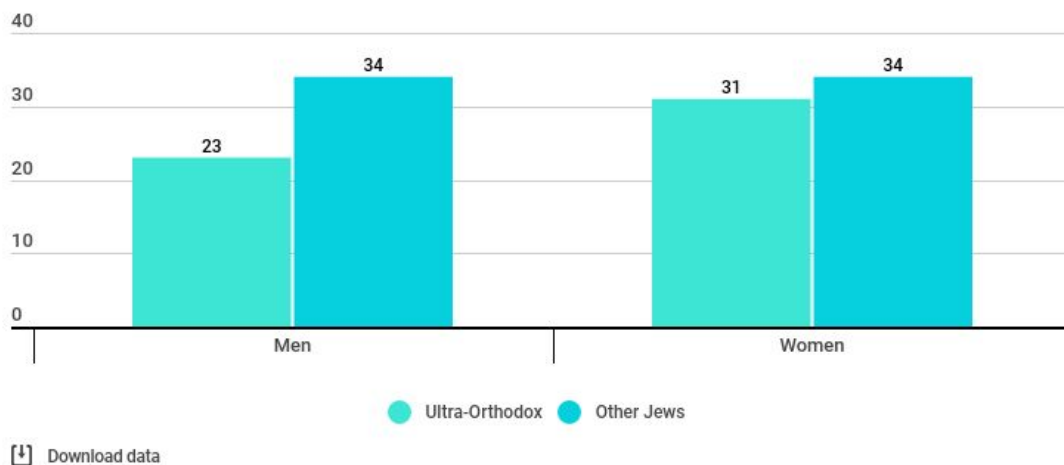


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F. Social Mobility

In the current report we are focusing on mobility along several dimensions of employment. The Central Bureau of Statistics' Social Survey shows that, in terms of employment, the mobility of ultra-Orthodox Jews is lower than that of other Jews in Israel. This relates to increases in salary, advancement at work, and being awarded greater authority in the workplace. However, the largest gaps in these areas are between ultra-Orthodox men and other men. By contrast, almost no difference was found between ultra-Orthodox women and other women, and thus— with regards to social mobility— gender is a more important factor than population group.

Figure 13: Given Greater Authority at Work (between 2008-2018, %)



Some specific examples: The percentage of ultra-Orthodox women who were given greater authority at work (31%) is very close to that of other Jewish women (34%). By contrast, only 23% of ultra-Orthodox men were given greater authority at work, versus 34% of other Jewish men. In addition, the impact of having children on employment rates among ultra-Orthodox women is less dramatic than in the past, and is now similar to that among other Jewish women.

There are large gaps between the ultra-Orthodox and other Jews regarding the factors they consider to affect an individual's social status. Ultra-Orthodox respondents believe that the individual has only limited control over his or her fate, and that Divine Providence is the most important factor influencing one's social status, while other respondents do not consider this factor to have much importance. In parallel, the ultra-Orthodox attribute less importance to factors such as education, financial situation, or profession. Another difference emerged regarding the question of whether ultra-Orthodox Israelis should benefit from affirmative action in higher education or employment: An overwhelming majority of ultra-Orthodox respondents are in favor, while only a minority of other Jewish respondents feels that the ultra-Orthodox should benefit from affirmative action.

Figure 14: An Individual's Social Status is Predetermined, by Divine Providence, by Population Group, 2018 (% in agreement)

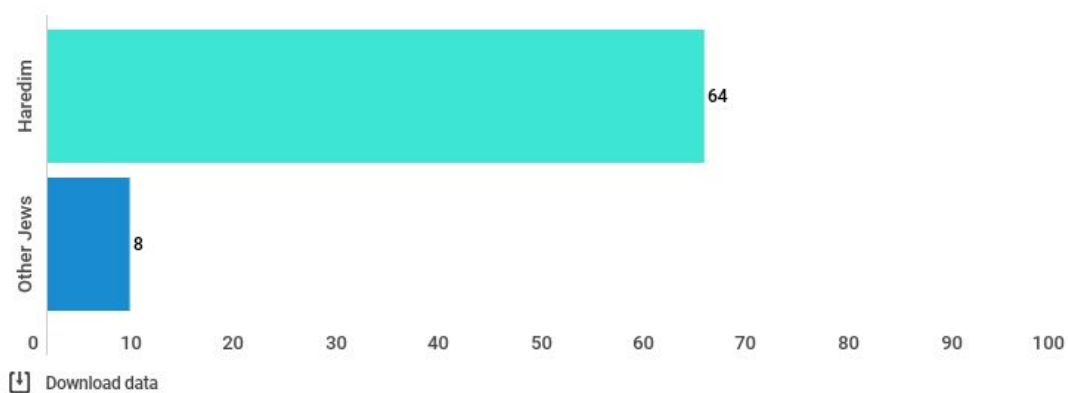
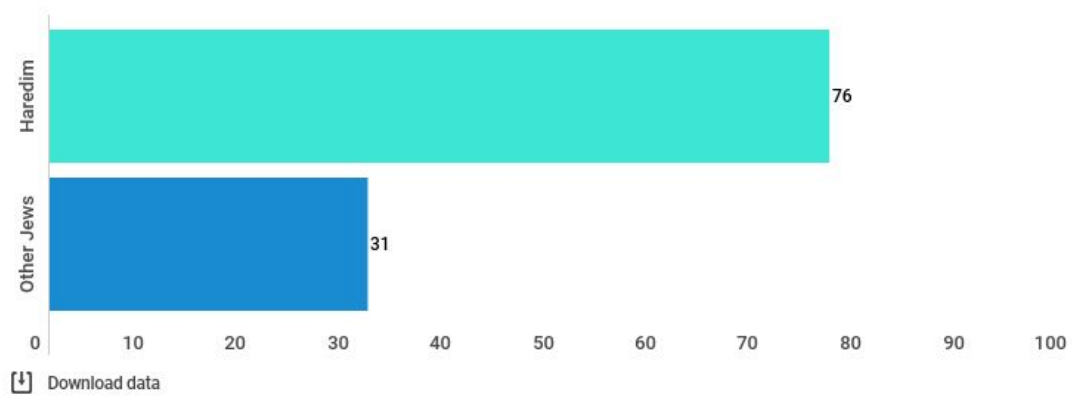


Figure 15: The Ultra-Orthodox Should Benefit from Affirmative Action in Employment or Studies (% in agreement)



*** The Statistical Report on Ultra-Orthodox Society in Israel is based on data from the Central Bureau of Statistics, government ministries and authorities, and the National Insurance Institute.*

The Israel Democracy Institute's fourth annual Statistical Report on Ultra-Orthodox Society in Israel brings together a wide variety of data on the ultra-Orthodox in Israel, including, among other topics, patterns in demography, education, and employment; on poverty rates and standard of living; lifestyles and voting patterns in Knesset elections, and analyzes the trends they reveal. This year the Report also includes data on social mobility, and presents comparisons between social mobility among the ultra-Orthodox and among other Jewish Israelis.

The Report reveals that the ultra-Orthodox community is far from being a homogeneous bloc, as often perceived by many outside the community, and that within the community – behavior patterns and lifestyles are not uniform. The rich information in the Report reveals a multi-faceted community, in some ways – very different from the rest of Israeli society; in others—quite similar. This is indeed a conservative community, but one deep in the midst of a process of rapid and significant change.

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